Progress Reporting Revisited

One of the first columns I wrote for *PM File* dealt with the preparation of project instructions and progress reports (see “Simple Communication Tools Drive Project Success,” *EM* April 2007, p. 30). Seven years on, as I prepare this column and reflect on recent projects, I remain convinced that these two simple communication tools can eliminate many project problems because they prepare the project team for success and keep stakeholders apprised of important project developments.

I recently had the opportunity to work with an air pollution control device (APCD) manufacturer who recommended our firm to their client to gather data to support system design. The scope of the project was straightforward: measure pollutant concentrations at four locations simultaneously for 30 days using continuous emission monitoring equipment and provide data to the emission source and APCD manufacturer in real time. Indeed, this was the scope of work. However, what we didn’t understand was that the design study was being conducted to satisfy a consent order and that a competing control technology would be evaluated after the initial study, two factors that constrained the project schedule.

As it turns out, the source had problems in getting ready for the test, the APCD manufacturer that recommended us had problems with startup of the pilot system that would be evaluated, and we had minor problems in producing real-time data when the pilot started. Our project manager had access to much of this information and communicated regularly with the plant contact who had retained us for this project; however, those communications were not shared openly with other stakeholders. As a result, tempers flared. Caught between the source and the APCD manufacturer, we were the common denominator in project delays even though we were responsible for only one of the six delay days—a day when both the source and APCD manufacturer were properly operating. At that moment, our performance appeared to be the problem.

What could we have done differently? Two things. First, we could have done a better job of understanding the project requirements that no one wanted to talk about. In short, we could have recognized all stakeholders and done a better job of managing stakeholder expectations. We would have had a clearer understanding of the time constraints surrounding the project and we may have understood that another pilot treatment device was scheduled for trial after we completed this initial study. Honestly though, our client was under no obligation to share this information with us. We were hired to generate data under certain study conditions, subject to agreed-upon quality.
specifications, that the client would use to make investment decisions.

Second, and more important, we could have communicated what was happening by using progress reports. Although the client may have chosen to disclose only certain information to us, we had full control of disclosing project progress to our client. We knew there were process problems that delayed the project. We knew there were pilot system problems that delayed the project. And we knew that startup of the pilot system fouled our sample collection equipment. A simple progress report—delivered in writing—that objectively stated the issues surrounding project execution would have kept everyone informed and eased the tension when project progress seemed doubtful.

**Progress Reports Keep Everyone Informed**

The ongoing demand of project management makes it easy to neglect the communication needs of project stakeholders. And in some cases, despite our best efforts, we may not be able to identify all stakeholders and their specific needs. Although the project manager and project team are busy working to meet the needs of stakeholders, stakeholders may not be aware of project progress, challenges, or evolving factors that affect a project’s outcome. Stakeholders are often involved with many projects making it difficult to remember the details of verbal conversation. Progress reports from the project manager can help stakeholders and the project team remain on track to deliver a project that fulfills requirements.

Stakeholders need to be kept informed about project status, even when the project is progressing satisfactorily. Written project status reports, delivered at regular intervals or at major milestones, are excellent tools to keep stakeholders informed and build their confidence in the project team. In the absence of specific status reporting requirements, project status reports should generally include:

- a summary of accomplishments during the reporting period;
- planned activities for the next reporting period;
- anticipated requirements from the stakeholder;
- problems encountered and resolution plans;
- cost or budget information; and
- schedule information.

The format and frequency of project status reports will vary with the size and scope of the project and the needs of the stakeholder. An e-mail version, delivered at regular intervals, might be appropriate for a permitting project that incurs regular effort over an extended period. The project manager may use this approach to keep stakeholders informed of project progress, data gaps, effort incurred, and developments that might affect permitting strategy. Alternatively, milestone-driven reports may be more appropriate for discontinuous projects such as studies. In the case of our project, a daily project status report submitted by e-mail would have provided the documentation needed to avert problems.

Although our first objective should be to thoroughly understand all of the details surrounding a project, the reality is that in a world that demands increasing specialization, we may only have a narrow view of the project and its purpose. In these cases, our project progress reports can keep the broader group of stakeholders informed, heading off questions and problems that detract from our narrowly focused goal.