

How to create status  
reports that stakeholders want  
to read  
*and how to build them with  
Microsoft 365*



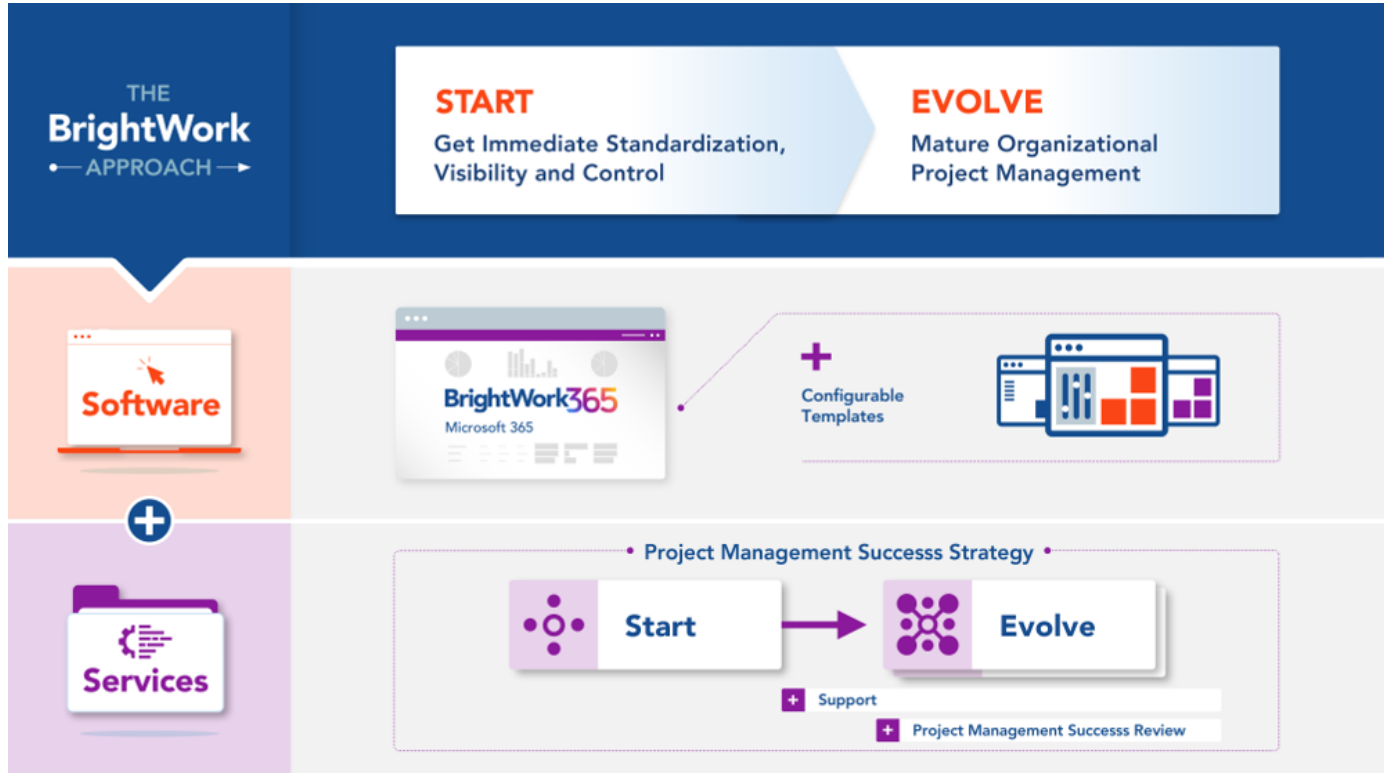
with

Elizabeth Harrin  
&  
Éamonn McGuinness



Project manager, author of *Managing Multiple Projects*, mentor, trainer, APM Fellow, juggler of work and life.





**It is a core element in our:**

- Software - with Configurable Templates
- Deployment Process
- Personalized Services

# Today we'll cover

1

## **The point of reporting**

4 reasons why you can't skip reporting

2

## **Stakeholder expectations**

What they need and how to give it to them

3

## **Demo**

How you can leverage Microsoft 365 for Status reporting

4

## **5 essentials**

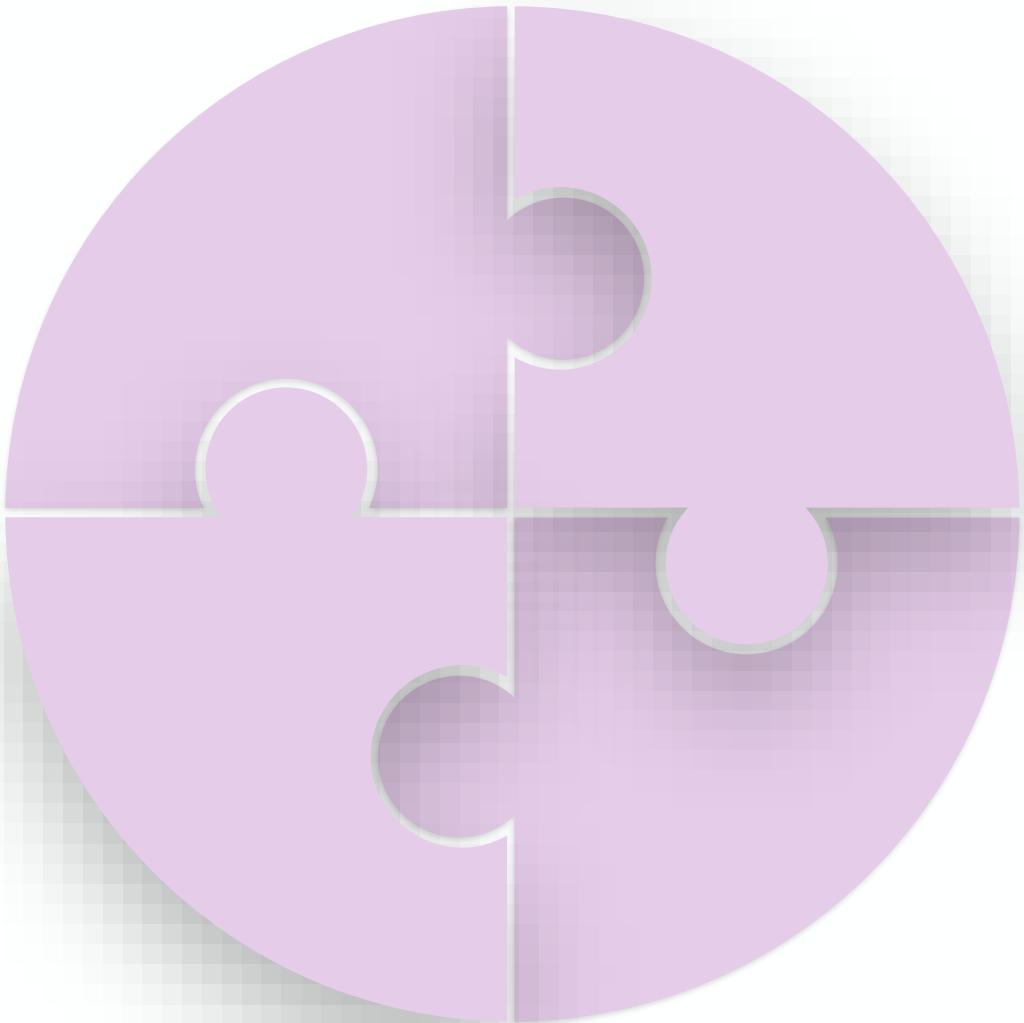
The basics that must be right so stakeholders pay attention

How do you feel about  
**project status reporting?**



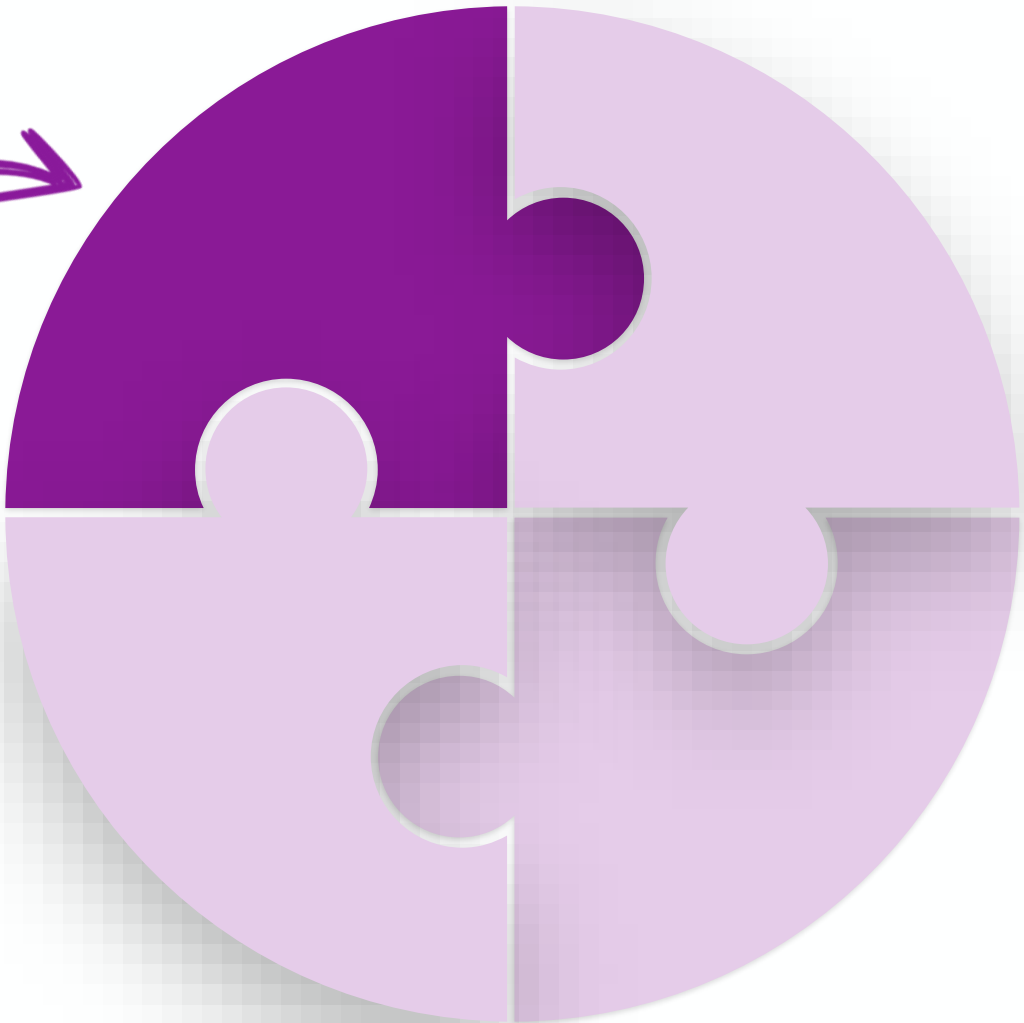
4 Reasons to report

# Why we report



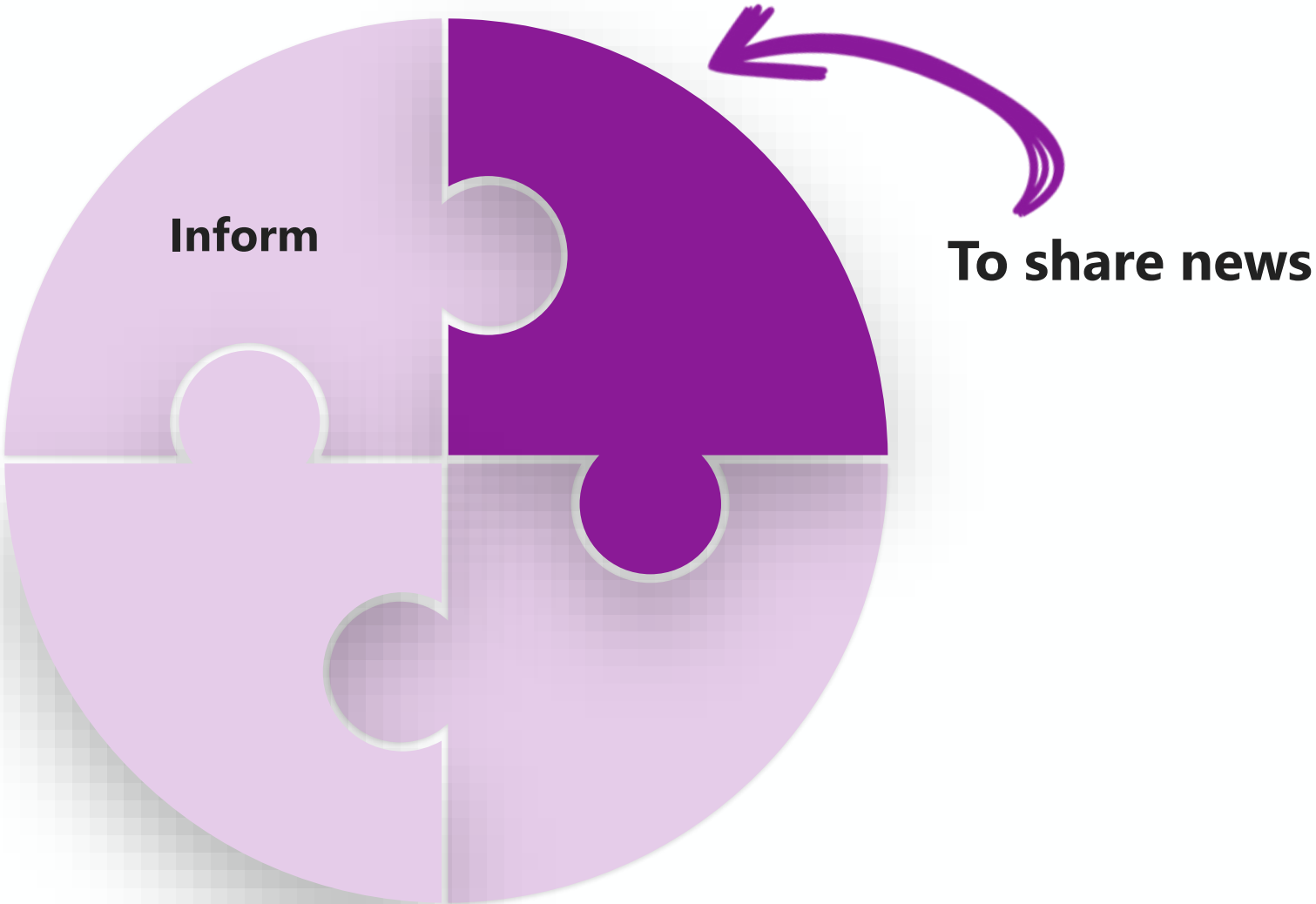
# Why we report

To inform

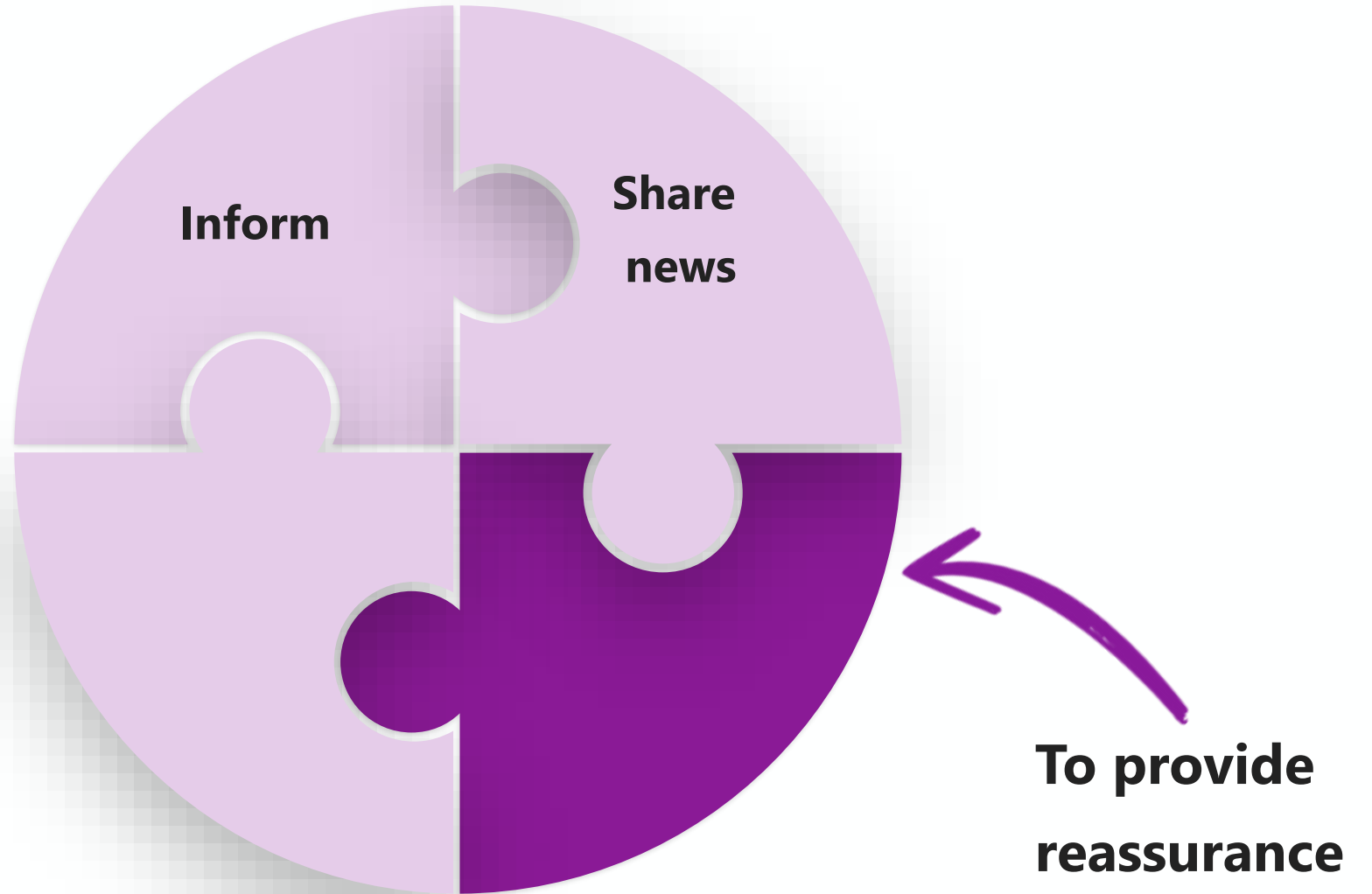




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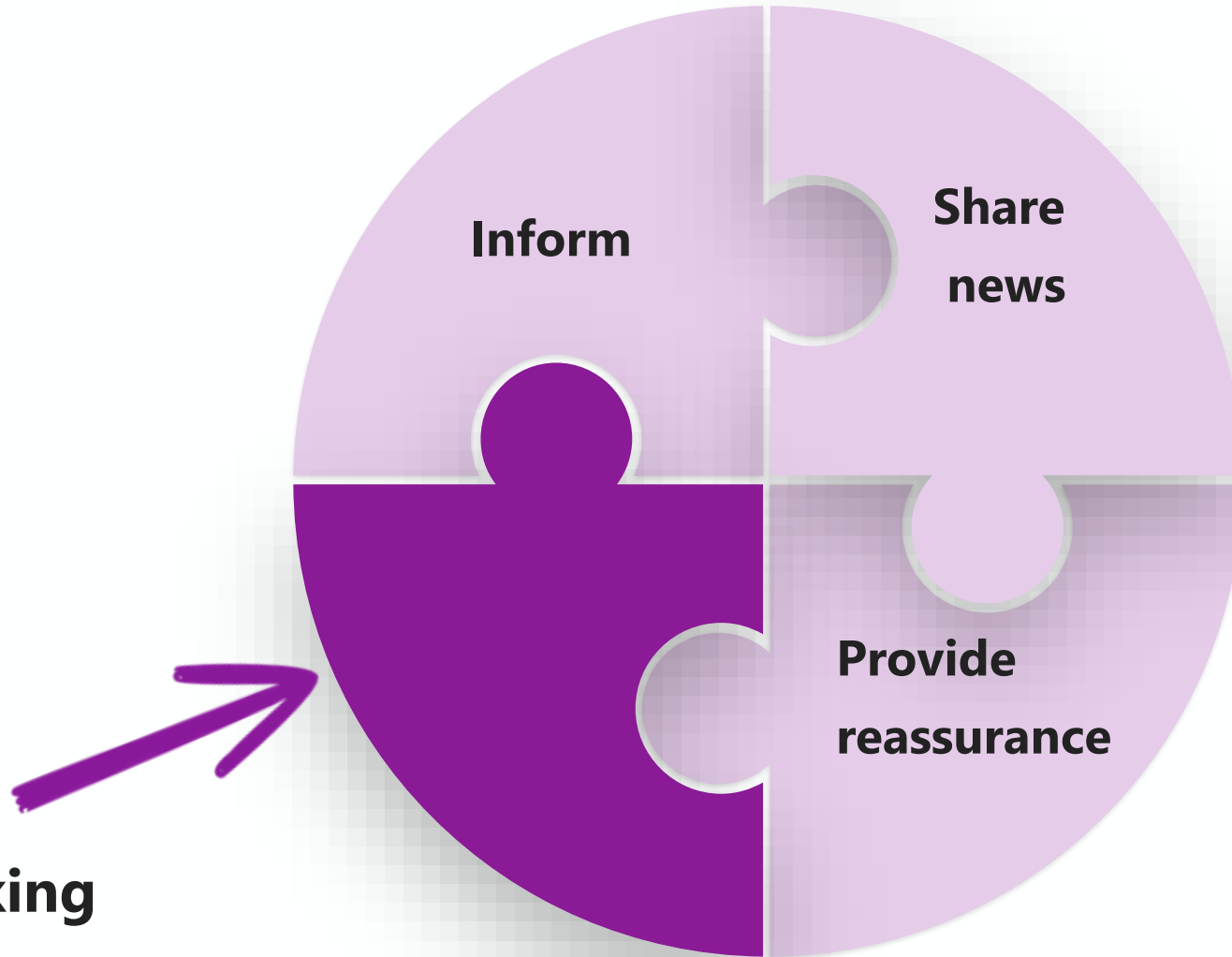


# Why we report



# Why we report

**To support  
decision-making**



# Why we report



Reporting has to balance  
what the audience wants to hear  
and what we need to tell them

2

Stakeholder expectations

Ask the right  
questions  
to get the right  
data

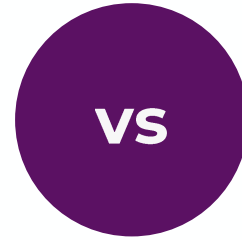
# Ask stakeholders what they want



- **What do you most want to hear about relating to this project?**
- **How often do you want to receive a formal status report?**
- **How often do you want informal reports?  
In what format?**
- **What are you most concerned about on this project?**



# Project management success



# Project deliverable success

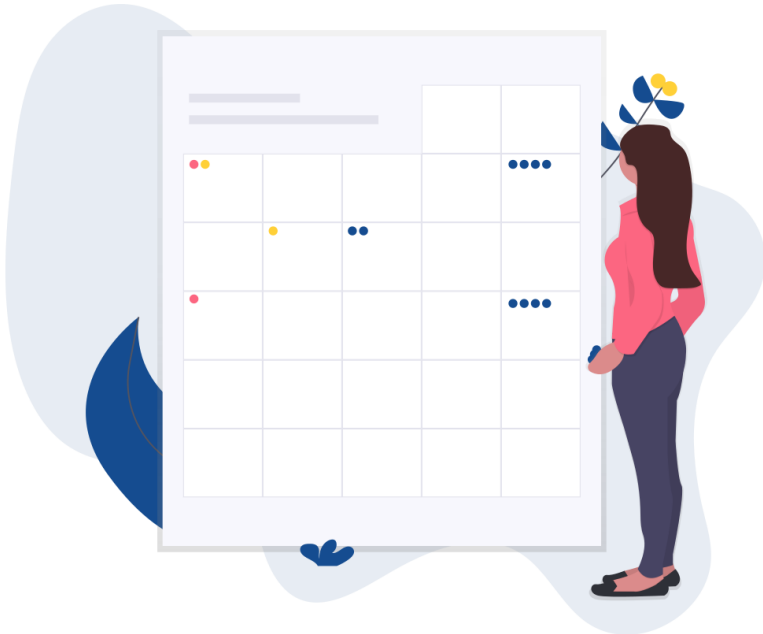
- **Did we do the project well?**
- **Did we follow processes?**
- **Was the delivery smooth?**

- **Did we get the expected business results?**
- **Did we deliver the right thing?**



# Decide what to track

- **RAG status**
- **Delivery dates/milestones**
- **Budget**
- **Resourcing**
- **Variances against forecast**
- **Narrative description of progress**
- **Most significant issues**
- **Most significant risks**
- **Decisions required**

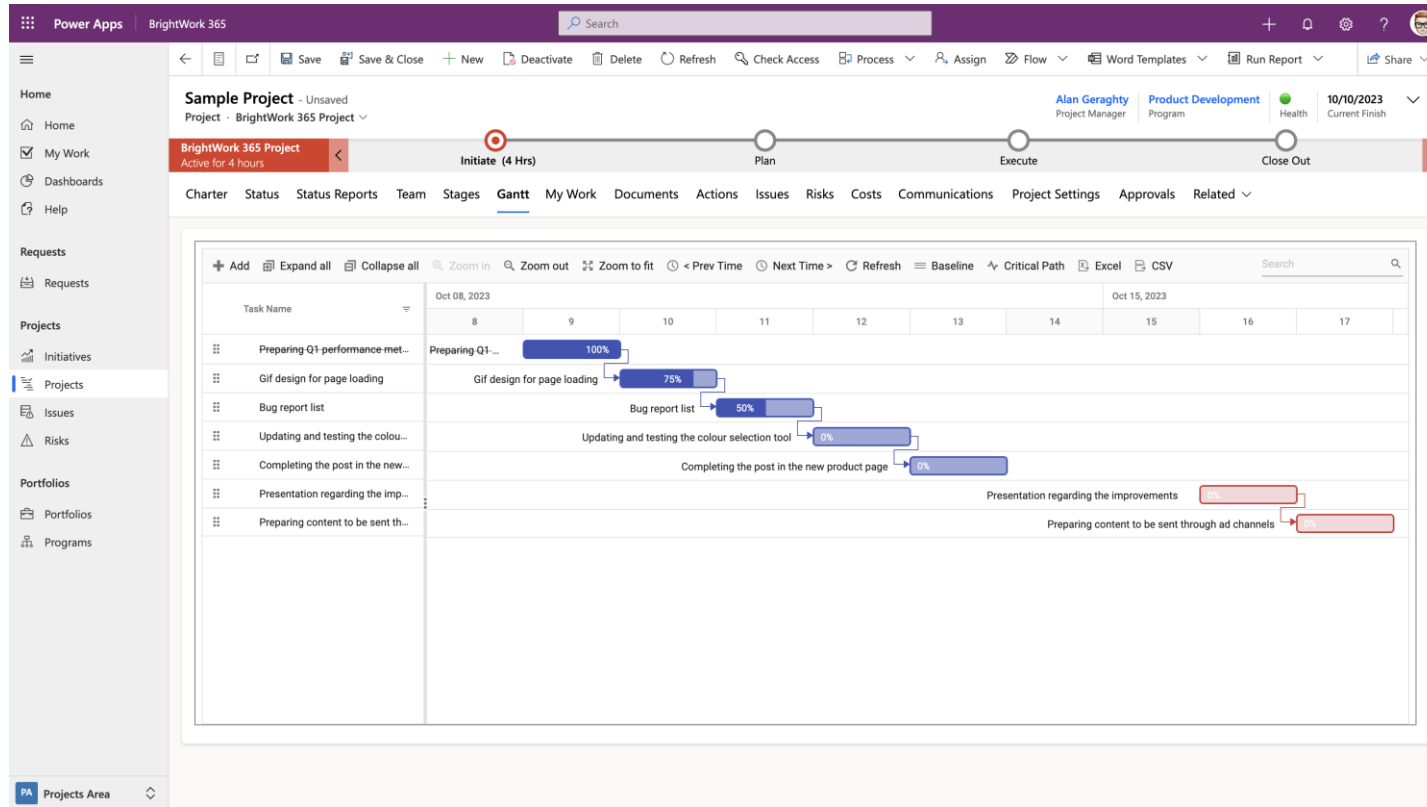


# Quick Poll

How many of you are  
using Microsoft 365?

3

Demo – Using Microsoft 365 for  
Status Reporting



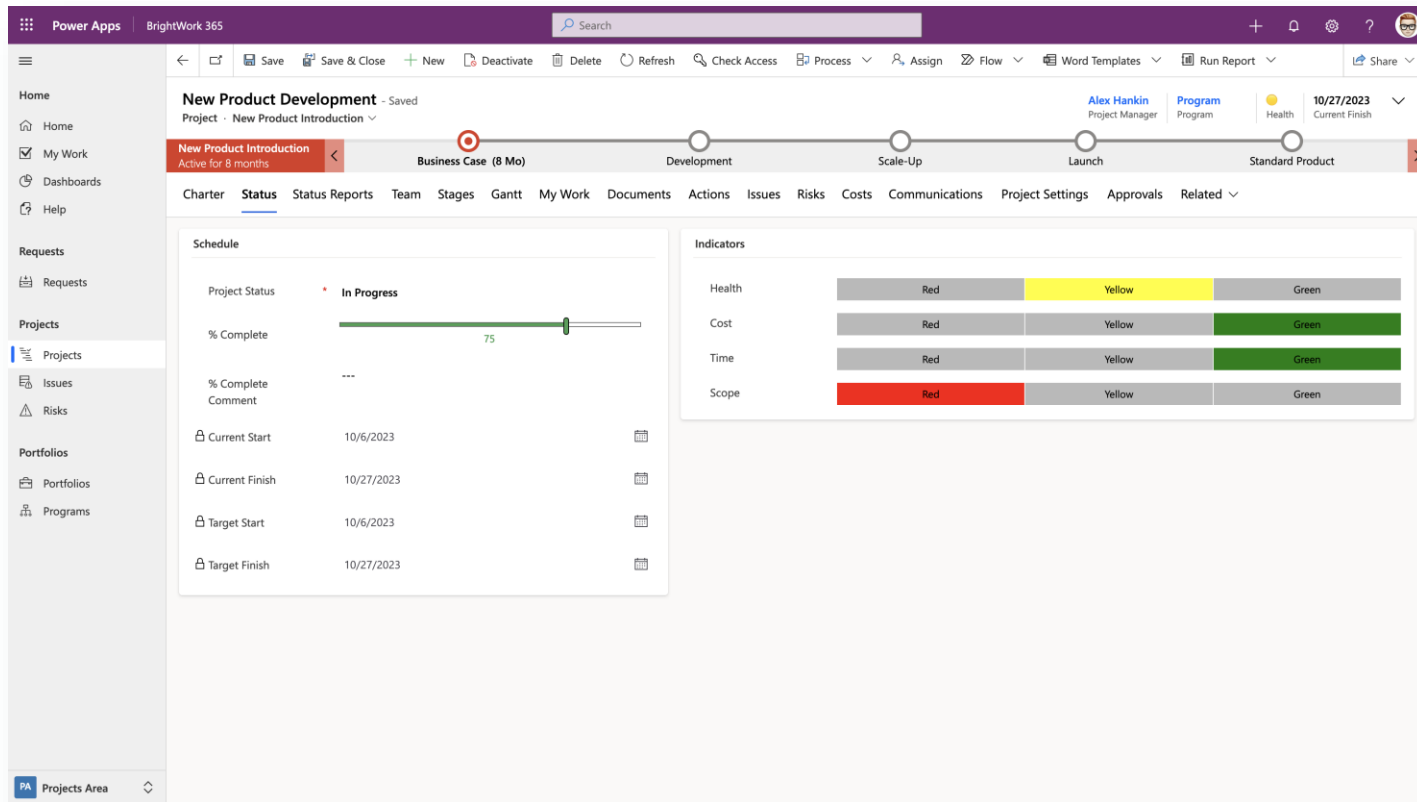
- Start every project the right way with flexible templates and familiar Microsoft 365 apps.
- Plan your project with a few clicks and manage the schedule with an interactive Gantt chart.

## Collaborate In a Team Focused Site

The screenshot displays the BrightWork365 interface within a Microsoft Teams environment. The left sidebar shows the 'Teams' section with 'BrightWork 365' selected. The main content area shows a project site for 'Graphic Design' with a navigation bar including 'Home', 'My Work', 'Dashboards', and 'Help'. Below this, there are sections for 'Requests' and 'Projects'. The 'Projects' section is active, showing a project card for 'Graphic Design' with details such as 'Created On: 2/7/2023 5:51 PM', 'Project Template: Marketing Project Standard', and 'Project Manager: Billy Guinan'. A progress bar at the top of the project card indicates the project is in the 'Execute (3 Mo)' phase, with 'Initiate' and 'Plan' phases completed. A red error message is visible: 'Portfolio: Required fields must be filled in.'

- Connect with your team, wherever and whenever they work. Set up project specific teams with emails, phone calls, appointments.
- Leverage collaborative features in Microsoft Teams to move work forward quickly.
- Work on project documents and deliverables together using SharePoint Online.

## Track and share progress with reports



- Instantly check the performance of your project with key reports on Tasks, Risks and Issues, and Status.
- Get rich insights with Power BI reports for the timeline, resource allocation, and tasks.
- Easily share the latest status report with stakeholders.



5 Essentials for making your  
reports required reading



Reports  
should be

1

**Relevant**

Informative, covers status and how it affects stakeholders

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## **Timely**

Up-to-date and date-stamped

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Trusted sources and trusted interpretations

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Don't report what you are guessing

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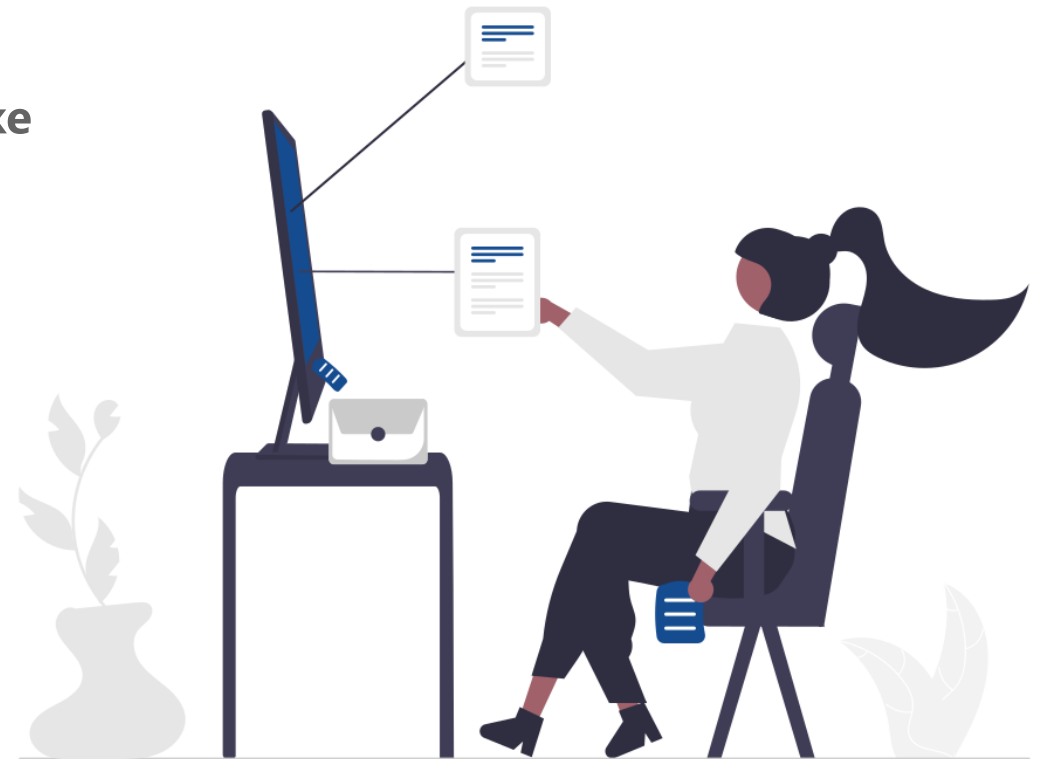
5

## **Clear**

Easy to understand with no hedging language

# Key takeaways

- **Make sure you are reporting for the right reasons**
- **Tailor the content to meet the expectations of the audience**
- **Use the most appropriate delivery method and make use of your tools**
- **Check reports are relevant, timely, trustworthy, accurate and clear**



# Questions!

Use the questions panel in  
GoToWebinar!

# THANK YOU

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