

**PMEducation**

 WRITTEN REPORTS

**PERIODIC REPORTS**

As a Professional Project Manager, you are accountable for a wide variety of written reports. The purpose for these reports is to communicate information to Stakeholders for the purpose of decisions, actions, or awareness. Making reports is time consuming, but resist the temptation to procrastinate. Instead, try to assign report writing to a Team Member who will give it a high priority. This will take some initial set-up time on your part, but it will be worth it!

Your reports need to keep your audience in mind. This will help you focus on the right level of detail, frequency of reporting, and so on.

Most organizations will want you to report on: the current status of the project and on the work performance. This can be thought of as: “Where are We?” and “How is it Going?” Reports can address any one, or combination of, the 10 knowledge areas: Integration, Scope, Time, Cost, Quality, Human Resources, Communications, Risk, Procurement, and Stakeholders. On the following pages we will address two very common project management reports found in most organizations: the Project Status Report, and the Work Performance Report.

NOTE: Some organizations (PMI for example) consider the Project Status Report to be a sub-set of Work Performance Reports. In the current document we will view each type separately.

To be of maximum benefit reports should be comprehensive, accurate, and timely.

Remember to date all reports and add version numbers (if applicable).

PROJECT STATUS REPORTS:

These reports (PSR), address ‘Where are we Right Now.’ As such, they become outdated very quickly, but provide an excellent snap-shot of a moment in time. PRS’s are usually reported on a spreadsheet to provide a maximum amount of information in an easy to follow medium. The PSR is a very common report in most project-managing organizations. They are indispensable in organizations managing several projects simultaneously.

The Project Status Report is provided to give an overview of the current status. As such it is not detailed. If details are required, they should be provided in a supplementary report. Elements to include in your PSR, if applicable, are:

* Project Name, Project Charge Code
* Project Scope Statement
* Name of Project Manager
* Name of Prime Contractor, Purchase Order Number
* Name of Prime Consultant, Purchase Order Number
* Progress of Scope (work done) so far. Percent Complete
* Work to be done in the next reporting period
* Summary of Changes: Issued and Approved
* Actual Project Start Date
* Expected Project End Date
* Status, such as: Active, On hold, Pending approval, etc.
* List of Unresolved Risks

WORK PERFORMANCE REPORTS:

Work Performance Reports provide information on “how the project is going”. To do so, there needs to be measure against a plan. (Which means there needs to be a Plan!!)

As we effectively plan the Stakeholder Engagement, Scope, Time, Cost, Quality, Human Resources, Communications, Risk management, and Procurement, we establish SMARTWAM goals with measurable Key Performance Indicators. (See [Key Elements of Effective Planning](https://www.pmeducation.com/single-post/2016/11/01/Key-elements-of-effective-plannings), Sixth point, and follow the links). Work Performance Reports provide information which compares these approved Plans (baselines) to what has Actually happened. We call this “comparing Plan to Actual”.

Your Work Performance Report may include a section on Variance Analysis. In this section you would look at the variances (differences) between Plan and Actual, then look for causes of the variances. Ideally you would find and report on corrective actions to bring the Actual closer to the Plan; and on preventative actions to prevent reoccurrences of the variances.

A further extension of Performance Reporting can include forecasting. After looking at Status (Where are We?) and Performance (How is it Going?) we can address forecasting (Where will we end up?). Typically Time and Cost are forecasted and reported but any/ all of the 10 knowledge areas can be forecasted.

Work Performance Reports can use media of spreadsheets, E-mail (memo form), Web page updates, formal reports, and others.