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Project Status

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A project status process is one of the greatest opportunities to establish a positive, disciplined project management culture. The status monitoring process yields benefits beyond delivering projects successfully organization-wide. Without the integrity that results from a "project status awareness culture," success exists only in pockets of the organization that have excellent project managers.

As a consultant who has used many project management maturity models to assess the "innards" of many companies, large and small, renowned and unknown, I can attest that an organization's method of monitoring project status is a key indicator of that organization's project management quality.

Some organizations view project status as a necessary evil, just to satisfy incessant requests from management. Proactive leaders, however, use project status as a critical process that adds value to project management and facilitates communication to senior management, project partners and customers.

Project status monitoring should be viewed as a process at the core of discipline and integrity throughout the entire project management organization. Let's examine some best practices for project status.

Project Status Best Practices

Five characteristics of effective project management are common to most evaluation techniques.

1. Consistency –The status process should be basically the same for large and small projects, and consistent with their measures of success
2. Escalation – The status process provides a mechanism for escalation of key issues.
3. Simple – One page with the ability to drill down for details when necessary
4. Public – Status is available to all (as appropriate) in order to communicate issues, risks and corrective action measures
5. Inclusive – All projects are required to provide status on a consistent set of metrics

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Ten Obstacles to Effective Project Status

1. Management is always changing how status should be reported or requesting "special" reports and/or briefings that are outside of the normal, accepted standards and processes.
2. Status reviews are not held on a regular, consistent basis – same time, same place, same leadership.
3. Inconsistent status reporting to management from project to project, causing difficulty in interpreting status.
4. Leaders are too busy to review or accept status.
5. Status is reported at the detail level instead of summary.
6. Project managers are too busy working the project and fighting fires to monitor status.
7. Projects are not structured or organized for status metrics to be easily available.
8. Not educating the stakeholders and achieving "buy in" at the start of the project on how status will be monitored.
9. Over-reliance on status metrics by management, without a "feel" for what is actually taking place in the project.
10. Wasting too much time on the status of stable projects and not spending enough time on projects that are at risk.

Some companies have project failures because the leadership is made aware of a troublesome project too late to resolve the issue or to improve the situation without dire consequences. Such problems can be identified early as part of the project status process.

The Role of the Leader During Project Status Meetings

The leader's attitudes and behavior set the tone for all stakeholders in the project status process.

1. Take the status process seriously. The project managers and the project teams reflect the leader's respect of the process. Taking the status process meetings seriously means adhering rigorously to the meetings' scheduled date and time, and following a published agenda.
2. Focus on progress. Some organizations go so far as to call status meetings "progress meetings". The focus should be on the identification and resolution of challenges so progress can proceed at the scheduled pace. Status meetings must be "forward looking" and not allowed to degenerate into "finger pointing" or "blaming" sessions.

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3. Ferret out key issues. The leader must learn to ask effective questions. There is power in the public questioning of project managers and teams because the questions that are raised publicly, in front of all of the project managers, eventually become the questions they raise internally before the leader asks those questions again.
4. Establish a positive culture. Provide praise and opportunity where appropriate. Allow lower level personnel to present within their area of responsibility for their professional development and the development of future leaders.
5. Making timely decisions. Issues requiring a decision should get a decision at the project status meeting or a commitment to escalate the issue to the proper level for quick resolution. Actions and issues should be formally tracked to ensure timely decision-making and thorough follow-up. If decisions are delayed or avoided at the project status meeting, the wrong level of leadership is conducting the meeting or the wrong leader is conducting the meeting.

Project Status Meeting Frequency

The frequency of project status meetings can be weekly, bi-weekly or monthly, depending on the project's duration and risk level. Daily status meetings may be held by the project manager for critical and/or troubled projects. A typical project status meeting agenda for a program or organizational unit is shown below.

Agenda Item	Average Time
Meeting overview, attendance, validation of agenda items, special program/organizational announcements as required.	brief
Overall Project Status	
Project 1 status	≤ 3 minutes
Project 2 status	≤ 3 minutes
Project 3 status	≤ 3 minutes
▪	≤ 3 minutes
▪	≤ 3 minutes
▪	≤ 3 minutes
Project n status	≤ 3 minutes
Detailed Project Reviews	
Project Alpha	20 to 60 minutes
Project Gamma	20 to 60 minutes

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The presentation charts for overall project status should exactly represent the detailed status sheet. Back-up charts can be used as required. This not only avoids duplication of effort, but also emphasizes the importance of keeping information current and accurate. Projects in good standing, with all aspects of the triple constraints in control, can be reviewed rapidly (typically less than 1 minute). When the project status process is mature, the project is healthy, and the leader is familiar with the project, the status summary report allows the leader to eyeball the chart in under one minute and say "next project please."

A good project status meeting is really an "exception focused activity" with discussion on what is off plan or off process. Therefore, if a project is in good standing and has no issues, a discussion is not warranted. These are the project status reviews that take less than a minute. The goal is to establish a project status culture where leadership is not talking about what they could and should read for themselves, but addressing issues that require decisions, dissemination or escalation.

Every project manager should be ready for a detailed project presentation with a few days notice or less. Projects should rotate through detailed presentations at the regularly scheduled project status meeting, at the discretion of the program manager or organizational leader. It is important to have detailed project presentations from projects that are in good standing, in addition to the projects that have challenges. A project in good standing may be reviewed in detail at quarterly meetings specifically for detailed reviews or at designated general status meetings.

Why perform detailed reviews of healthy projects? For one thing, it is risky for the program manager or organizational leader to assume that projects with good current status don't have hidden issues. Risk assessment should be an ongoing process. On the upside, detailed reviews of good projects provide opportunities for praise and demonstrate the characteristics of a project in good standing. This positive model counterbalances the usual focus on the negative.

The status meetings serve as the forum for critical decisions with regard to troubled projects. Sometimes decisions have to be escalated outside of this forum, but the general rule should be that decisions are made at the meeting. It is important to establish a culture that doesn't allow issues requiring decisions to persist without resolution, and a culture where project managers know when and where to go for decisions beyond their control. Unfortunately, a number of organizations suffer because decisions are either not made, or are made in haphazard circumstances that are not migrated through the entire organization. The project status meeting is a decision tool and a communication tool that prevents those problems.

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The Project Status Sheet

Figure 1 shows a typical project status sheet. The author has observed dozens of derivatives of this format, proving that it can be tailored to the needs of the organization. Follow these ground rules for an effective project status sheet:

1. The project status sheet should be on one page. As with a resume or an e-mail, people rarely turn the page or scroll down to read lots of text. More importantly, it allows the readers to focus on what is important to them. A lot of information can be packed on one page. Examine a Value Line investment survey for your company or a company that supports your organization. You can read that one page for an hour. Busy executives and leaders don't have the time and are typically not inclined to wade through multi-page status reports. Print the sheet using a small font to fit everything on a single page.
2. New information or information that is less than one month old should be typed in bold font to allow quick identification of what has changed since the previous reporting period. This saves significant time for the reader who knows the project.
3. The report is stand-alone and should provide a complete story without someone having to explain it. A good project status report provides a summary (including purpose) of the project, current status, upcoming milestones, and issues. These four quadrants of the status report represent the old axiom, "Where we've been, where we are, where we are going, and what are our challenges."
4. Use symbols (like the stoplight symbol) to indicate overall status.
5. It should clearly identify who is accountable (the preparer), the date it was put together and the preparer's telephone and e-mail address.

Quadrant 1 – Project Summary

The Project Summary quadrant states the overall purpose of the project and clearly relates it to the organization and/or company goals. This section answers all the "who, what, when, where, why and how" questions. It also provides a reference or link to more information about the project, such as a project charter or project repository. Once this quadrant is complete, it rarely changes unless the business needs driving the project change, usually causing a re-baseline of the project which should also be documented here. Even though this quadrant remains mostly static, it is important to include it because the organization and project team members are often not static, and this quadrant tells the new reader at a glance what the project is about.

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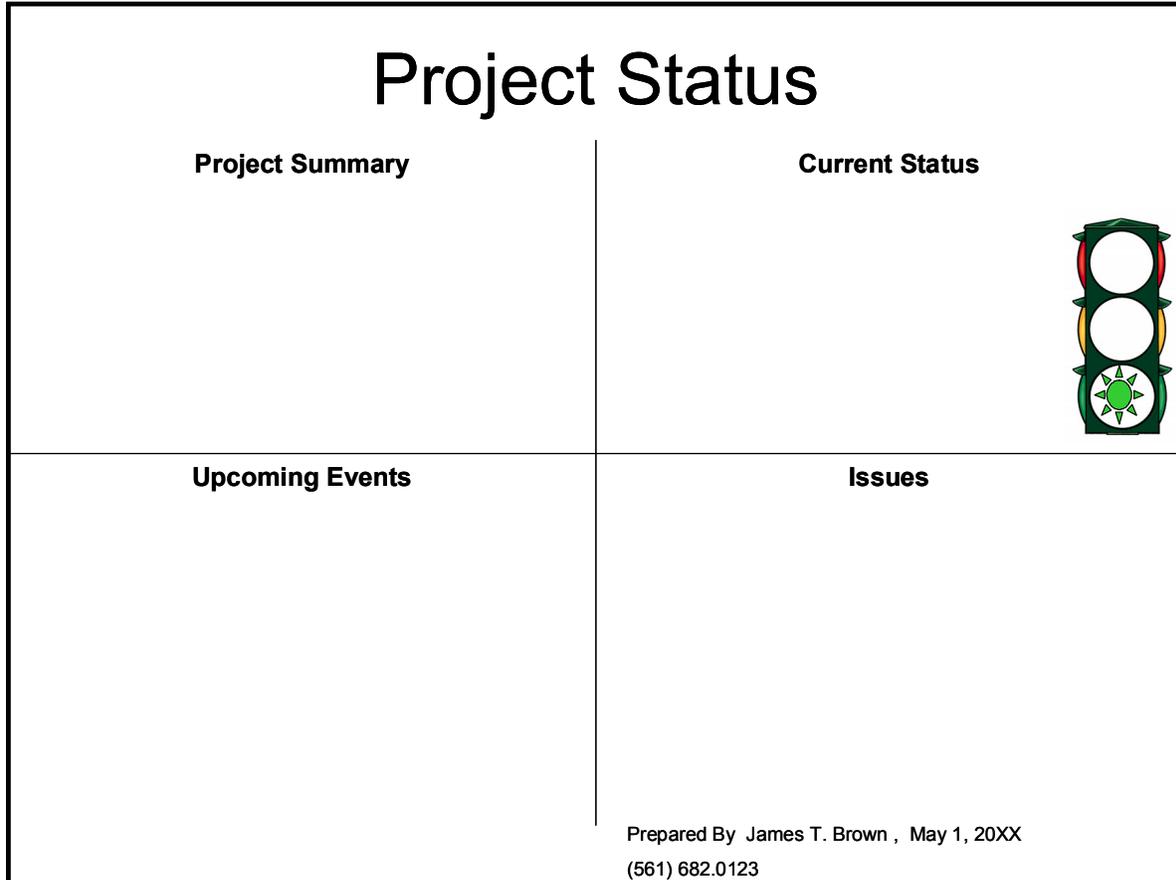


Figure 1

Quadrant 2 – Current Status

The Current Status quadrant clearly communicates the standing of the project. The cost baseline showing plan versus actual costs can use graphic or tabular format. The organization’s valid (accurate and timely) earned value measures can appear here. Some organizations will even show a metric indicating the customer’s “perception” of the project thus far because this may not always be consistent with the project manager’s perspective. The most important item in this quadrant is the symbol for the status of the project (usually a green, yellow or red indicator). Clear criteria must be established for what makes a project

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green, yellow or red. In addition to the overall project status indicator, some organizations show separate status indicators for the triple constraint – cost, schedule and scope.

Quadrant 3 – Upcoming Events

The Upcoming Events quadrant shows the planned activities and events for the short term (usually one to three months) and the major milestones beyond the short-term planning horizon. This quadrant provides a snapshot preview of what is on the plate of the project team over the near term.

Quadrant 4 – Challenges and Issues

The Challenges and Issues quadrant provides a mechanism for the project manager and project team to notify management of challenges and issues – and more importantly to identify their approach for overcoming these challenges and resolving these issues. It also provides the opportunity to highlight where decisions or “higher level influence” are necessary. Unfortunately, many projects produce less than desirable results because management does not provide critical decisions to project managers in a timely manner. Management should be keenly aware of the necessary decisions and should be held accountable for making hard decisions as required. This quadrant serves as a basis to drive accountability to both the project manager and his or her leadership.

Summary

Project status is a process that can instill discipline and integrity throughout an organization and ensure project success. It serves as a communications tool and facilitates the propagation of lessons-learned among participants. When project status monitoring permeates the culture, it saves the organization time by driving accountability and minimizing bureaucracy for quick, effective issue resolution.

Bio for James T. Brown

Dr. James T. Brown PMP, president of SEBA® Solutions Inc., a Registered Education Provider for the Project Management Institute, has provided project management training and consulting services for dozens of companies nationally and internationally. A recognized authority in project management, he is a frequently invited speaker on project management areas of interest. Dr. Brown may be contacted at 321.269.1222 or jtbrown@sebasolutions.com.

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