

## The 5 keys to a successful project reporting

Every manager has to report activities and indicators to its management. What is true in general for managers is true also for project managers. The reporting, part of the governance of the project, is key to its success, so it should be considered of high priority. Here are the five keys to a successful project reporting.

---

### Get decisions from your management

The first key to a successful and useful reporting is to present your management with questions and decisions they have to make. A good reporting does not focus on small issues and problems solved or open, but on points on which the project manager cannot decide alone and **needs a decision from the management**.

Such subjects include for instance:

- Prioritization of several projects;
- Allocation of a critical resource to one or another project;
- Hiring of people in the organization;
- Re-orientation of the project;
- ...

The project manager will then explain the points to the management, with potential decisions (along with pros and cons).

It is not rare that the management suggests another way to answer to the point, which is even better.

### Reassure your management

The management of a company asks for reporting because projects are key to the company, and they must not fail. Then, the question for the management is to know whether the project manager is the right person or not.

The reporting should reflect this, and “tell” the management that, even when the project is undergoing major issues and difficulties – like an explosion, or major injuries – **there is no better project manager to handle the situation**. If the management is not reassured, they will start micro-managing the project which will lead to delays in decision making and lack of helicopter view.

*Don't worry, I am the right person for this project*

The project manager would then feel dispossessed from his project and would give less implications.

### Step back for a helicopter view

The life of a project is, by definition, full of uncertainty and therefore surprises. Those “surprises” will affect the project and the project manager as well as the team must be, day after day, in the middle of the action.

However, the project manager must be able to step back and take a helicopter view on his project, to “take the pulse” and know the status of the project. It is usually difficult to take time from daily business to step back and analyze the project. Reporting obligation is there to oblige the project manager to do this exercise.

Project managers should take the reporting preparation as an opportunity to gain better knowledge on the project (on a broad basis), to be able to **anticipate in the near and far futures**, and therefore “lead” the project rather than undergo it.

### Communicate with the key stakeholders

The reporting must be seen as a very good opportunity to communicate on the project to the key stakeholders, so that they all have the same level of information on the project.

In this respect, the reporting should focus on the indicators of interest for the stakeholders, especially the sponsor / customer / management (depending on the entity you are sending the reporting to).

To build the reporting format, the project manager must identify the **indicators of importance to the stakeholders**, not to the project. The reporting is not the dashboard of

the project manager, rather the dashboard of the management.

### **Make a visual reporting**

The reporting should be visual, with drawings, pictures, bar charts,...

Some explanations must be present as well, but the key indicators should be presented visually and with simplicity. A basic rule is: **if a legend is needed, then the visual presentation is not correct.**

### **Key Factors for a successful reporting :**

1. Get decisions from your management
2. Reassure your management
3. Step back for a helicopter view
4. Communicate with the key stakeholders
5. Make a visual reporting