Self-Service Reporting
making communication easier

Context

In a separate paper *The Art Of Communication* P3 Management Services suggested that there is an optimum level of information to be conveyed by Project Managers to their senior executive. That paper pointed out that project/program managers had one opportunity to get the balance of communication right or otherwise be over-burdened with reporting requirements and senior executives who wish to micro-manage programs and projects.

But what if senior executives could determine for themselves what data they needed to gain and maintain confidence in the management of a project, program(me) or portfolio?

Self-Service Reporting

P3 Management Services suggests that an organisation's portfolio management tool incorporate a hierarchical structure of information that enables senior executive to 'drill-down' on specific projects. At the same time this tool would double as the project manager's project management information system for the tracking of schedule, costs, resources, risks, issues and changes.

The hierarchical levels would contain the following information:

1. list of projects and their current status;

2. description of a the selected project together with a summary of:
   - progress (eg deliverable completed this period and deliverables due next period)
   - finances;
   - risks (top 5);
   - issues (top 5);
   - open change request; and
   - benefits realisability

3. access to detailed information such as:
   - Gantt chart;
   - risk log
   - issue log
   - change log
   - project team and their assignments

As was the case in The Art of Communication a balance of information needs to be achieved at each level. The aim of each level is to sate 80% of senior executives' information needs.

Level 1 – Portfolio/Program View

It is P3 Management Service's contention that senior executives are now more conversant with project management principles and that a simple listing of projects together with the red/amber/green status is no longer sufficient to sate their information needs at this level. P3 Management Services suggests the following, more comprehensive and informative five part status indicator.

 This indicator not only shows the overall status of a project but also the status of each of the four elements of the *steel tetrahedral**

Each of these four elements would be coloured using the 'standard' red/amber/green status colours. In this simple graphic senior executive are informed not only of the overall status of the project but also which of the four key performance indicators are influencing the overall project status.

Below are some examples of how this would appear in practice.

	represents an approved project that is not yet due to commence
	represents a project that is on track and set to achieve all benefits and outcomes on time and on budget
	represents a project that is still OK but experiencing time pressure (but still within tolerance) that could affect the return on investment (or benefits) of the project
	represents a project that is slightly wayward (but still within tolerance) because of cost pressures that may affect the return on investment
	represents a project in trouble overall because of cost over-runs, schedule slippage and reduced deliverables

Level 2 – Project View

Having viewed the list of projects with their five-part indicators, a member of the senior executive might choose to review the status of one of the project's they sponsor or a project whose indicator suggests more investigation is warranted.

P3 Management Services suggests that this level contain:

☞ a summary of the project including:
   - the problem to be overcome/opportunity to be capitalised on;
   - the outcome to be achieved; and
   - the expected benefits to be derived

☞ a narrative on the status of the project at that point

☞ the actual progress to date verses the planned progress to date together with planned and expected completion dates. Where the Level 1 time indicator is other than green, this level should include a narrative as to the variation

☞ the actual expenditure to date verses the planned expenditure to date together with budgeted and projected cost at completion. Where the Level 1 cost indicator is other than green, this level should include a narrative as to the variation.

☞ a listing of open change requests awaiting approval together with a narrative on the combined effect of all changes to date

☞ a narrative on the achievability of the expected benefits

☞ a list of the top 5 risks, their rating and summary of the risk treatment;

☞ a list of the top 5 issues, their ratings and summary of the resolution plan

A possible Levels 1 and 2 is depicted in the mock-up to the right.

Level 3 – Detailed View

If a member of the senior executive needs further information about performance he/she could drilldown to view:

☞ a Gantt chart or equivalent in Time is an area of concern;

☞ expenditure profile if Cost is an area of concern;

☞ the full Change Request Log if Scope is an area of concern;

☞ the full risk register/log if the over risk rating is high or he/she wants to see the details behind a particular risk; or

☞ the full issue register/log if the overall issue rating is high or he/she wants to see the details of a particular issue.

As one can see, senior executive can self-serve their reporting needs from the information project managers would normally keep thereby increasing transparency, and therefore confidence, without increasing the reporting burden for project managers. Balance is maintain but communication is easier and improved.