The Art of Communication

One of the keys to the success of any project, program or portfolio is proving senior management with an appropriate level of information about the progress of the program, and its projects, so that they build and retain confidence in the management thereof. Where this confidence is not built or maintained, senior management has the tendency to seek/require greater levels of information about the portfolio/program/project and, in essence, seek to micro-manage the activity. This imposes a significant management overhead on the project/program/portfolio management team as they struggle to present and explain the import of all of the detailed information.

The key is to get the right balance in communicating portfolio, program and project performance to the senior management.

The figure below shows the typical reaction of senior management depending on the level of detailed information first presented to them.
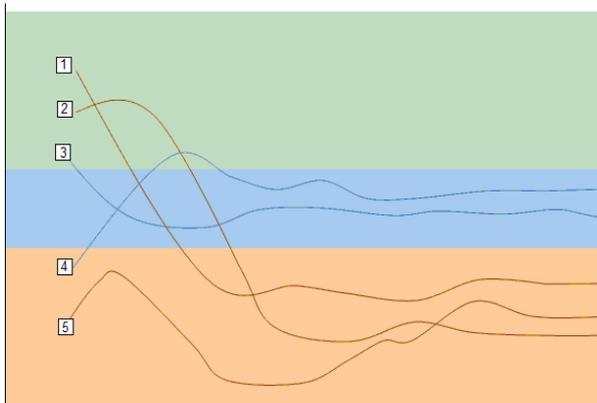
Line 1 depicts the situation where the level of information is too high level and the program board quickly looses confidence and seeks/requires detailed program/project performance information.

Line 2 depicts the situation where the program board initially accepts the high level information presented to them, perhaps based on other confidence factors such as the reputation of the program manager, but looses confidence over time and seeks more detailed information.

Lines 3 and 4 depict situations where the information first presented the program board is 'about right' for the program board and the level of information presented/required varies little over the duration of the program.

Line 5 depicts the situation where the level of information first presented to the program board is detailed and the program board learns to accept this as the norm and resists attempts to raise the level of the information presented

The most efficient and effective communication occurs where, like in the situations depicted by lines 3 and 4, the project/program/portfolio manager picks the right balance of information for that group of senior management at the first instance.

The **art of communication** is predicting what will be an acceptable depth and frequency and mode by which progress information is provided to senior management.

Now it is not possible to provide a generic solution as each group of senior management will be different, here are some tips.

1. regardless of the senior management group you will need to provide planned verses actual performance information for schedule and scope. This information should be provided to the first sub-entity level and no further. That is:

    * for portfolios, the information should be provided at a summary level for each component program(me) and stand-alone project (but not for projects within a program(me))

    * for program(me)s, the information should be provided at a summary level for each component project (but not for each deliverable within each project). For some Senior Management groups you might consider including sub-project phases (eg. design, build, verify)

    * for projects the information should be provided to the first WBS level (ie. to the deliverable level).

2. place yourself in the shoes of your senior management group members and noting their project management maturity, risk adverseness and even their available time to assess what additional information they would need to develop and maintain confidence in the performance reporting of the project. Typically senior management groups require information on:

- reasons for any variations between planned and actual costs and schedule;

- any significant risks; and

- any significant issue.

3. consider means by which a lot of information can be presented in a single, comprehensive picture. As they say, a picture is worth a thousand words

    Some examples of this concept are below.

Progress Against Plan

Whilst the presentation of a detailed, multilevel Gantt chart is too detailed a means of communicating progress with program boards, the presentation of a simple trafficlights view is similarly inappropriate because of lack of detail about progress over time.

A balanced approach could be through the use of simplistic yet very effective progress graph that plotted actual reported progress against planned/expected progress
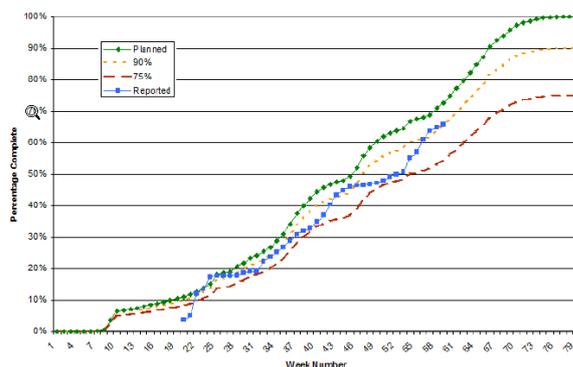

In a single view, this graph provides senior management members with:

- current reported level of completion (blue line) against plan (green) and tolerances (amber and red);

- past performance against plan and tolerances;

- performance trend, as indicated by the slope of the reported level of completion; and

- the amount of improvement required to get the performance back within acceptable/ tolerable levels.

At one level more detail, the following presentation could be used.
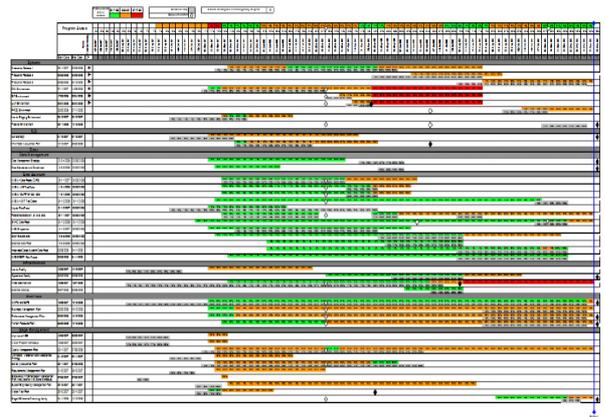
In this presentation:

- each first level de-aggregation (eg. projects for programs) is represented by a single row;

- the planned percentage complete is provided for each item for each week or reporting period.

- once a progress report has been prepared the actual percentage complete for each project is entered and colour-coded appropriately.

In a single picture, senior management members are informed:

- when each project is planned to start and finish;

- the progress of each projects;

- which projects are in trouble; and

- which projects have always been in trouble and which have only recently become so.

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Risk Profile

Whilst it is common for projects to report their Top 5 risk this only provides part of the picture and senior management groups often call for more information. Their main concern being are the risk being accurately classified or is their a large bubble of risks sitting just below the surface.

The following graph quickly dispels their concerns and maintains confidence without the need to provide copies of the project's risk register and have the senior management group question each risk line-by-line.
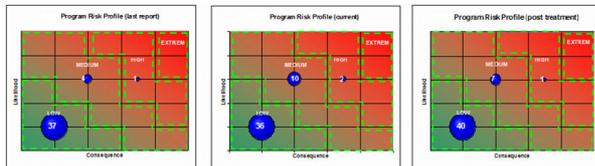
This series of graphs shows the distribution of all active risks by level:

- as previously reported to the program board (left);

- as currently (centre); and

- as forecast if all mitigation plans achieve their expected outcomes.

In a single view, this series of graphs provided senior management members with an appreciation not only of the overall risk profile of the project, but also the forward projected risk profile and the expected effectiveness of the planned mitigation strategies.

Hierarchical Reporting

In a portfolio management environment it is possible to provide hierarchical reporting, with each level providing more depth, so that the senior management group members can 'self-service' their information needs.

Under such an arrangement senior management members could login to the reporting tool and be presented with the portfolio dashboard. Selecting and 'clicking' a single entry would open up the program(me)'s dashboard. Finally, selecting a component project would display that project's latest progress report.

Provided it is appropriately set up all three levels of reporting can be done automatically thereby reducing the portfolio management overhead…and it doesn't require an expensive PM Tool either. P3 Management Services has previously developed such tools using MS Excel™