

How to Complete the Weekly Status Report.

Adapted from <http://croftsoft.com/library/tutorials/report/>

From : John Phillips on behalf of M&P Consulting
To : J.E.Marriott
Subject : Weekly Status Report, M&P Consulting, 2009-Sept-20

Assuming that the status reports will be sent by e-mail and then archived in message folders sortable by subject, using a consistent subject line format can make searching for a particular status report much easier.

Activities Planned for Last Week :

Task		Performed By	Estimated Time (hours)	
ID	Description		Task	Total
001	Read case study	All	1	4
005	Identify missing information	All	4	16
010	Develop interview questions	All	1	4
etc	Develop interview plan	All	1	4
	Interview Mr. Marriott	John, Michelle	1	2
	Interview Ms. Burchill	Denny, Cass	1	2
	Create interview reports	All	2	8
	Read case study			
Totals			11	40

This will always be a cut-and-paste verbatim copy of the content of the "Activities Planned for Next Week" section from the previous status report. Although redundant, this allows the report reviewer to quickly compare the activities projected with the activities actually accomplished as documented in the section immediately following.

Task ID should match with Microsoft Project.

Activities Accomplished Last Week :

Task		Performed By	Actual Time (hours)	
ID	Description		Task	Total
etc	Read case study	All	1	4
	Identify missing information	All	4	16
	Develop interview questions	John, Denny, Cass	1	3
	Develop interview plan	John, Denny, Cass	1	3
	Interview Mr. Marriott	John	2	2
	Interview Ms. Burchill	Not completed	0	0
	Create interview reports	John, Cass	2	4
	Interview Mr London	Cass	1	1
	Meeting to discuss contingency plan	John, Denny, Cass	1	3
	Meeting to resolve performance issues	All	1	4
Totals			14	40

This section is the heart of the report. The accurate documentation of recent activities facilitates management by the employer and communicates progress to the client. It provides the employee with the opportunity to advertise his/her contributions and permits the contractor to justify the invoice.

The activities actually accomplished in the previous week may or may not have any relationship to what was planned. It is important to both the author(s) and the reviewer that actual activities are listed, regardless of whether planned or not, in order to validate and manage the consumption of time and labor.

Throughout the week the report author(s) will add items to this section as they are accomplished. This incremental approach ensures that all relevant activities are recorded and reduces the probability that a report will be delayed or skipped due to the difficulty of writing the report when memories have faded or the deadline is imminent.

Activities Planned for Next Week :

Task		Performed By	Actual Time (hours)	
ID	Description		Task	Total
etc	Interview Ms. Burchill	Michelle, Cass	1	2
	Interview Mr. Morris	John	1	1
	Observe Mr. London (service technicians)	Denny	3	3
	Create interview reports	All	2	8
	Develop high-level use cases	All	6	24
Totals			13	38

In this section, the report author records the anticipated activities for the coming week.

These planned activities should vary from week to week in sufficient detail that a reviewer can detect the rate of progress. For example, a very general planned activity such as "Work on user interface" can be uninformative if simply repeated week after week without breaking it down into subtasks.

This section has the effect of promoting the temporary cessation of activity for a moment of reflection and review. By requiring the report author to update this section on a weekly basis with relevant content, the exercise will lead to a reevaluation of short-term goals in light of the current project status and external forces.

An additional beneficial effect of this section is that it prevents misunderstanding and miscommunication between the developer and the project manager or client. In reviewing the planned activities for the next week as documented by the developer within the role of report author, the reviewer has the opportunity to clarify any misinterpretations of expectations and redirect short-term goals if necessary.

Summary :

After reading the case study, we brainstormed our understanding of the existing system, and identified a number of areas that needed further information or clarification. This lead to our interview plan for the week.

We had to deal with a non-performance issue by one of the team members. We believe the issue to be resolved, so at this time we do not expect to involve management intervention.

We discovered that we should not leave the scheduling of interviews too late. We were unable to meet with Ms. Burchill due to her schedule, so a number of key questions are unresolved. However, we were fortunate to be able to meet with Mr. London, which has allowed us to explore his role earlier than we expected.

In conclusion, we believe in the balance we are on schedule. We look forward to developing our first high-level use cases next week.

A general executive summary of “where you are”. Topics you may want to address include...

“Problems Encountered”	Readers are always interested in problems faced / overcome.
“Critical Issues”	If you’re off schedule, mention your new schedule and explain how you will be able to meet the deadlines.
“Conclusion”	End on a positive note, if possible. If you have serious concerns about your project, request a conference to discuss them. Otherwise, express confidence in your progress to date.
“DO NOT LIE”	Be positive, don’t “accuse”, but be factual! Also, omission of critical facts is considered unethical (if you had covered up Michelle’s non-performance).

Timesheet :

Name	Hours Previous	\$ Previous	Role Last Week	Hours Last Week	\$ Last Week	Hours To Date	\$ To Date
John Phillips	20	1000	PM	13	650	33	1650
Denny Doherty	15	450	Dev	9	270	24	720
Michelle Phillips	10	300	Dev	6	180	16	480
Cass Elliot	18	540	Dev	12	360	30	900
Total							3750

Note:

Project Manager : \$50 / hour
Developer : \$30 / hour

Absences

Name	Vacation Hours Previous	Vacation Hours This Week	Sick Hours Previous	Sick Hours This Week	“Other” Hours Previous	“Other” Hours This Week	
John Phillips	2	0	0	0	0	0	
Denny Doherty	0	1	1	0	0	0	
Michelle Phillips	4	0	4	0	0	4	
Cass Elliot	0	2	0	0	0	0	

For each team member, document the reason for [“Other” Hours This Week] here...

Michelle Phillips – absent for 4 of 6 class hours. Personal reasons, undisclosed. Discussed with Mr Marriott during a meeting Sept. 26.