

Harnessing the power of effective reporting

A Tregaskis Brown LinkedIn Series



Andrew Logie

Are you getting the most out of your project reporting?

Effective project reporting is a critical component of a Project Manager's toolbox and can have a significant impact on whether a project is delivered successfully. However, it isn't as simple as filling in a template and for many Project Managers getting reporting right can be a real challenge.

In this third of our four-part series 'Nailing the project management must-do's', we will highlight the importance of project reporting and provide some useful insights to help Project Managers:

1. Get the content of project reports right
2. Present reports effectively to provoke good quality discussion amongst the audience and enable informed decision making.

Why is reporting so important?

Effective project reporting is a critical component to the success of a project. Reporting:

- Provides a critical, formal audit trail of the project.
- Enables the Sponsor and governance group (project boards or steering committees)

to monitor and govern the project effectively so it delivers what it set out to achieve. Good reporting will enable these groups to make adjustments and corrections before small variances become major issues.

- Helps shape good quality conversations with the Sponsor and governance group, whilst also providing a key component of the first line of assurance for the board.

Getting the content right

Project reports provide the Sponsor and governance group with a point in time snapshot of the current and forecast status of the project. A good report will include:

- Actual and forecast status against the plan (time, cost, quality).
- Progress towards delivering any new capability and expected benefits.
- The critical issues requiring Sponsor and governance attention.
- Key risks
- The significant milestones ahead for the project over the next period (often the period between reports)
- Key decisions required from specified decision makers such as the Sponsor.

Configuring the content of your reports is critical to ensuring timely and effective management and monitoring of a project.

Below are some key tips on how you can get the content right.

Keep it simple

People are often time poor too, so don't drown them in pages of reporting. It can distract them from what really matters and bog down conversations in unnecessary detail. Less is usually more, so keep your reports succinct and focused on what will help the project succeed most. This doesn't however excuse the need for detail, so it is critical that you're across any supporting information.

Iterate over a project's lifetime

Be cognisant too of the need to iterate your reporting over time. The frequency and format of reporting should reflect the level of control required over a project, which can vary over its lifetime. You therefore may need to adjust reporting to meet changing information needs. For example a project with a large number of frequent milestones may require more frequent reporting, as more things can change or impact the delivery of the project.

The key thing to remember is that you continue to provide the core information outlined above that best supports the Sponsor and governance group monitor and govern the project effectively. Any additions to the core information should be discussed with the Sponsor (e.g. addition of a stakeholder engagement section).

Less of the news and more of the weather

One thing that separates average reporting from great reporting is how forward-looking the report is. Whilst it is important to recognise past performance, it provides limited value as the Sponsor and governance groups cannot influence the events that have already happened. Forward-looking reports are highly effective in identifying and managing issues and risks early so that the Sponsor and governance group can act early to remove potential roadblocks that may become a hindrance.

Be transparent

Information in your report should be accurate, timely, objective and complete. The Sponsor and governance group should operate on a 'no-surprises' basis. Beware of falling into reporting what you think the Sponsor wants to see ('watermelon projects') where the status is reported as on track ('green') when in reality it is in trouble ('red'). This can cause more issues for an organisation and require more resources to resolve than had the initial issue been highlighted early on.

Any issues or emerging risks identified need to be accompanied by any corrective actions already taken as well as advice on what else might be required to move the project forward. This supports the Sponsor and governance group make key decisions and gives them confidence in a Project Manager's ability.

Presenting reports effectively

Getting the content of your report right is critical to harnessing the power of effective reporting. But one step which is often overlooked, is the physical presentation of that report to an audience.

Project reports are a communication tool and they should anchor productive conversations and provoke insightful questioning and enquiry from the readers. As the author of the project report you should expect to present it to the Sponsor and governance groups, so here are some useful tips for effectively presenting reports:

Focus on the key points of the report

Assume the report is read, but also reintroduce the key conversations you want to have with the audience. Is a decision required? Are you providing them with assurance? Or are you highlighting a risk to the project? Shape the conversation around the areas where the audience can add value. Be forward focused, discuss next steps and highlight what is required of the audience in the future.

The three *whats*.

When you are presenting your reports, it is useful to think about structuring the conversation around the three *whats*:

What?

The *what* is the situation, issues, progress or risk ... the thing that has happened or might happen. For example: The Business Analyst has resigned from the organisation and is no longer part of the project.

When presenting your report, describe the situation or problem, the key facts and provide evidence to support it.

So what?

The *So what* is the impact on the organisation, the project, a customer or a stakeholder ... the implications of the *what*. For example: The departure of the Business Analyst means the project no longer has the expertise required to complete this phase of the project.

When presenting your report, describe the consequences, why it matters and what the evidence tells us.

Now what?

The *Now what* is the required action, a decision, a change, a communication, a new resource etc. the response to the *what*. For example: The Project Manager is seeking approval to engage a contract resource for a cost of \$50,000 to replace the departed Business Analyst. This will allow the project to progress without significant delay.

When presenting your report, describe what needs to be done and what decision is required.

Engage others before seeking a decision

Decision makers will require assurance that you have sought the views of key stakeholders and reflect these views in your report - so don't produce your report in a vacuum. Verify your report findings with evidence and draw on the support of your project team who can help ensure the report is accurate and complete. There may be some nuances to the project status that can be presented or interpreted in many different ways, so it pays to back up your findings.

Be prepared

Create a brief discussion plan to ensure you don't forget the key points and to avoid over-talking.

Put yourself in the decision makers shoes - think about what they will be interested or curious about and prepare your responses.

Although your report will be succinct, have more detailed information to hand and be prepared to speak to it should someone want to do a deep dive.

Physical presentations can also be used to update the audience on any key changes that have occurred between the report being produced and the meeting. Don't wait until the next reporting cycle if something will materially impact the project.

If, you or your project team want to update or improve your project reporting methodologies, contact Tregaskis Brown. We have a wealth of experience and expertise in both project management and governance and can help you navigate towards success. It all starts with a conversation.

You can also find a range of project management resources on [our website here](#).



About the Author

Andrew joined Tregaskis Brown as a consultant in December 2018, after completing a Bachelor of Commerce, Majoring in Accounting and Finance, and Minor in Commercial Law.

During his time at Tregaskis Brown, he has been involved in developing reporting frameworks, systems and dashboards for organisations such as Manatū Taonga and APEC New Zealand.