



Point of View

S.M.A.R.T Status Reporting

How to Ace Your Status Report?

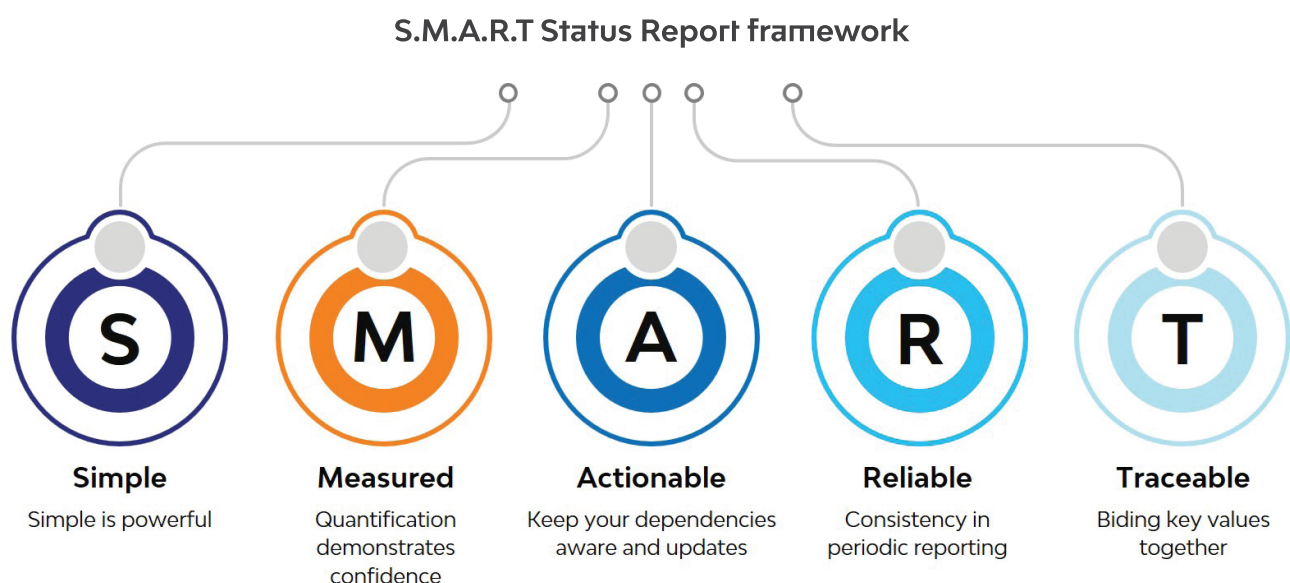
The moment a project manager's first status report lands in the inbox of stakeholders, it makes a statement about his level of competence. The status report is one of the key tools a project manager utilizes to communicate with stakeholders. Used judiciously, it can be a project manager's best ally, showcasing his excellence—provided it is a bold, clear, convincing, and resonating status report.

One of my prime takeaways in 20 years of project management is that being disciplined and following key best practices can help you ace this task. To simplify things, I have developed a framework that could act as a checklist—ensuring an effective status report. I have named the framework "S.M.A.R.T (Simple, Measurable, Actionable, Reliable, Traceable)."

Before we start, let's understand some ground rules:

- Every project's structure is unique. The communication needs to be tailored to suit the unique information demand of the project
- The report may not be able to satisfy all the stakeholders, so following the 20/80 rule may be beneficial. Focusing on 20% of the information that could satisfy 80% of targeted stakeholders may be the most efficient approach
- More information is poor or no information, and this is especially true for status reporting
- Weekly frequency of status reports is the most acceptable norm in the industry

1. S.M.A.R.T Framework for Status Reporting



Building effective status reports highlight the cognitive ability of a manager. This framework will help you architect a sound communication framework for your project.

Simple

Simple messages are the most powerful ones. The art of writing simple yet meaningful content needs practice; however, once mastered, it's a communication superpower to possess.

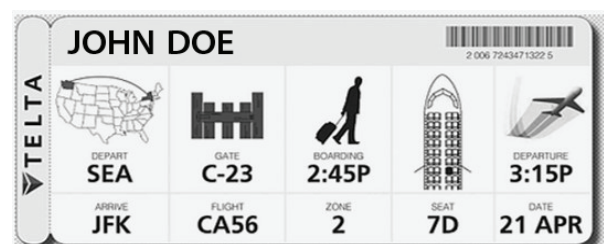
Project managers would benefit by using the following simplification techniques in drafting a status report:

- **Keep it lean.** The example of airline tickets becoming lean over the years is a case in point. Focus on the key messages you want to convey. Eliminate, for example, unwanted, or non-value-adding details also known as noise

This is a boarding pass



This is a lean boarding pass



Which of these two makes more sense to you?

- Reinforce your report with concise and short sentences, so that the message becomes clear, with minimal or no chances of distortion

Noisy Constructs

Team is working to resolve the identified security related issues by Friday.

The business team have reported many – more than 90 – errors during user acceptance testing. They believe that quality of the delivered product is poor and the business team will publish a summary report by Friday.

Concise Constructs

Security issues being resolved: **ETA Friday**

Poor Product Quality: 90+ UAT defects. Business summary report due Friday.

The key is to remember that the more you write, the more the stakeholders have to read and comprehend. Alongside this, noisy constructs give room for more interpretations than you would want.

- **A picture says a thousand words.** In the context of a status report, you can leverage visual messaging, such as symbols, icons, color-coding, and graphs. By using visuals, you can convey messages in a shorter, yet fluid, and comprehensive manner. However, be judicious in using visuals as heavily coded reports can be complex and, therefore, noisy

Measured (or Quantified)

A good status report measures (i.e., quantifies) the information with best-known assessments. If specifics are not available, it's always advisable to convey when they will be available.

The following examples would be helpful to keep in mind:

Qualitative - open ended	Quantified	Remark
Team will be fixing the issues in a few weeks.	Team will be fixing the issues in three weeks	Client / Management expects the PM to be diligent about when the issue needs to be fixed.
There were very few defects in the User Acceptance of the product.	21 defects (previous avg. 32) identified during UAT.	Stakeholders need to know what very few defects mean for you.
The mentioned risk could adversely impact project schedule.	<i>If impact known</i> - The mentioned risk could delay the project by three months . <i>If impact unknown</i> - The mentioned risk could delay the project. Impact to be confirmed by next week.	Your stakeholders expect you to manage the uncertainties as well.

Actionable

It is highly recommended that you leverage the status report to call out critical tasks to the assigned stakeholder. The status report should be extremely clear on all the action items so that every manager or team member understands without a doubt what is expected. This is particularly true for external teams and stakeholders who do not fall under your regular project cadence.

Next, do a quick assessment to verify if you need to bring forward tasks/action items in your status report.

- Does the task fall in your critical path?
- If the task is delayed, would it possibly impact your project?
- Is the owner of the task an external stakeholder?
- Is the task related to high risk?
- Is the task related to a priority issue?

Ideally, the report should be constructed such that all stakeholders can easily understand what actions are planned in the project for them. At the same time, they should also understand the urgency and impact of the action not being completed in the required time.

Reliability

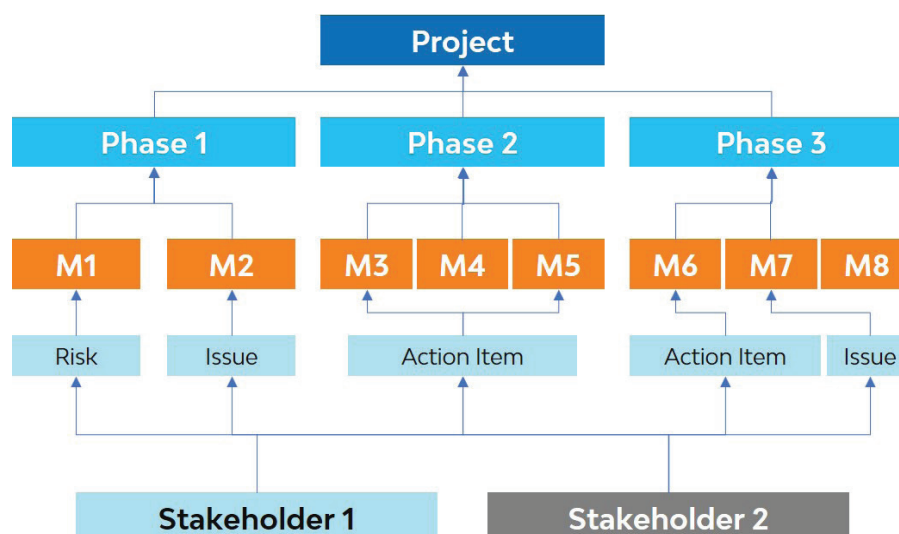
Reliability of reporting needs to be earned, by being disciplined, and by following best practices. The three pillars of ensuring reliability are consistency, discipline, and transparency. These will ensure that your report elicits trust amongst the readers. Remember, you will be dispatching your report at regular intervals, reinforcing its importance for synergy. The following best practices will ensure reliability in status reporting.

Consistency	Discipline	Transparency
<ul style="list-style-type: none"> • Try maintaining the similar timing of the report. • Do not frequently change the format or structure of the report. • Be consistent with the distribution list. • The report title and subject line should be consistent. • Nomenclature should be consistent 	<ul style="list-style-type: none"> • Ensure all links provided in the report works. Double check before sending. • Ensure that you have sufficient details around any KPI • Ensure credibility of the information. 	<ul style="list-style-type: none"> • Avoid jumping status (Green to Red for example). Yellow status gives stakeholders an opportunity to help.

Traceable

While reading your status report your audience should be able to visualize a traceable flow. Keep in mind that you are not publishing your detailed project plan; hence it is advisable to think of the most effective way to build linkages across your report. Expert project managers benefit from using identifiers to link the data across the report.

Here is a visual showing how the linking would leave an imprint on your reader's mind



2. How to structure a status report?

The structure of the report is at the core of its communication performance. This section provides some recommendations and best practices that will help you orient your report to optimize information velocity.

Identity Section

Status reports benefit by publishing the attributes that uniquely identify the document. Typical attributes include:

- Type of report
- Time frame of the report
- Date of reporting
- Names of the project managers who are reporting
- Key Identifiers of the project (ID, name, etc.)

The title of the report and the e-mail subject line are also part of the identity.

The subject or title should clearly define the intent and time frame of the report. Here are some examples.

Common Title	Performance Title
Status report of XXX project	XXX Project - Weekly Status - WNN
YY group status report for WNN for XXX project	XXX Project - YY Group - Weekly Status - WNN

Key Performance Indicators

You can call this the “management block.” Executives depend on the project team to manage the details and understand overall health within 30 seconds. Project managers benefit by understanding the stakeholders’ interests in the project, and then diligently designing KPIs that help them with requested information.

Please refer to the reliability section; you must have solid data to support your KPIs. Here is a sample KPI section from a mock-up status report.

Key Performance Indicators

Overall Projects Scores		Delivery KPIs				Other KPIs			
Overall Project	On Track with managed risks	Requirement Maturity	Project Delivery	Project Speed		Forecast			
Quality	Higher defects 18%			Velocity	165 (+5)	Est. Schedule	17 Sprints	+1 Sprint Buffer	
Cost	\$3.2M (+0.3M)			Std. Dev.	9.79	Est. Cost at Completion	\$31,000,890	\$100K Buffer	
Delivery	On Track			Completed Sprints	3	Est. Schedule (Defect Adjusted)	18 Sprints	No Buffer	
Scope	3225 (+423)			Planned Sprints	10	Est. Cost (Defect Adjusted)	\$3,300,780	\$100K Over	
		Change Management	Project Cost	Project Quality		Risk & Issues		Customer Feedback	
Red Risks	3 - Managed		Baseline	\$ 3,200,000	Total # of Defects	23		# of Feedbacks 29	
Red Issue	2 - Managed		Actual Spend	\$ 845,908	Story Points with Defects	82		Average Scores 4.2/5	
CSI	4.2 (+.2)		Planned Spend	\$ 835,000	Defect Density	18.3%		# of Major Iss. Open 2	
Morale	High		Variance	\$ 10K, 1.1%	Rework Cost	52 SP, \$114K		# of Major Iss. Res. 3	

It is recommended that you socialize the KPI dashboard with your stakeholders before you start incorporating it into your report. Further, it is not a one-time activity, since you will keep on optimizing the report as you learn more about the project and its stakeholders.

Milestone Tracking

This is the myopic view of project performance. This section helps answer the question — how is the project's recent performance in the grand scheme of execution? The recent past (last three milestones) performance and the readiness of the project for upcoming milestones (next three milestones) determine the project's recent performance. Here is a sample view of milestone tracking.

Past three milestones (-3)			Planned three milestones (+3)		
Date	Milestone	Status	Date	Milestone	Status
1/10/2020	Production rollout of Phase 1	On Time	3/15/2020	Production rollout of Phase 2	On Track
2/21/2020	Production rollout of Phase 1.5	2 weeks delay	3/25/2020	Design Completion of Phase 3	On Track
2/27/2020	Design Confirmation Phase 2	3 days delay	3/28/2020	Epics for Phase 4 in Backlog	4 Issues

In this example, when stakeholders read your report, they will receive two critical messages this block is sending:

- The project is back on track after a minor variance on the 2/27/2020 milestone
- The project might need support to firm up the Phase 4 backlog. If this stays yellow for another week or two, stakeholders will reach out to the project manager to extend their support

Schedule Section

Project managers benefit by publishing all the milestones for the project. While designing this section the following points should serve as guidelines:

- The detailed schedule should not exceed 20-30 lines. If stakeholders need to understand the details of the project they can find a link to the detailed plan in your reference section
- The main idea is to show plan vs actual for past milestones and the project's outlook on the remaining milestones
- If the project is complex and divided into many phases, rolling wave elaboration with a focus on the current phase could help(see sample below)

- The collapsed-milestone view of your schedule can also work. However, based on the experience we recommend creating a separate milestones tracker to adapt quickly to any feedback on reporting
- If your project was re-baselined, ensure you mention the date of the baseline in this section

The following schedule formats are simple and widely accepted

- Basic tabular format with some color-coding

Milestone	Milestone Name	Start Dt.	End Dt.	Status
PH 1	Phase 1 Development & Rollout	12/10/2020	1/20/2021	Complete - 15% variance
PH 1.5	Phase 1.5 Development & Rollout	1/5/2021	2/25/2021	Complete - 5% variance
PH 2 (Current)	Phase 2 Development & Rollout	2/20/2021	4/20/2021	In-Progress - Minor Variance
PH 2 - M1	Epics completed in product backlog	2/20/2021	3/5/2021	In-Progress - 4 Issues
PH 2 - M2	Architecture Review & Sign-off	2/25/2021	3/15/21	In-Progress - Minor Variance
PH 2 - M3	Phase 2 - Sprint 1	3/18/2021	3/28/21	Planned - On Track
(All major Phase 2 Milestones)				
PH 3	Phase 3 Development & Rollout	4/25/21	6/25/21	Planned - On Track
PH 4	Business case being evaluated.			

Note: Dates for past milestones are based on actual performance

A plan vs actual are very popular as well. It's not as simple as the previous tabular view, however, many stakeholders feel more comfortable with this view as it visually represents the project performance.

Milestone	Milestone Name	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10
PH 1	Phase 1 Development & Rollout										
PH 1.5	Phase 1.5 Development & Rollout										
PH 2	Phase 2 Development & Rollout										

- You can use the concept of a heartbeat. Ensure that you have socialized the concept before applying it

Mileston	Milestone Name	M1	M2	M3	M4	M5	M6	M7	M8	M9
PH 1	Phase 1 Development & Rollout									
PH 1.5	Phase 1.5 Development & Rollout									
PH 2	Phase 2 Development & Rollout									

The heartbeat line makes status reporting very simple and elegant by visualizing lags and leads with bends indicating accomplished marks.

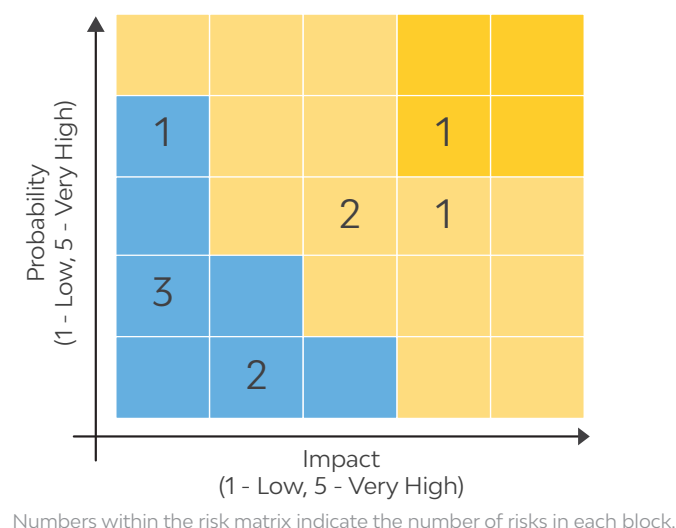
Risk and Issue Section

The Risk and Issue section needs to be simple. However, it must convey the control you, as project manager, will have over uncertainties. It is good practice to highlight only high-priority items here, rather than providing a laundry list (unless it improves traceability).

Risk management complexities may vary based on your project. However, the status reporting needs to be simplified, to ensure optimum communication velocity. The following is a minimalist reporting template:

Risk #	Risk Description	Probability	Impact	Score	Owner	Status
R001	Based on similar architecture servers choke at 1000 hits/min.	High(4)	High(4)	16	QA Team	Reduce Risk
R002						

In most organizations, risk management is a strong differentiator of project management capabilities. A secondary visual summarizes the risk situation of the project, helping the stakeholders to easily comprehend risk assessment. As an example, the Risk Matrix has proven to be an effective communication tool.



The Risk Matrix has been leveraged in NASA for decades and has served as a highly effective risk management tool as well.

Issues and Action Items

Issues are problems that are real now, and the project team is trying to de-escalate their impact. The middle management always wants to be aware of how they can extend their support to the project.

The key is to plan communication that enables the assigned stakeholder with relevant information to take appropriate actions. The basic inputs that are helpful for action items include, but are not limited to

- When was the issue reported?
- What's the priority of the issue?
- Who is assigned to manage the issue?
- When do you think the issue is going to be resolved?

Project managers benefit by consolidating the overall action items. This allows the stakeholders to review a dedicated section to understand how they are being requested to support.

ID	Type	Item	Priority	Owner	Due By	Health	Linked Ref.
1	Risk Reduction	Load testing of 1000 hits per minute to resolve risk R1001.	High	QA Team	DD/MM	On Track	R001
2	Task Dependency	Table design review by performance team.	Medium	Architect Name	DD/MM	No Feedback	

Appreciation

This is a much-ignored aspect of status reporting. Seasoned project managers never lose an opportunity to appreciate a stakeholder. There may be a more formal reward system, and you can include it too, but this section offers the project manager an opportunity to thank stakeholders.

It could be a basic tabular representation such as this

Resource	Appreciation Note	Date
John Doe	Resolved the performance issue of the NNN report. It now loads the report within 1 second from the previous 2 minute load time.	MM/DD/YYYY

References

Yet another ignored aspect of status reporting is references. While drafting status reports project managers refer to many artifacts such as Risk Log, Issue Log, Milestone Chart, etc. It is good hygiene to provide appropriate links to artifacts used.

Document Name	Document Link
Risk Log	https://linktodocument1.reference.com
Issue Log	https://linktodocument2.reference.com
Abbreviation List	https://linktodocument3.reference.com

Note: It is highly recommended that you maintain an abbreviation list, and link it for easy access.

Conclusion

The tools used for status reporting may vary, but the focus of this article is to help project managers align reporting fundamentals with stakeholder expectations. Status reports help reinforce project management excellence in a periodic manner. This opportunity, if leveraged appropriately, can create the most valuable asset in return, one all project managers aspire for: stakeholder trust.

About the Author



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Since 2001, Manojee has been architecting solutions by decoding complex business problems and ensuring optimum value realization. He executed multimillion-dollar global programs in a highly diverse environment and pioneered transformation through digitization and innovation. He led agile adoption by architecting tailored, adaptable processes and standards to support a transformation journey of many organizations.

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