Project Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Template Instructions:

A project status report could be defined as a regular report that states the up-to-date project progress and compares it with the project plan. It also serves as the primary communication tool to convey critical messages to the right people at the right time and with the right format. The project status report helps monitor, manage the project, and provide documentation for future project improvements.

When creating a status report, it is imperative to use the stakeholder register and the communication plan to assist you with who needs to be informed. With what information? When? And in what format? These questions help to organize and formulating the report and maintain stakeholder’s expectations. Since many like a visual indicator, blocks containing “<c>” should be filled with red, yellow, or green to indicate an agreed on status code.

The project status report format may vary by the audience. Senior management requires a high-level status report, while a more detailed status report may be needed for the project team. This template leans more toward executive reporting. Agile projects may also be new to many executives, so try to keep agile jargon out of the report as much as possible. An exception may be made for some key metrics, which are explained with the first report. When agile becomes more common, introduce more charts, like the burndown chart, to show progress. Keep it simple and straight forward, and as the book points out, “watch your bark.”

To begin with, identify the name of the project, the report date, the sponsor, and simply ask these three questions: What have we accomplished already? What are we going to do next? And what problems/challenges/opportunities are we facing?

Provide a short and concise summary of the up-to-date project progress and highlight the schedule, budget, and issues with green, yellow, or red colors in order to indicate the status of each. Green indicates that the project is on track, yellow indicates that the project has some issues or delays, and red indicates that the project is at risk.

Next, list the major milestones from the current period. It is essential to select only those milestones that are of interest to the subject audience or stakeholder. Executive stakeholders tend only to want to know whether or not the project is on track. Again, keep it simple and to the point. Describe what the milestone is and what date it is expected to be finished. Provide the current status of each milestone and the owner of each milestone. The owners are responsible for providing the project manager with updates for the milestones for which they are responsible. Also, give a short yes or no answer to highlight if any particular milestones have issues or not. Use the comments area to write down any comments or notes as necessary.

In the project risks and issues status reporting area, provide the major risks and issues the project is facing. Indicate the priority level of each risk or issue followed by describing what impact each risk or issue has on the project. Provide action steps on how to move forward in dealing with each one and always make sure there is someone is assigned to followed-up and provide feedback for those issues – the owner. **Note: An issue should never appear here for the first time – there should be no surprises. Schedule a meeting with the client, project sponsor, or others as necessary to discuss issues before adding them here.**

If there is a budget, provide the amount spent to date and the amount remaining.

Next, provide some of the key agile metrics, such as burndown rate and velocity

The last part is dedicated to whether or not executive help is needed for any particular situation. Describe the issues that require some help and what is the proposed actions to solve or mitigate those issues. It is always important to ask for help if assistance is required.

**Note: it is advisable to tailor any report to meet the stakeholder’s expectations and information security. DO NOT share confidential information with the wrong stakeholders. If possible, use graphs to visualize data better.**

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Manager:** |  | | **Sponsor:** |  | | **Date:** |  |
| **Project Progress Summary** | **Schedule** | **<c>** | **Budget** | **<c>** | **Issues** | **#** | **<c>** |
| **Summary:** | | | | | | |
| **Project Milestones** | | | | | | | |
| **Milestone description** | **Expected date of completion** | | **Status** | **Owner** | **Issues (yes/no)** | **Comments** | |
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| **Project Risks and Issues** | | | | | | | |
| **Risks/Issues** | **Priority** | | **Impact on project** | **Action** | | **Owner** | |
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| **Budget** | | | | | | | |
| **Budget Spent (%)** |  | | **Remaining (%)** |  | | **Status** | **<c>** |
| **Sprint Metrics** | | | | | | | |
|  |  | |  |  | | **Status** | **<c>** |
| **Executive Assistance And Issue Escalations** | | | | | | | |
| **Assistance Needed/Issue Description** | | | **Action Requested** | | | | |
|  | | |  | | | | |

Pre-filled example:

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| --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Manager:** | Siwan Sero | | **Sponsor:** | Dennis Miller, Jim Carrey | | **Date:** | 11/20/2020 |
| **Project Progress Summary** | **Schedule** |  | **Budget** | N/A | **Issues** | 10 |  |
| **Summary:** The project overall is making good progress. Some missing user stories were found when putting together the product backlog, but there are none affecting the current sprint and we will correct within the next two sprints. | | | | | | |
| **Project Milestones** | | | | | | | |
| **Milestone description** | **Expected date of completion** | | **Status** | **Owner** | **Issues (yes/no)** | **Comments** | |
| Functional Requirements | 10/16/2020 | | Completed | Siwan | Yes | Missing user stories (10) | |
| Product Backlog | 10/30/2020 | | Completed | Jim, Siwan, Team | Yes | See above | |
| First sprint | 11/20/2020 | | On-time | Jim, Siwan, Team | No |  | |
| **Project Risks and Issues** | | | | | | | |
| **Risks/Issues** | **Priority** | | **Impact on project** | **Action** | | **Owner** | |
| Missing User Stories | Medium | | None expected | Siwan is working on them | | Siwan | |
| Sally taking vacation | Medium-High | | Work of 3rd sprint may not be met | Adjusting sprints and milestone plan; per Jim, this won’t be an issue | | Siwan | |
| **Budget** | | | | | | | |
| **Budget Spent (%)** | N/A | | **Remaining (%)** | N/A | | **Status** | N/A |
| **Sprint Metrics** | | | | | | | |
| **Burndown Rate:** | Too early to measure | | **Velocity:** | Too early to measure | | **Status** |  |
| **Executive Assistance And Issue Escalations** | | | | | | | |
| **Assistance Needed/Issue Description** | | | **Action Requested** | | | | |
| None at this time. | | | None at this time. | | | | |