Running the Project

No matter what size or type of project you are involved in in or managing, there is inevitably a status report required and update or steering meeting planned regularly.

There are numerous sources and recommendations of format, content, and process of project status reports but organizations have their own preferences when it comes to style and format, but the essentials don't really differ from company to company.

The project status report must have a purpose. The first question to as is "Why?" What is the audience? How often are updates required and to what level of detail?

Some PMO (Project Management Offices) in organizations sleep-walk with their various templates and formats for these reports but ideally, they should be reviewed regularly. There is no one size fits all Project Report template that will suit all projects. In order to remain fresh and relevant, there should be an active process to review presentation templates as the needs of the business and projects dictate.

At the beginning of a project we often sit down with the main stakeholders and give them the opportunity to have some input into the project update meeting. Be cautious here not to let them influence it too much. As the project manager you need to be in control. This is however a useful PR exercise as you are being seen as engaging with your stakeholders and customers, this is great for building strong relationships.

The project status report is an essential element of Project Governance and control. Typical contents can include but is not limited to:

Current Status against Plan
Recent Activity
Planned Activity
Budget Performance
Resource allocation
Risks & Challenges

Within these headings all areas of the project can be discussed.

In addition to a communication of status this is also an opportunity to high-light any areas of concern and seek guidance, advice or support in the resolution of issues. When dealing with a rescued project it is very important to focus on the areas that caused the previous projects to fail. It is recommended to have a specific metric or focus point to be discussed at each update to indicate that the project is not going to suffer from the same issue that caused it to fail in the first instance.

For example, if the failed project suffered from poor communication, you need to demonstrate that communication is being monitored is recognized as being more effective in the renewed (rescued) project phase. This can be done by holding a review of meetings and communication either by a survey or a vote at the end of each meeting to hold all contributors accountable. Ask for feedback at each stakeholder update on how they feel communication is performing. If you receive feedback, positive or negative, embrace it and learn from it.

As another example if the original project failed because design documents were not completed on time, present a metric that clearly displays how design document completion is performing against target dates. i.e. record the actual dates against the target date. How is the project team performing in this area? Does adequate monitoring exist that would provide and early warning of a risk in this area long before it becomes an issue.

Keep in mind that when projects fail, they fail gradually at first and then suddenly. If we look close enough potential risks will seem obvious in hindsight.

This may seem obvious, but these meetings work best when a policy of openness and honesty is adopted.
Regular status reporting is necessary to be an effective means of communicating on all aspects of the project. It helps to maintain traction and visibility for the project. The frequency of reporting is often a function of the duration of a project and its importance to an organization. For projects with a short duration (i.e. less than six months), it is better to have weekly reporting so that issues are raised and dealt with sooner. For projects with a longer duration, bi-weekly or monthly reporting may be more suitable or desirable. As the project nears and end or a period of high activity the frequency may increase somewhat as required to manage that activity.

Project Report Content

When preparing the content, think for a minute before just blindly filling in the detail. Look for the reasons why the stakeholders may want certain information included in a report.
What is the next significant milestone?
Are there any blockers in the way to achieving the milestone?
Is the process to achieve the milestone fully understood?
Where there any contentious issues at the previous meeting – have they been resolved?

Remember that a project has been set initiated by a business to assist the business in achieving objectives or to reduce risk or resolve an issue. Always try to gear the project update into how close you are to making those business objectives a reality. This would by “Why” the project was initiated in the first instance.

Is there any important factor that needs to be discussed that is not included in the regular format of the project update meeting?
Be sure to raise it. If you are going to raise an issue it is always a good idea to have a solution or proposed way forward to present for the stakeholders to approve.

Delivery of the Project Status Report

The delivery of the Project status report is generally in the form of a meeting. These can be face to face meetings or web-based meetings. Both have their advantages and drawbacks.
Face to face meetings are a great way to engage and build strong relationships. You can read the facial responses and body language and adjust your presentation to suit.
Web meetings force people to stick to an agenda and provide each participant with a specific time slot – but talking over each other can have a negative impact on the meeting.
It is important to be clear and concise on all points to which you are presenting. Do not say anymore that you must on any point. You may have someone in the audience who is out to impress and you or a project you are working on could be their target.
Limit your answers to yes or no and keep the detail to a minimum.
If you have some items you are uncomfortable discussing – then start with these and prepare a position on each of them. i.e. – What would you not like to be asked?

Format of the Project Status Report

Typically, most organizations will utilise a format or a template whereby it is required to complete certain fields weekly for presentation to a steering team. If the customer and the audience are new to you, it will always take a bit of time to get used to company jargon and pinch points. Don’t consume yourself too much with the template being used. This is unlikely to change in the short term so make your content suit the fields in the template. Too often I see Project managers complaining and wasting time on the report template when it is fixed and not changeable. Focus more on the facts of your project. You can always add in a comment verbally at the end of your presentation if needed. If you are asked to create a format then let the facts shape the format, do not let the aesthetics of a neat format guide your update.

In Summary – Project Updates

1. Preparation is Key.

As the meeting will typically be weekly or fortnightly. Do not only build the meeting into your calendar, put time in the calendar for the preparation required to ensure the update is accurate concise and to the point.

2. Ensure your Finances, Risk Log and Activity Records are Up to Date.

This is all standard work for a project and most organizations are well structured to provide you with up to date information. Regardless of the customer, you will still need to maintain some financial records yourself to ensure that everything is on track. Many organizations have excellent systems for recording financial transactions but sometimes the reporting systems can be cumbersome and not fit for purpose. Insist on accurate reports. This will keep the financial people on side.

3. If needed – speak to one or two of the stakeholders in advance of the update to float any potential sticky items past them.

Challenges will pop up on every project, particularly software projects. When faced with an unexpected issue, engage with the stakeholders early in the process. Try to speak face to face, if not try by phone and as a last resort by email. Stage the call carefully. Always pitch this as "asking for advice". Start the call with "I need your advice on how to....". If they have been speaking to you prior to the meeting they are likely to be on your side and helpful at a difficult update. If new information surfaces on the update call and they have not had a chance to process it, the outcome is normally negative.

4. Rehearse your Update in Advance (if you are expecting to deliver bad news – rehearse with a colleague)

For new updates or challenging updates, rehearse, rehearse, and rehearse. It may be useful to engage the help of your most cynical colleague or peer who can prepare you for the worst or practice difficult questions.

5. Be Frank, Open and Honest.

Stick to the point. Deliver your message (good or bad) in brief simple terms with no exaggeration either way. Leave everybody in no doubt as to the nature and accuracy of the update. The best outcome you can have at a project update is no comments. i.e. When you deliver the update you should ask - "Any questions." If your update is clear enough and you have prepared for the difficult updates there should be no questions.

6. Address any questions with short closed precise answers.

If you are asked any questions (and on many occasions you will be asked questions), keep your answers brief and clear. Short concise responses such as "Yes", "No", or a specific number or date followed by silence are the ideal types of responses. Never feel the need to fill the silence. You may encounter a situation with senior ranking people on the call where someone will feel the need to break the silence. Try not to be that person. If there is nothing to say, say nothing. Let someone else move the meeting on - e.g. the chairperson.

7. Don't be afraid to ask for advice and Support.

This is one of my favourite aspects of delivering projects and programmes in large organizations. Too often the leadership team within an organization will keep stating " If I can help or support you in anyway, please let me know." I ask for help regularly at the update meeting, It will have one of two outcomes. You will either get the help you ask for or you will learn who is being sincere in their offer of help.

8. Remember as soon as a project issue is identified – you can commence to work towards a solution!

Like any problem, once it is recognized that there is a problem (and on large software projects there are always problems), you can begin the remediation process. Before you present to your customers or stakeholders that you have an issue, make sure you have a solution in mind. Even if this is a draft solution it will demonstrate that you are thinking ahead strategically. In many cases once an issue is made known the solution present is itself. Some issues however may not be as obvious and will require further thought or analysis.