



WHITE PAPER

# THE BASICS OF PROJECT STATUS REPORTING

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# Table of Contents

3	<b>Executive Summary</b>
5	<b>The Role of Status Reporting in Project Success</b>
9	<b>Status Reporting in Project-Oriented Organizations</b>
10	Five Questions to Ask Before Setting Up Reporting
13	Roles and Responsibilities
17	Reporting Plan
20	Project Status Reporting Maturity Model
23	<b>Conclusion</b>
24	<b>References</b>
26	<b>About the Authors</b>

# Executive Summary

Information is a valuable asset and one which often plays a key part in so many areas of our lives. Those who have the right information at the right moment are better equipped to plan, speculate, produce accurate calculations, and then act accordingly. And this is especially true for project work.

Formal status reporting as a way of communicating clearly and regularly about what is happening with the project often becomes a factor determining whether the undertaking ends in success or failure. But despite this, project management literature, up until now, has largely failed to treat status reporting as anything more than a side note. The purpose of this white paper is to address this gap by providing a comprehensive overview of the subject.

In what follows, the various elements of status reporting are discussed, with a particular focus on the purpose of project status reporting, the roles and responsibilities of people involved in reporting, and the efficient implementation of processes. Furthermore, this white paper introduces a project status reporting maturity model that provides an effective framework for the assessment of project status reporting in an organization.

As such, the document is intended for project management professionals wishing to establish effective reporting processes from scratch as well as for those who seek to advance in their current practice. Whatever the case may be, we deem it is never too late to review the basics.

# **THE ROLE OF STATUS REPORTING IN PROJECT SUCCESS**

# The Role of Status Reporting in Project Success

Project management would be easy if projects always proceeded as they were originally intended, planned and mandated by the responsible parties. If that were the case, devoting a whole discipline to project management would probably be unnecessary. But complex and volatile business landscapes of a present day together with the overall rate of change that is being increasingly accelerated by advancements in technology mean that projects rarely go according to plan.

In reality, even the most detailed planning, diligent preparation and application of the most sophisticated risk management techniques cannot prevent

unwelcome surprises and there inevitably will be things that someone failed to include, chose not to consider, or as Browning and Ramasesh (2015) rightly note, «has [not] bothered to find out» (p. 53). Moreover, customer demands may change, business strategies may evolve, and competition may turn out to be more adept and deliver the result faster

Experienced project managers therefore know that the real trick of successful project execution lies in the ability to handle unforeseen challenges – in its essence, project management is change management, or, to put it more accurately, *information-driven change management*.

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**The real trick of successful project execution lies in the ability to handle unforeseen challenges — in its essence, project management is information-driven change management.**

When a sudden problem arises, it necessitates for all work processes to be altered in such a way as to maintain continuous progress toward the project goal. Staying on track despite the new circumstances requires high levels of flexibility and adaptability on the part of both project managers and team members. But if they can react to change appropriately, the new project requirements can be used to find solutions instead of being perceived as obstacles, which would further impede progress. It is true that many companies now recognize this correlation and strive to achieve greater operational and organizational agility.

The latter is deemed particularly valuable in turbulent

markets (Sull, 2009) and in fact organizations with higher agility tend to report more projects successfully meeting original goals and business intent (PMI, 2017a, p. 4). But at times, however, it can be extremely difficult to bring a project to success, and many notorious examples prove that ventures both large and small can fail alike.

The Elbphilharmonie concert hall in Hamburg, Germany may have at last proudly welcomed its enraptured audience after years of cost and schedule overruns, but it is hard to escape the idea that eventually it has come to be known to the public not only for its spectacular design but also an equally spectacular price tag

amounting to €789 million (Wainwright, 2016).

On the other end of the country, the construction saga of the Berlin Brandenburg International Airport is still ongoing at the time of writing. Having pushed the original €2.8 billion budget up to €7 billion due to uncountable engineering flaws and ensuing delays, it has finally led some to suggest that it is best to “tear it down and start over” (Rooks, 2018) and others to attempt putting the airport grounds to better use (Bahn, 2018).

The disastrous opening of Heathrow’s Terminal 5 in the UK is also a perfect embodiment of the consequences of failed management, planning, and testing (Corkindale, 2008), just as is the infamous launch of HealthCare.gov, an American online insurance marketplace website, that turned out to be utterly unprepared for the user demand and ended up suffering a very similar fate (Kelley, 2013).

These examples can be considered the extremes of project failure. Their outcomes may have been predetermined by high ambition, organizational challenge, and politics. But undoubtedly, they are also the result of the inability or unwillingness to pay attention, recognize, accept and adequately address the numerous warning signals, as well as the inability or unwillingness to adapt to change.

It probably does not come as a surprise that two of the four aforementioned cases involved the

development and implementation of software. Indeed, countless lesser-known dramas that nonetheless play out every day in companies all over the world, often posing a threat to their very existence, can also be attributed to various IT initiatives. In their study of 1,471 IT projects Flyvbjerg and Budzie (2011) have established that while on average IT projects incur cost overrun of 27%, one in six – alarmingly – face a cost overrun of 200% and a schedule overrun of nearly 70%. In what concerns large IT projects, on average, they end up going 45% over budget and 7% over time, all the while delivering 56% less value than expected (Bloch, Blumber & Laartz, 2012).

With findings such as these it is easy conclude that information technology industry is more susceptible to risk and failure, something Whitney and Daniels (2013) argue is due to the inherent complexity of IT projects. But while this may indeed be the root cause, there are many reasons that can set up a project to fail, and they often apply to projects of all types. In fact, only 3% of IT project failures are attributed to technological challenges, whereas 54% of projects run into trouble due to poor project management, with insufficient communication being identified as one of the key pitfalls (Gulla, 2012).

In the case of the Berlin Brandenburg Airport, significant scope changes, conflicting interests and the lack of expertise on the part of board members (Diekmann et al., 2013; Nieto-Rodriguez, 2017) have all contributed





**Regular status reporting which is first and foremost aligned with the information needs of those in charge and is deeply embedded in the company's culture is a significant element of any project organization.**

their part to this never-ending debacle, but so has the inadequate communication on the real status of the project. On the contrary, communicating frequently and effectively is recognized as being essential for agility and adaptability of projects (Browning & Ramasesh, 2015), and according to the Global PM Survey conducted by Pricewaterhouse Coopers (2012) among respondents from various industries, is associated with increased success in relation to quality, scope, and business benefits.

The past year has finally seen a rise in project success rates (PMI, 2017b), an improvement that is primarily associated with the adoption of proven project and program management practices. Maturing methodologies and approaches help organizations perform more efficiently, waste less money, and see more initiatives reach their original

goals and business intent on time and within budget. Likewise, formal methods and tools provide great assistance in supporting proper communication. Regular status reporting which is first and foremost aligned with the information needs of those in charge and is deeply embedded in the company's culture is a significant element of any project organization.

By serving as a bridge that connects various project participants and ensuring that the right information is transmitted and processed quickly, simply and effectively across levels, a properly functioning reporting system supports the two cornerstones of successful project management – communication and collaboration. The following chapters discuss how such a robust and stable reporting framework can be implemented to improve projects' chances for a favorable outcome.

# **STATUS REPORTING IN PROJECT-ORIENTED ORGANIZATIONS**

# Status Reporting in Project-Oriented Organizations

In their book on management reporting, Weber, Malz and Lührmann (2008) define reporting as a systematic, structured and timely provision to the various recipients of the necessary consistent information.

In what concerns project work, the primary purpose of reporting is to make the project life cycle and progress transparent and to provide insight into the current status of the project in relation to its overall health, scope, cost, schedule, and other attributes, together with any deviations from the original plan

Nowadays, an effective reporting is one that is capable of quickly mapping complex and rapidly changing requirements and ensures prompt and complete informing of the relevant parties about the project at any given time.

While this represents a considerable challenge, this is also often the only way that the management and other stakeholders can gain valuable information necessary

to develop an appropriate course of action.

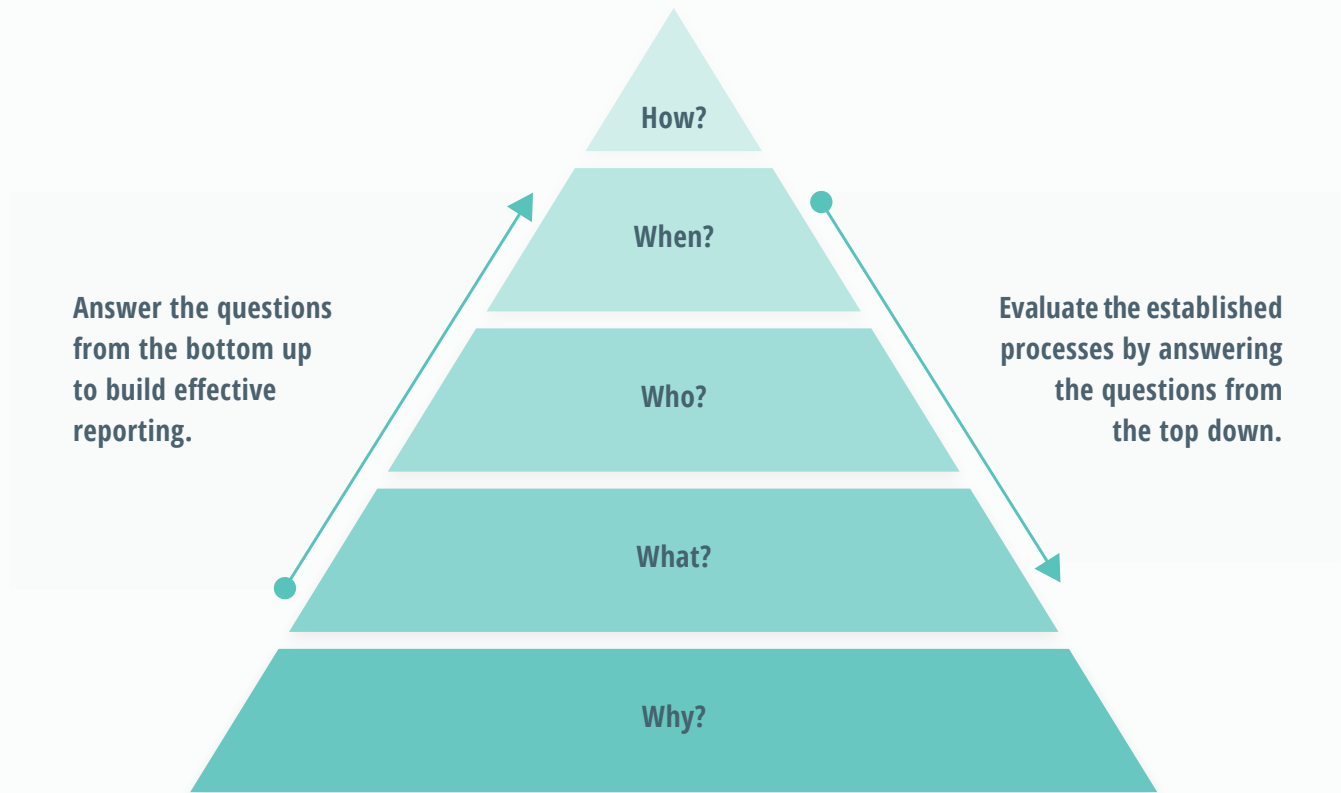
How specific goals of reporting are defined depends on the real-life conditions that a given company finds itself in and which inevitably affect the activities of all its business units. These goals are unique and must be closely tied with the company's overall business objective.

Yet besides being goal-oriented, it is equally important that reporting processes are also clear and pragmatic. In general, the more complex the organizational structures and projects become, the stricter and more extensive become the requirements for the scope and reliability of the provided information.

The design and implementation of reporting processes that can satisfy such demands become an intricate matter. The following sections are devoted to discussing in detail the aspects that need to be considered in this endeavor.



## Five Questions to Ask Before Setting Up Reporting



**Figure 1.** Five questions to ask about reporting.

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All individual processes within an organization stem from their respective task areas, which, in turn, must be the result of clearly defined goals. The same applies to reporting.

To ensure that each element of reporting contributes to project success, several key points must be first carefully addressed.

A multitude of leading questions can assist in this task, yet the most basic ones, namely the why, the what, the who, the when and the how, constitute the

absolute minimum that must guide the development of a reporting framework.

At first sight these questions may seem clear and straightforward, which in fact often results in them being neglected. But herein lies the problem: just because something appears simple does not necessarily mean it will also be easy.

And without due attention devoted to answering these questions, all attempts at establishing any kind of formal reporting may turn out to be futile.

# 1

Why report at all?

## Why?

The first question is by far the most important one. Serving as foundation for all subsequent questions and thus directly affecting structure, design, content and frequency of reports, it also helps to align everyone around the same goals. On the one hand, the answer to this question legitimizes the author's reporting responsibility as well as defines the possibilities and limits for his scope of action. On the other hand, it holds the other side of the reporting process – the recipient – accountable to act upon reports and to provide the required decisions in a timely manner. It is important that the purpose of the report is defined as clearly and as fully as possible, so that the reporter understands the meaning and value of the assigned task. An ambiguously defined purpose may result in the wrong type of information being collected, thereby making the report effectively useless, since its content would not answer the relevant questions.

# 2

What must  
be reported?

## What?

Project status reporting is all about information, i.e. information that is useful and helps meeting intended project – and business – goals. Addressing the content level of reports therefore entails identifying criteria that will determine what data is collected and then subsequently included in the reports, in other words – what is imperative for decision-making at the highest level and what can remain at the discretion of the project manager. Since content is inevitably linked with form, and the latter can often directly affect how well the report communicates what is necessary, the formal aspects, namely structure and design of the report, must also be thoroughly considered at this stage. Additional questions concerning the level of detail that a report must provide, the ways in which collected data can be converted into meaningful information as well as the associated levels of information density and depth can assist in answering this key question.

# 3

Who should  
be involved  
in reporting?

## Who?

Just as any other type of communication, the process of reporting naturally involves two parties – a sender and a receiver, or a reporter and a report recipient. Both of these sides must be clearly defined and their relationship formalized in order to ensure that everyone is aware of their exact responsibilities. In answering this question, it is particularly important to focus not so much on individual assignees or particular departments in which the report will be created but rather on identifying organizational units that, on the one hand, have unobstructed access to the necessary resources or are best suited to gather the decision-relevant information, and on the other, will be able to put it to work. However, merely designating these two parties is not enough, and instead, both functions must be closely coordinated to enable free and consistent interaction throughout the project execution.

## 4

When  
to report?

### When?

The timing of reporting depends entirely on when the necessary information would be most useful to the receiver and for the attainment of stated objectives. It is necessary that time frames for the collection and processing of data and reporting dates are determined in advance to avoid needless complications in the form late or incomplete submissions, to enable smooth routinized workflows, to convey clear expectations, and to facilitate comparability of data over time. All participants must be made aware of the reporting schedule so that they know their current tasks and are prepared for the upcoming steps. Typical examples of temporal landmarks are specific deadlines or fixed intervals in which a report must be finished and made available to the recipient.

## 5

How should  
the report  
be created?

### How?

Nowadays, various software solutions can support reporters by simplifying their data collection, sorting and transmission tasks. Yet compiling a substantial report from a multitude of sources that is able to cater to the recipient's expectations can still be excessively time-consuming, which is not in the least due to such mundane reasons as limited integration capabilities of various applications. It is therefore necessary to examine in detail the potential workflow of a report creation and not only establish the means and methods that are currently available to the people responsible for reporting but also to investigate in what way carrying out this duty could be made easier.

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**Just because something appears simple  
does not necessarily mean  
it will also be easy.**

It is crucial that ample time is set aside to coming up with meaningful answers; ideally, even before the first steps to set up the processes are taken. This will ensure that the workflow is not disrupted at a later stage when reporting has already begun and that those involved are not deprived of the certainty that they can at all times rely on a stable framework. At later stages, the same set of questions can be used to regularly review the established reporting framework in order to ensure that all processes, procedures and tools contribute to the overall purpose of reporting and its alignment with company's strategic objectives.

## Roles and Responsibilities

People are a crucial element in all aspects of project management, and one that often determines a project outcome. And thus, in addition to clearly outlining goals and objectives of project status reporting, sufficient attention needs to be paid to people directly involved in the process, their tasks, requirements, and expectations.

It is essential that roles, responsibilities and interactions between them are clearly defined, documented and conveyed to everyone concerned so as to facilitate productive cooperation and optimize the overall performance and efficiency.

Although reporting in itself involves only two parties, in large corporate structures as well as in companies that engage in multi-project management, where the processes of reporting become increasingly extensive and complex, some organizational bodies often come to assume a dual responsibility, that of the recipient of information and the information provider.

Taking into account that such intermediating bodies are becoming in the recent years a standard feature of organizational landscape with 85% of survey

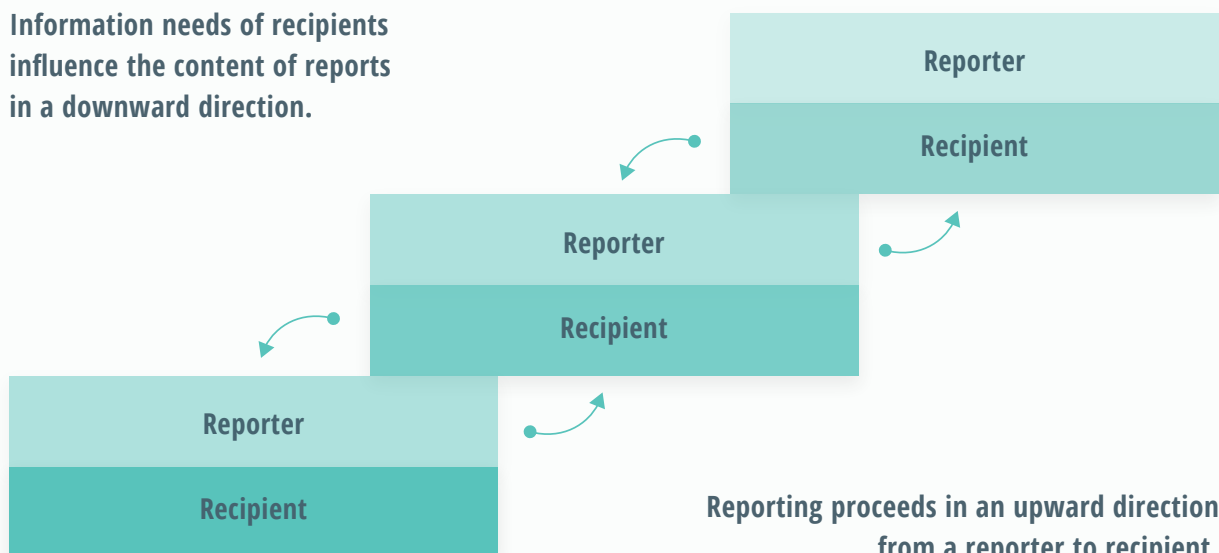
respondents reporting to have a PMO (PM Solutions, 2016), it is then worth identifying and addressing three groups of actors and their respective roles:

- **Senior Decision Makers**  
as report recipients
- **Reporting Function**  
as both report recipients and reporters
- **Information Providers**  
as reporters

To whom these roles are assigned as well as the number of people required to fulfil them varies depending on the size and organizational design of a company.

In the following, individual tasks, motivation, requirements, and significance of each role in relation to status reporting are discussed, beginning with the recipient as the entity whose needs and interests must be at the heart of the entire status reporting framework.

**Information needs of recipients influence the content of reports in a downward direction.**



**Figure 2.** A model of a reporter-recipient relationship.

## Senior decision makers

Recipients of reports usually belong to senior management and/or are members of a steering committee. Rarely having the opportunity to be involved in day-to-day project operations or stand-alone processes, they rely on status reports to provide them with valuable insights and to lay ground for appropriate measures in the realms of strategy and overall business goals.

To make informed decisions, recipients of reports must have complete understanding of the current progress and status as well as of any issues or events that might bear direct or indirect implications for their project portfolio.



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**Simply transmitting raw data is not enough — content without context is meaningless.**

To meet this requirement, an effective management reporting must therefore be one that exceeds mere replication of what was collected at the source. Simply transmitting raw data is not enough, essentially because content without context is meaningless. Instead, reports must be comprised of parsed data presented in the form of interpretable statements that can help recipients understand the background and serve as the basis for further action. This may involve pointing out specific project developments, providing comparison of planned and actual values, or making forecasts.

Keeping in mind that any person has a limited working memory capacity, it is worth reducing the report to three or four key points, thereby not only allowing it to be more focused on the most important aspects but also avoiding harmful information overload.

Although reports are mainly created to support status review meetings, it is good practice to share

them with participants in advance. This way people are given the opportunity to get acquainted with the latest project developments and can later spend the precious meeting time on the actual analysis of the received information, on identifying and addressing issues, and discussing the next steps.

Ideally, recipients should be able to acquire all the necessary intelligence without any additional involvement from the author of the status report – something that grows to be increasingly important, given the need for quick decision-making often outside of traditional office setting.

Considering all the intricacies of reporting along with its significance for the project outcome, it becomes clear that while high quality information provision is of particular interest to the management, it is also part of their responsibility to ensure that an organization has a well-functioning reporting framework that is effectively embedded in the company's work processes at all levels.

## Reporting function

Within project-oriented organizations the role of a body responsible for reporting processes can be assigned to project managers, heads of departments, the controlling department, or the project management office. The main task of the reporting function is to act as a liaison between those directly involved in the project development and senior management. In this regard, they are in charge of aggregating and processing, both conceptually and structurally, the data received from team members or project leads and providing the management with decision-relevant information.

As a governing entity, the reporting function is responsible for defining project management processes, standards and tools, as well as for their implementation and adoption by project team members. Reporting processes must be organized in

a way that ensures that all participants are familiar with the workflow, know their roles and responsibilities and are informed of specific timeframes and deadlines. It is necessary to create a joint awareness for the significance of data quality and consistency among all those involved to ensure better reporting discipline and proper adherence to established procedures.

Most effectively this goal is achieved if those who are responsible for reporting, be that project managers, middle management or members of the project management office, are in possession of social and emotional intelligence as well as leadership skills that can enable them to align the needs and working methods of their team with the requirements of report recipients in a way that enables effective information flows.

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### **The main task of the reporting function is to act as a liaison between those directly involved in the project development and senior management.**

An equally important part of the job is finding the best way of communicating the message so as to adequately fulfill the recipient's needs. In particular, this entails deciding on the format of reports and providing templates that are to support, above all, high quality and comparability of data.

But handling information appropriately is not an easy matter – because quantity does not equal quality. A report may contain volumes of information and still lack what is required. Or the information provided in the report may not be enough to fully reflect the current situation. Or when it is sufficient, it may still be difficult to convey the point accurately due to accompanying amounts of data.

Generally, these complexities can be avoided in several ways, each of which is useful on its own



but when applied simultaneously allow to benefit from their combined effects.

Firstly, information needs of the report recipients must be fully accounted for when setting up the reporting processes. Learning of these needs is possible through a thorough survey of senior decision makers on their requirements, preferences, expectations,

and the intended purpose of reports.

Secondly, the reporting function must reflect constantly on why particular pieces of data should be included or excluded from the report, whether the gathered data is still required or if it is no longer relevant at the moment of reporting.

It is apparent that those in charge of the reporting are endowed with great responsibility. Their choices about including or omitting certain information as well the way that it is contextualized and presented can and do inadvertently influence what the management understands and thinks about the projects. And so

lastly, to ensure that this role is fulfilled most effectively, it is helpful if it is treated as that of a business partner who is closely aligned with business operations and is therefore better able to assess potential applicability of specific information.

If both sides – the body responsible for reporting and the management – accept this and the former is kept in the loop with regards to not only individual project backgrounds but also company's strategic goals, it is possible to turn project status reporting into a powerful tool that systematically enables timely and accurate decision-making.

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**Without the acceptance of information providers, a reporting system will present little more than a formality and will eventually fail to deliver expected results.**

### Information providers

Various information providers, such as project leads or project team members, are an integral part of project status reporting, and without their active and conscientious participation the success of the undertaking is virtually impossible.

If the reports are to be useful to recipients, it is of utmost importance that information that is collected and subsequently made available to the body responsible for reporting is correct, complete and on time. But, unfortunately, this goal is not as easily attainable.

Individuals in charge of individual work packages or projects may perceive their obligation to report as micromanagement and be unwilling to perform the task with due diligence; they may feel overburdened with additional responsibilities; or they may try to avoid being the bearers of bad news and thus may add a positive spin to their reports, thereby rendering them potentially misleading.

Whatever the reason, without the acceptance of information providers, a reporting system will present little more than a formality and will eventually fail to deliver expected results.

Eliminating issues that can result in flawed or even false reporting is possible with a set of countermeasures. On the one hand, a routine reporting discipline that is characterized by the timely submission of reports can be achieved by the adoption of simplified and standardized reporting procedures as well as by providing clear guidelines on the form and content.

On the other hand, general resistance against the practices of information gathering and reporting can be overcome through clear communication of purposes and of benefits that information providers can themselves receive, either directly through the optimization of project management processes or by way of achieving company's business goals.



## Reporting Plan

Project-oriented organizations normally rely on a multitude of formal and informal ways to communicate a project status, each of which can equally serve the purpose, depending on the circumstances.

Formal reporting mainly involves preparation and distribution of scheduled status reports. Each such report is based on previously defined requirements, all of which naturally vary between different organizations, project cycles, or the distribution frequency. To achieve regular and consistent reporting and to avoid potential confusion about who needs what and when, this set of requirements must be fully documented and shared with everyone involved in the process of reporting.

A particularly useful tool for recording and further communicating these standards is a reporting plan.

A reporting plan can take form of a simple table, such as **Table 1**, in which all aspects related to the format and contents along with any additional information pertaining to the author and recipient of report, and the frequency or specific dates of reporting are outlined.

A neat tabular format is well-suited to provide the reader with a quick overview of key requirements, is flexible enough for implementation of changes to allow for preliminary planning, and can be made easily accessible for reference to all interested parties.

Reporting plan acts as an agreement on specific deliverables between all actors that partake in the reporting and is a first step to more streamlined processes and targeted communication.

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**Reporting plan is the first step  
towards more streamlined processes  
and targeted communication.**

## Project Status Reporting Plan

	Task Status Report	Progress Report	Project Budget Report	Portfolio Status Report
Reporter	Task Responsible	Project Manager	Project Lead	PMO
Recipient	Project Manager	PMO	Sponsor	Managing Board
Purpose	Report on project's progress and next steps.	Report to help PMO identify priorities and decide on resource allocation.	Report on project's progress with focus on financial performance.	Report on progress in relation to strategic objectives.
Essential Content	Task status % complete Activities completed Activities planned Issues	Project summary Overall project status % complete Activities planned Resource work load Trends Actions needed	Overall project status Activities completed Actual cost vs planned cost Project risk evaluation Actions needed	Overall portfolio status Actual cost vs planned cost for top 10 projects Top 5 risks and issues Dependencies Actions needed
Frequency	Weekly; Upon request	Biweekly	Every Tuesday (before 14:00)	Monthly; Upon request
Format	Excel template	Excel template	One Pager	Presentation

**Table 1.** Typical structure of a status reporting plan with sample content.

A crucial part of any reporting plan is the cycle of reporting. At the most basic level, the timing of reporting depends on when the information would be able to have the best effect, while frequency is largely related to the importance of a particular project to the organization or the report recipient. Hence, the reporting cycle can take many forms.

Scheduled reporting can occur at fixed intervals, e.g. weekly, biweekly, or monthly, or it can be built along project milestones. Serving as temporal landmarks on the way to a project's completion, milestones denote the beginning or the end of a project phase, key events, or the dates for submissions of project deliverables. Upon achieving such a milestone, a status report is normally created for a PMO or other controlling entity who then verifies if certain services have been provided on time, which interim results have been achieved and which tasks are still open, and approves a project's progression to the next phase if all the requirements have been fulfilled.

Reports can also be created on demand to answer a specific business question or in response to a sudden change in some of project's attributes. Ad hoc reports as these are invaluable in today's fast-paced and rapidly

changing business environment where insights must be delivered practically in real time to allow for smart business decisions that can help getting ahead of competition.

Despite this, however, it is important not to fall prey to constant ad hoc reporting. Reporting at fixed intervals not only allows project team members, project leads and management to monitor project health at a regular basis but also helps establishing routine communication within the organization. And with gradual implementation of routine communication about the status of the project, everyone involved can "devote more time and resources to economize performance and other measures for project success" (Müller, 353).

A deliberate plan that considers all the elements of reporting and outlines the precise requirements can greatly assist in finding a balance between a set of standard and ad hoc reports, and therefore helps finding the right level of agility necessary to quickly adjust to new circumstances and respond to current market challenges while maintaining organizational stability.



## Project Status Reporting Maturity Model



Project is a complex system, and its outcome largely depends on how all the elements of this system work together. Well-implemented reporting processes have all the potential to become one of the most important pillars of any project organization, significantly increasing the probability of project success.

Several aspects characterize effective reporting:

- **Timeliness** Information is only valuable when it is timely. Reporting must be organized in a way that enables punctuality and supports prompt information gathering to meet urgent requests.
- **Reliability** The information contained in reports must be true, accurate and correct to allow for informed decision-making.
- **Completeness** Every occasion of reporting must ensure that required information is provided in full and no relevant pieces are missing
- **Consistency** Information must be presented in a coherent form and manner. Consistency in data structure makes analysis and comparability possible and allows to identify anomalies quickly.
- **Continuity** The cycle of reporting must not break and should adhere to the predetermined schedule even at times of crises to maintain data integrity.

These attributes are useful as benchmarks in assessing the quality of reporting in an organization and provide the opportunity to codify what might be regarded as best practice. Processes that can be easily described in these terms deserve to be qualified as having achieved the highest levels of maturity.

The term “maturity” relates to the degree of formality of processes and implies a step-by-step evolution out of the early stages of implementation characterized by ad hoc practices and into more structured, formally defined and continuously optimizing ones. The concept of maturity models stems from the field of quality management and has since been most widely applied to software development processes. Following in the footsteps of the famous Capability Maturity Model (Paulk, Curtis, Chrissis, & Weber, 1993), designed to provide a conceptual structure for the management and development of software products, the proposed project status reporting maturity model depicted in **Table 2** similarly consists of five levels allocated against what can be deemed the four cornerstone elements, or dimensions, of reporting – purpose, people, process, and tools.

In an ever-changing competitive environment where external factors increasingly demand efficiency and effectiveness in every sphere of business, continuous enhancement and optimization of processes becomes a necessity. Despite this, very few realize that the same applies to project status reporting. The proposed maturity model serves to help recognize the present situation and identify a baseline for future improvements.

The various levels of maturity outlined in this model should be regarded as quality goals, and the characteristics for each of these successive stages are meant to assist in conducting a current state assessment and selecting measures necessary to attain the next maturity level.

As is evident, sustainable improvement of processes to a large extent depends on the level of standardization and operational efficiency. Therefore, the higher maturity levels, namely managed and optimizing, are most effectively achieved when project status reporting in all its aspects is supported by a comprehensive software-based solution, designed specifically for the purpose.

	Level 1 Initial	Level 2 Repeatable	Level 3 Defined	Level 4 Managed	Level 5 Optimizing
Description	Sporadic project status reporting, with data being collected, analyzed and reported exclusively on demand.	The most basic level of formal project status reporting with only key project metrics being regularly tracked and reported.	Formally established project status reporting based on developed standards and repeatable processes.	Efficient and effective formal project status reporting that provides full support to decision makers at all levels.	Fully formalized project status reporting characterized by continuous process audit and improvement.
Purpose	The overall purpose of reporting is not defined. A separate objective is determined each time.	The purpose of reporting is outlined, but most occasions of reporting fail to reach the goals effectively.	The purpose of reporting is defined. Clear reporting requirements are set and documented in a reporting plan.	The purpose of reporting is fully articulated and aligned with organization's strategic plan. Clear reporting requirements are defined and complied with.	The purpose of reporting is continually reviewed and optimized to better support company's current strategic objectives.

**Table 2.** Project status reporting maturity model.

	Level 1 Initial	Level 2 Repeatable	Level 3 Defined	Level 4 Managed	Level 5 Optimizing
People	People at all levels lack common understanding of reporting and associated benefits. Organizational and management support is lacking.	People at all levels have a limited understanding of the full potential of status reporting. Although the need for a systematic approach to status reporting is recognized, little organizational support is provided.	Reporting roles are identified, their responsibilities are delineated. People are informed about and follow established standards and adhere to the predetermined reporting cycle. Senior management approves the development and use of standards.	Senior management expresses explicit support for project status reporting. Information providers are aware of the value of project status reporting and do not perceive it as a hindrance.	Senior management recognizes the benefits of quality status reporting and is devoted to supporting continuous improvement. Information providers are prepared to give feedback and are willing to contribute their knowledge and experience.
Processes	The processes are characterized as ad hoc, reactive and generally unrepeatable. No documented framework exists, no plan is in place.	Some project status reporting processes are established, but standardization across projects or departments is lacking. A small amount of proven practice allows some reporting occasions to repeat earlier successes in similar situations.	Project status reporting workflow and standards are documented and communicated to everyone concerned. Most reporting occasions follow these standards and fulfil the information needs of report recipients.	Project status reporting is fully integrated into project management across organization and follows an established workflow without delays and interruptions. Compliance with the standards is constantly monitored to ensure high quality of reporting.	Additional processes are in place to improve project status reporting: formal analysis of existing methodology is conducted, lessons learned are gathered and implemented, report recipients are regularly questioned on their information needs, feedback from information providers is sought, recorded and used.
Tools	Data collection and processing are supported by manual effort.	Sporadic use of methods and tools, with manual processes prevailing considerably.	A multitude of disparate tools support various stages of reporting. Key processes are automated, others require manual effort.	A set of seamlessly integrated tools or a comprehensive reporting system supports various stages of reporting and allows to connect and unify data from diverse sources. The amount of manual effort is reduced to a minimum.	The set of tools or a reporting system is regularly reviewed and renewed for further process optimization and usability enhancement.

Table 2 (continued). Project status reporting maturity model.

# Conclusion

Inherently bound by a range of constraints, project management has never been an easy matter. But managing projects in the increasingly fast-paced and rapidly evolving environment is a whole new type of a challenge. No matter the industry, constant change, uncertainty, and instability are the reality.

Nonetheless, a multitude of methodologies and approaches, assuming they are competently implemented, can help companies have more initiatives reach their original goals and business intent on time and within budget despite the new conditions. In fact, as recent data suggests, with more organizations now willing to adopt these methodologies and approaches, project success rates are gradually rising.

Formal project status reporting as one of such methods is particularly useful in overcoming what is often recognized to be among the biggest barriers to project success – poor communication. Nowadays, when insights must be delivered essentially in real time, effective communication is key. Without important information reaching relevant people when it is needed, project risks grow and chances for a favorable outcome diminish significantly.

In contrast, communicating frequently, openly and truthfully about the actual status of a project in relation to its overall health, scope, cost, schedule and any other attributes helps to detect deviations from the original plan early and effectively presents the opportunity to get a derailed project back on track.

As the project portfolio expands and as the projects themselves become more complex, the need for effective reporting processes becomes ever more evident. Often, regular, reliable and readily available project status updates turn into a prerequisite for high-quality, pertinent business decisions. But very rarely can one reap rewards from something without having to invest in it first. Similarly, project status reporting is more likely to be beneficial if the design and implementation of a reporting framework are approached meticulously and systematically

This white paper sought to assist in this task by laying out the methodological groundwork for building effective status reporting. By starting with identifying general goals and specific objectives of reporting, then further addressing interests, needs and pains of both reporters and report recipients, developing a deliberate plan, and finally adopting the mindset and techniques for perpetual enhancement and optimization it is possible to establish status reporting as a timely, reliable, complete, consistent, and continuous process that can support informed decision-making at the highest level.

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## ABOUT RADAR

RADAR is a project tracking and status reporting solution that provides complete visibility into company's project portfolio and a one touch access to a detailed project overview. RADAR streamlines reporting processes, fosters collaboration, saves administrative effort, and ultimately allows for informed decision-making at all levels.

## ABOUT GET IT

GET Information Technology is an international management consulting and software engineering company. GET IT supplies clients across industries with solutions designed to support project, resource and portfolio management, post-merger integration programs, operational efficiency and cost reduction initiatives, as well as the implementation of major engineering projects.

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