Anatomy of a Highly Effective Status Report

Writing a status report is easy. Writing one that stakeholders will actually read takes a bit more work.

BY SANDRA SWANSON

If creating an effective status report were as simple as filling in a template, every project could avoid communications gaps. Status updates require thought and attention—from targeting the audience to filtering information—if they're truly going to drive project success. Three project managers share their tips for crafting reports that get the attention they need.

Get to the Point

When it comes to communicating with clients, a status report does more than update them on the project—it also lets them know what the project team needs from them, and when.

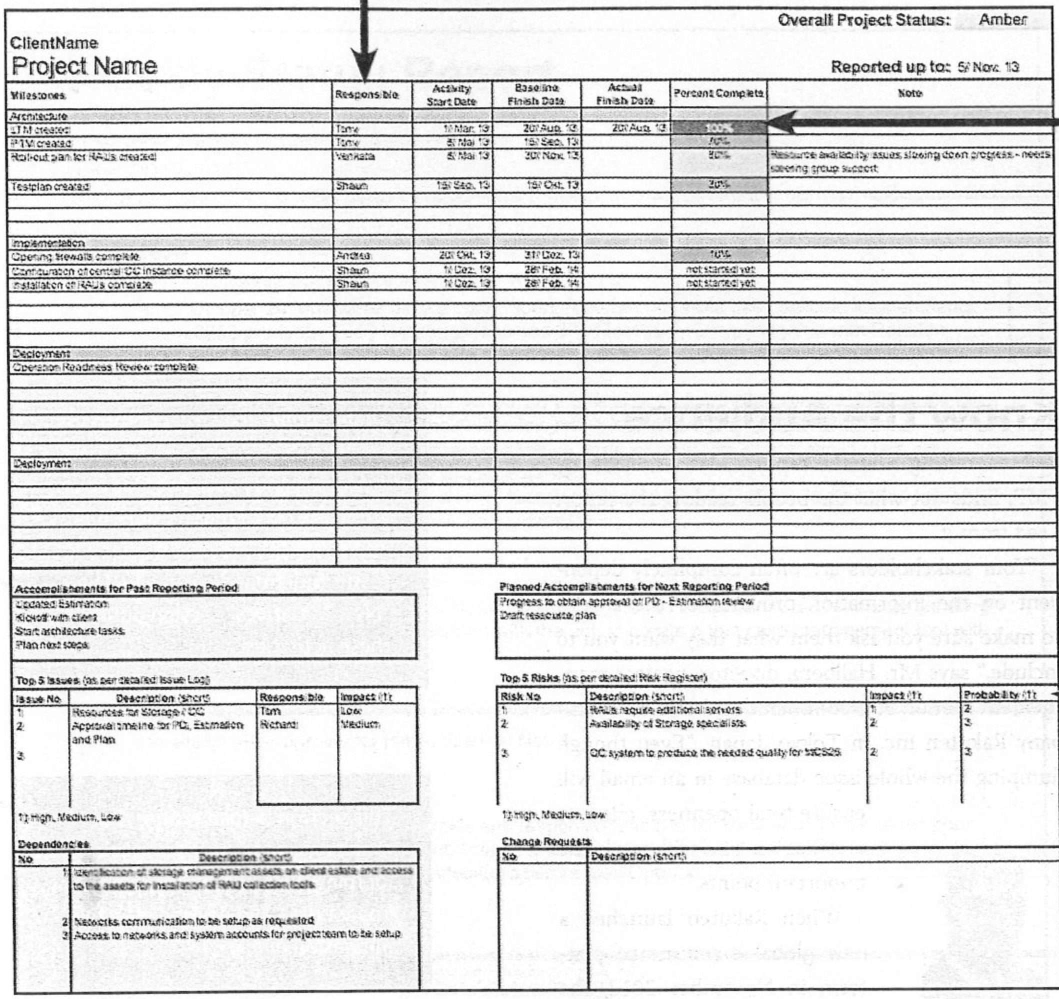
While working with a client building several new data centers around the world, Daniel G. Glasow, PMP, relied on his report to communicate the project's needs clearly.

"The report was seen as a dashboard to be able to check on the most important parameters, in order for the client to understand how the 'project engine' works," says Mr. Glasow, program manager for IT services company CSC, a PMI Global Executive Council member, in Hamburg, Germany. With that understanding in place, the client then knew when to provide the data centers with facility services such as power and cooling. Those services had a dramatic impact on each data center's timeline.

"Naturally, the client was seeing our projects as responsible for reaching certain contractual milestones, but without the client delivering its parts, our project would not have been successful," Mr. Glasow says. "It was necessary to make those dependencies transparent right from the beginning of the initiative and to follow up very closely." That close follow-up occurred via weekly status meetings discussing the report.

Just as important as what a status report says is how it says it. "From my experience, status reports have to be simple, short and clearly structured," Mr. Glasow says. Project practitioners must be able to break down complex

"Naming responsible parties helped the client visualize milestones they were responsible for achieving on time," Mr. Glasow says.



Overall Project Status: Amber

ClientName

Project Name

Reported up to: 5/ Nov. 13

Milestones	Responsible	Activity Start Date	Baseline Finish Date	Actual Finish Date	Percent Complete	Note
Architecture						
LTM created	Tome	1/ Mar. 13	20/ Aug. 13	20/ Aug. 13	100%	
PTM created	Tome	5/ Mai 13	15/ Sep. 13		70%	
Roll-out plan for RAUs created	Venkata	5/ Mai 13	30/ Nov. 13		80%	Resource availability issues slowing down progress - needs steering group support
Testplan created	Shaun	15/ Sep. 13	15/ Okt. 13		20%	
Implementation						
Opening firewalls complete	Andrea	20/ Okt. 13	31/ Dez. 13		10%	
Configuration of central QC instance complete	Shaun	1/ Dez. 13	28/ Feb. 14		not started yet	
Installation of RAUs complete	Shaun	1/ Dez. 13	28/ Feb. 14		not started yet	
Deployment						
Operation Readiness Review complete						
Deployment						

Accomplishments for Past Reporting Period

Updated Estimation
Kickoff with client
Start architecture tasks
Plan next steps

Planned Accomplishments for Next Reporting Period

Progress to obtain approval of PD - Estimation review
Draft resource plan

Top 5 Issues (as per detailed Issue Log)

Issue No.	Description (short)	Responsible	Impact (1)
1	Resources for Storage / QC	Tom	Low
2	Approval timeline for PD, Estimation and Plan	Richard	Medium
3			

1) High, Medium, Low

Top 5 Risks (as per detailed Risk Register)

Risk No.	Description (short)	Impact (1)	Probability (1)
1	RAUs require additional servers	1	2
2	Availability of Storage specialists	2	3
3	QC system to produce the needed quality for ttCS25	2	3

1) High, Medium, Low

Dependencies

No	Description (short)
1	Identification of storage management assets on client estate and access to the assets for installation of RAU collection tools
2	Networks communication to be setup as requested
3	Access to networks and system accounts for project team to be setup

Change Requests

No	Description (short)

"Using the color code provided a simple mechanism to identify easily where support of the steering group was required."

"It helped to touch very quickly each week upon the top risks and issues, since various stakeholders were required to support mitigation and resolution activities."

"From my experience, status reports have to be simple, short and clearly structured. If the project manager is not able to explain the status in a few words, there are sometimes underlying problems."

—Daniel G. Glasow, PMP, CSC, Hamburg, Germany

information into comprehensible pieces, he notes. If a report has too much text, the status-report meetings will get bogged down in details—instead of ensuring proper strategic guidance.

A wordy report also might camouflage a manager's uncertainties about the project, Mr. Glasow says. "If the project manager is not able to explain the status in a few words, there are sometimes underlying problems."

While overseeing a project management unit, Mr. Glasow noticed that reports from one project manager included up to 10 slides, with very detailed information about specific activities. However, there was one question the reports didn't seem to answer: How was the project doing? "His team was telling him all the good things they had done, but he was unable to translate that into a precise status of his project," Mr. Glasow says.

Instead of covering every single aspect of the project, reports should point out only those factors that will help it succeed.

Know the Audience

Before crafting a status report, Mattias Hallberg, PMP, finds out what the people reading the report need from it.

"Your stakeholders are often completely dependent on the information provided in the report, so make sure you ask them what they want you to include," says Mr. Hallberg, director, project management section at e-commerce and Internet company Rakuten Inc. in Tokyo, Japan. "Even though dumping the whole issue database in an email will ensure total openness, chances are that no one will catch the important points."

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—Mattias Hallberg, PMP, Rakuten Inc., Tokyo, Japan

When Rakuten launched a new global e-commerce platform in November 2012, the project involved more than 150 team members—who "were in great need of direction and constant information about what the other teams were up to," Mr. Hallberg says.

Concerned that so many team members might not maintain a standard level of quality, the project management team looked to the weekly report both to align the teams and to provide overall progress updates.

To achieve those aims, Mr. Hallberg created a report that provided the bigger picture and, for those who needed it, the smaller details. "I wanted to keep it short and concise yet very informative to ensure that decision-makers and team members would keep reading it." He created a brief, color-coded section that acts as an executive summary. "Through color coding, it is easy for decision-makers to judge if they need to read further," he says. For those who craved details, the report conveniently provided links to other pages or dashboards.

Mr. Hallberg says he learned a few other tips about devising status reports:

- Never name names. Instead, focus on the activities.
- If unsure about project details, verify them with more than one source.
- Always remain objective, and do not draw conclusions about areas you do not oversee.

The e-commerce project prompted significant changes in technology, processes and tools. That led to an emphasis on kaizen—continuous improvement—to ensure that all teams functioned optimally. The "New Initiatives" section outlined these activities.

This section helped ensure that project managers kept an eye on looming high-probability, high-impact risks and devised effective mitigation plans.

Weekly Status Report

Project Name: Mercury
Project Manager: Mattias Hallberg
Date: 2012-10-25
(Report Key: GREEN = good/positive status, RED = needs attention/negative status)

Summary

- Internal release for 1.6 was completed on schedule.
- As of October 24, one week before public open, Rakuten Malaysia has collected 48 merchants, about 9000 products, 5246 Facebook fans and 673 Members. Comparing this with Rakuten Indonesia's Go Live, where we had 28 merchants and 8000 products (books excluded), things are looking pretty good
- A total of 426 test cases were executed during a 5 hour post-deploy test cycle. A few issues were found and one critical fix was completed within one hour after deployment finished
- In preparation for Mall Open, maintenance will be done on both Oct 31 and Nov 1. This will include some enhancements and bug fixes as well
- Several deferred bugs (link) need to be fixed and scheduled for upcoming service releases
- Project schedule for future releases was updated (link)

New Initiatives

- [Requirements] JIRA Components hierarchy was updated to enable easy requirements handling
- [Test/Automation] A project was started with the aim to create a test case management tool with integration to JIRA

Blockers

- Awaiting CEO approval for public open on Nov 1

Risks

- Due to the latest reorganization, roles and responsibilities are not clear which may cause poor response for Trouble Management. Project Management team will discuss with each group to ensure that the process is fully understood before Mall Open
- Full risk register (link)

Milestones

Release	Milestone	Target Date	Actual Date
1.6	Specification Complete	9/11	9/24
	Code Complete	10/5	10/11
	Test Complete	10/24	10/23
	Internal Release	10/25	10/24
	Mall Open To Public	11/1	-

Details

- Project Home Page (link)
- Project Schedule (link)
- Product Roadmap (link)
- JIRA Dashboards
  - Development Status (link)
  - Bug Status And Other Details (link)
  - Time Sheet Data (link)
  - Tasks Due (link)
  - Team Load (link)

Metrics

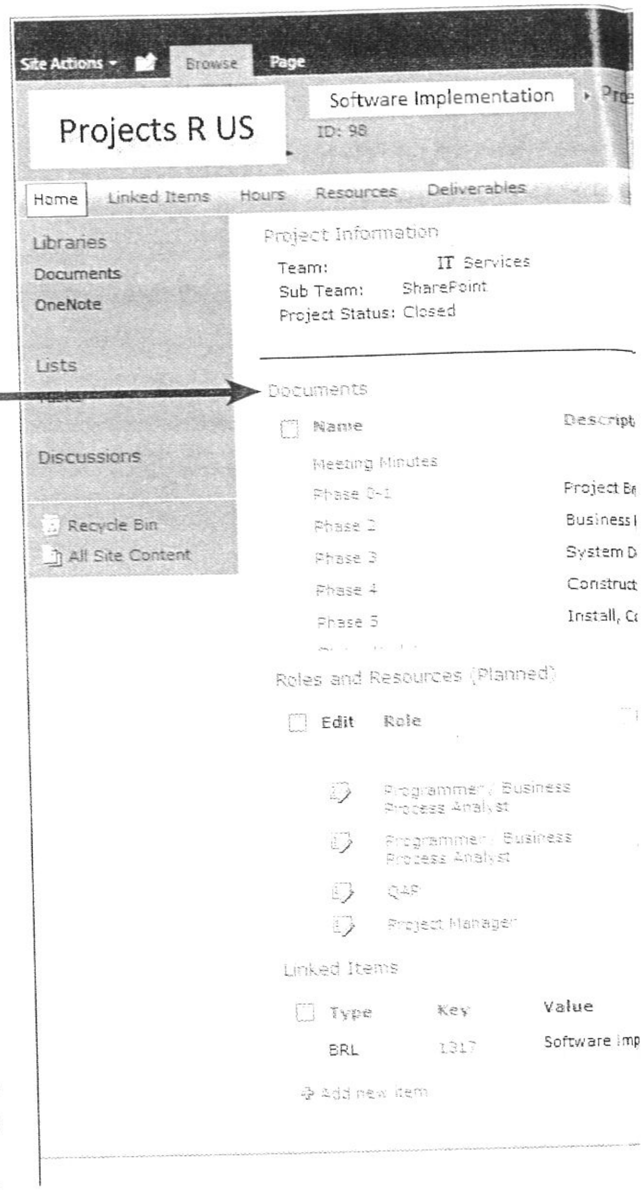
Test Status

Color coding and content-specific formatting give stakeholders a clear overview. The rule of thumb Mr. Hallberg uses: After spending 10 seconds with the report, stakeholders should know if they need to keep reading.

This section lists items requiring assistance by management, including slow-moving bug fixes and unclear requirements priorities.

A clear rundown of milestones helps provide alignment, says Mr. Hallberg. "Our process is 'inter-waterfall-agile,' so team members are often working on more than two releases at a time."

All project documents are stored in the appropriate phases to allow project participants fast and easy access, says Ms. Soniat. The online system "can alert you to changes in documents or the addition of documents, and document versioning is also available."



Consider the Delivery Method

It's not always the message that's the problem; sometimes it's the messenger. Kathi Soniat, PMP, works on a project with a company that used to distribute status reports via weekly emails—where they languished.

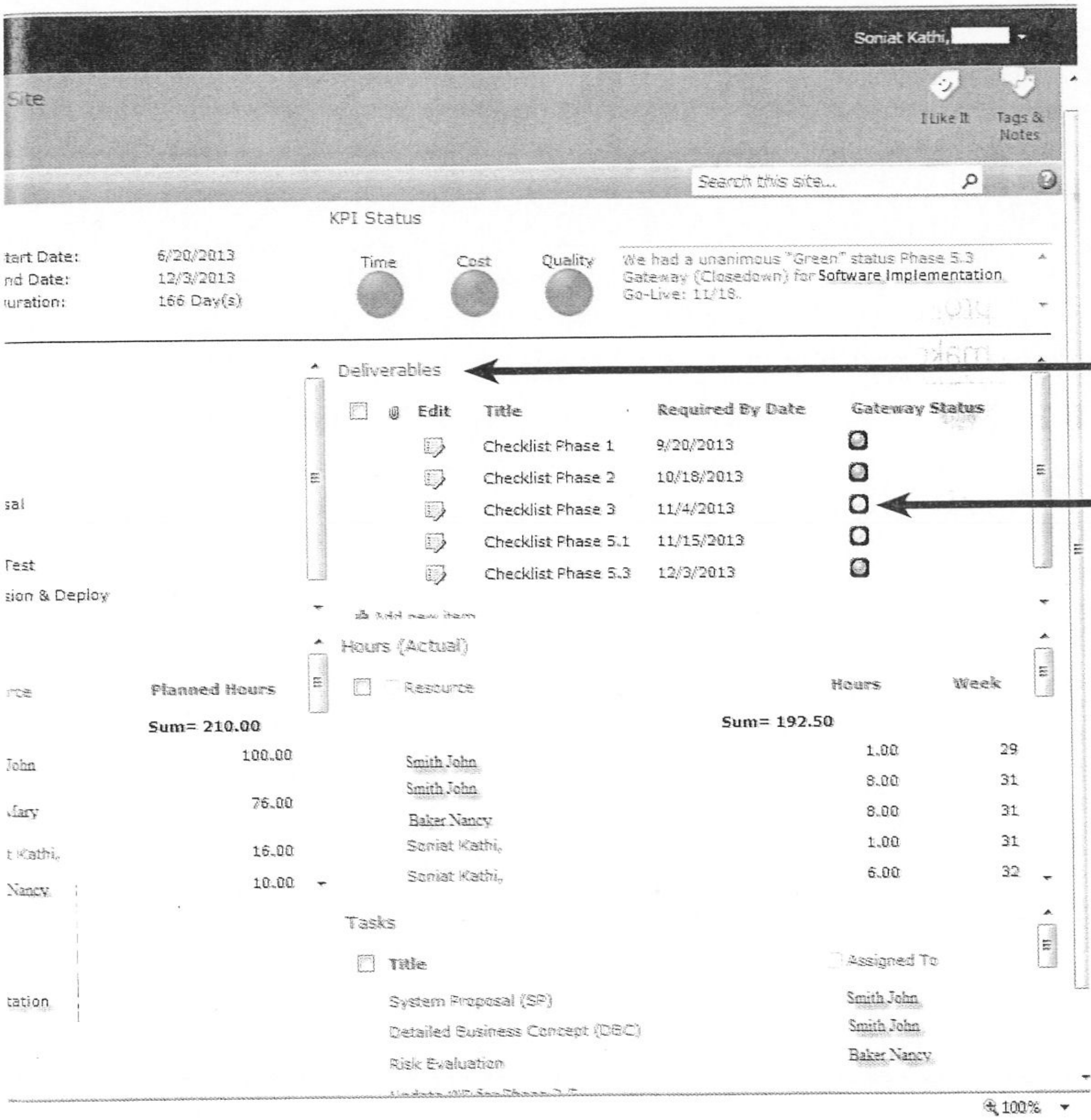
"Sometimes the emails were ignored or delivered at a time when the recipient was engaged with other topics," says Ms. Soniat, a project management contractor for technology solutions and human resources company Randstad Technologies, Greer, South Carolina, USA.

Last year, the organization began sharing status reports online. They're constantly updated and always available on a website that provides both a quick dashboard view of projects and a more detailed view if needed. Team members rely on it as a living document rather than a static one. "Our project-status tool is consistent across each project and gives a good visual of where the project stands at a glance," Ms. Soniat says.

That's especially useful because some projects are part of an international initiative spanning several countries and U.S. locations. Meetings often include video conferencing and always involve participants in multiple time zones, says Ms. Soniat: "Having one place to see all documents and project status makes this work efficiently."

The overall project status—based on time, cost and quality—is displayed at the top of the screen, with space for notes if a status needs explanation. At a glance, users can see what teams and sub-teams are assigned, who is tasked with particular roles and when milestones are due. Actual, logged project hours can be compared against original estimates.

Before the new system, a team member had to visit every active project site to compile the status of each into a slide presentation for the weekly



Originally, the company's status reports showed all deliverables—and whether they were in or out of scope—to indicate that each had been considered. That became too confusing to read. "We no longer show those which are out of scope on the dashboard view. However, those items can still be viewed in the detail view," says Ms. Soniat.

"This project, a software implementation, revealed an existing software problem during phase three that could not be corrected under the project scope," Ms. Soniat says. "The yellow status of the gateways documented that risk, the business accepted that risk, and another separate project was planned to solve the issue."

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—Kathi Soniat, PMP, Randstad Technologies, Greer, South Carolina, USA

managers' meeting. That time-consuming task is a thing of the past: The current system is integrated at the portfolio level, so no additional reporting time is required, says Ms. Soniat.

Stakeholders can get from the report what they need as they need it. "A one-size-fits-all report does not work for all stakeholders. Too much information can overwhelm; long reports can exasperate," Ms. Soniat says. "The frequency, level of detail and delivery method depends on where that person fits into the project team and the information they require."

Ms. Soniat's team members expressed appreciation for the system's convenience and offered high praise: The status report is so easy to read, it gets read.

Don't Do This

We asked project practitioners: What's a common mistake new project managers make that can keep status reports from being read?

Going It Alone

"Never do a status report in a vacuum. Always review it with the project team and other key stakeholders before it is distributed within the larger organization. There may be some nuances and sensitivities about progress or key milestones that can be presented in many different ways. The savvy project manager will collaborate on input and craft accordingly. I once earned the nickname 'The Velvet Hammer,' and I wore this as a badge of honor. My client said I could be tough and 'lay down the hammer' but do it in a way that did not destroy team morale. Developing team relationships makes it easier to have difficult conversations when necessary.

It's just as important that you don't email the status report in a vacuum. If you are relying on email as your only communication medium, chances are your project will not get the attention that it needs.

Instead, structure communication to accompany the status report. If everything is great, perhaps email is fine. But if you are bringing awareness to an issue—we are on track now, but there are one or more milestones that could be in jeopardy and mitigation is needed—send out the status report and follow up with a phone call or in-person meeting."

—Dan Gray, PMP, executive program manager, Texas Health Resources, Arlington, Texas, USA

Sending One Report to All Stakeholders

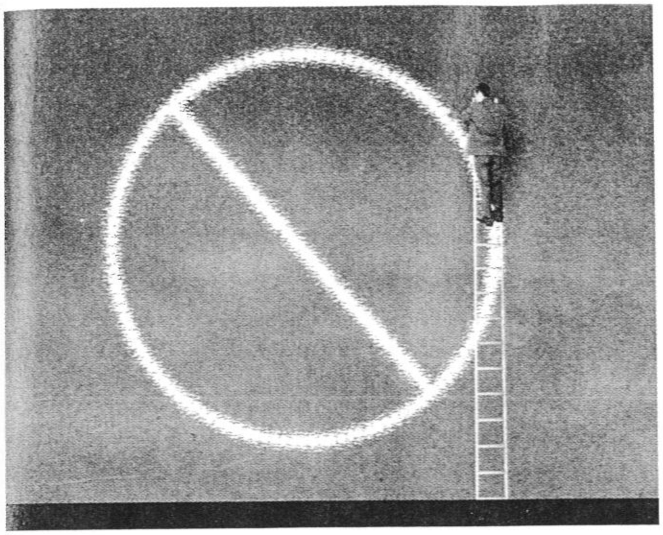
"Nowadays people are running back and forth from emails, meetings and trips. Time is the most valuable resource they have, and if we respect that, our communication will be more effective. If we want someone to pay attention, we need to give him or her relevant information. Yet this isn't always considered when writing status reports. New project managers should start by mapping stakeholder needs and communication styles. If a single report is going to be used for a wide audience, it shouldn't try to encompass everything. It should act as a dashboard, with detailed reports sent out for those team members who are interested in receiving them."

—Vania Neves, PMP, PgMP, IT director, GlaxoSmithKline, Rio de Janeiro, Brazil

Requesting Help

"I don't think the status report is the time to seek assistance, as that should be done as soon as a problem is identified. Instead, the status report should state the status: whether the project is on-target, off-target but recoverable or off-target but not recoverable. If the project's off-target, the status report should list solutions and actions already taken and indicate what needs to be done to move the project forward."

—Laurie N. Dunston, PMP, instructor—automation and production technology, Withlacoochee Technical Institute, Inverness, Florida, USA



Customizing Out of the Gate

"With time and experience, project managers are able to customize reports according to their needs. But new project managers shouldn't expect to create a perfect, tailored solution immediately. Seek out examples from other project managers and follow the approaches that make sense for this type of project. Stay open to feedback, questions, ideas and lessons learned, and realize that creating status reports is an iterative process."

—Saleh Sultan, PMP, sourcing leader, Nokia, Dubai, United Arab Emirates

Focusing on Chronology Over Metrics

"The main aim of a status report is to escalate risk and issues with stakeholders and get visibility for the accomplishments of the project team. Status reports should ideally cover these areas, rather than reporting the week-to-week activities. I think the other most common mistake project managers make when writing status reports is being less metric-driven than they should be. Project managers need to understand the importance of standardizing the metrics they're reporting. The metrics become part of a data set for program and portfolio reporting and also provide 360-degree feedback to team members."

—R. Rooban Annamalai, PMP, MPS program manager, Barclays, a PMI Global Executive Council member, London, England

Piling on the Bells and Whistles

"On my first project in my very first project manager position, I was ready to dazzle. I put together a chart to provide a weekly status update to our leadership and the project team. It graphically depicted burn rates for both in-house resource time and expenses for the vendor hours, as well as tasks completed in the previous week and any issues or risks that I deemed significant.

After the first week, I reviewed the slide with the project team. They nodded politely and asked no questions. I was convinced they were so impressed with my command of the situation that they couldn't speak. I then sent the report to the project sponsor, our senior vice president. No response. The following week, I followed the same process. Again, no response.

Finally, after sending in the fourth such weekly report and getting no response, I set an appointment to meet with her. She nodded politely while I reviewed it, then said, 'Why are you showing me all this? I expect you to keep track of all this. All I need is a monthly email telling me if the vendor is actually doing what their proposal said so I can approve the invoice.'

I was shattered. But I learned a valuable lesson: The project status reports are not for the project manager. Since then, I make sure I sit down with the project sponsor and any other organizational leadership to find out what they want to know. Then I give it to them. The process makes my life so much easier—and means my status reports are actually delivering value. But if they ever want a quad chart that shows burn rates, activity, issues and risks, I've got a template for that."

—Joseph L. Mayes, PMP, senior IS project manager, Mountain States Health Alliance, Johnson City, Tennessee, USA