Chapter 17

Progress Reports

A progress report, an update of a proposal, is a document in which you tell the readers how a project is proceeding and speculate on how it will conclude. For brief, inexpensive projects, there might be no progress report at all, or it might be a phone call, a brief memo, or a table listing tasks completed, tasks remaining, and comments. For a lengthy, expensive project, progress might be reported in a series of long, formal reports submitted monthly or quarterly.

The challenge of writing a good progress report is to communicate the information clearly and honestly.

Clarify the Context

A progress report is an opportunity for you to check in with your reader after the project has begun but before it is complete. Your first task in writing a progress report is to make sure your readers understand that the document *is* a progress report.

Isn't it obvious? It is to you, but it might not be obvious to your reader. The reason for this is that you as the writer are steeped in the project; it is likely to be your main task at work or even your only task. Your readers, however, might have a dozen other projects going and are likely to have forgotten the details of your project—or forgotten the project entirely. Therefore, you need to be extremely clear and specific in clarifying the context of the progress report. Make sure you communicate two pieces of information effectively:

- *The housekeeping details.* If you are using a memo format, put the phrase "progress report" in the subject heading; if you are using a report format, put that phrase in the title. Also indicate the number of the progress report and the intervals you are using: "This is the third monthly progress report in the high-definition TV screen display research project."

- *The background of the project.* To be safe, assume that your reader has forgotten the broad outlines of the project. Include any background discussions and the problem-definition statement from the original proposal. (The progress report is the kind of document that exploits the potential of the word processor, for you can copy the proposal and then update it.) If you use clear headings, your readers can skip over any sections they don't want to read.

Explain the Progress Clearly

The heart of the progress report is your answer to the readers' question, "What have you done for me lately?" and your speculation about future work on the project.
Two patterns of organization are used commonly:

Time

Perhaps the simplest pattern is based on the passage of time. In an outline form it looks like this:

1. work completed
2. future work

Some writers sandwich in a third category, "present work," which enables them to focus on the tasks they're working on at the moment. Other writers don't recognize a present tense; either the work is done, in which case it's in the past, or it isn't done, in which case it's in the future.

You can add subheadings based on the nature of the project. The most common approach calls for a time breakdown:

> 1. work completed
>   1.1 task A
>   1.2 task B
> 2. future work
>   2.1 task A
>   2.2 task B

The time pattern works well for relatively simple and short progress reports or for those that involve few different tasks.

Task

The task pattern is the time pattern turned inside out:

> 1. task A
>   1.1 work completed
>   1.2 future work
> 2. task B
>   2.1 work completed
>   2.2 future work

The task pattern works well with more complicated, longer progress reports, especially those with numerous tasks being carried out at the same time. In such cases, the organizational focus on the separate tasks results in a clearer presentation.

Explain the Progress Honestly

As I mentioned in Chapter 1, honesty is the chief characteristic of effective workplace writing. I want to mention honesty again at this

point because progress reports pose a great temptation for a writer to lie or mislead.

The reason for this is simple: nobody likes to be the bearer of bad tidings. You don't want to disappoint your readers, and you don't want to get in trouble for not delivering what you promised in the proposal. So it is tempting to put a positive spin on the project and hope that in the remaining time you can make up for any problems. This kind of thinking isn't fully logical, of course, but even writers who have been disappointed a dozen times before often find it irresistible.

It's best to be honest for two reasons:

- *Ethical.* You owe it to your readers to be honest with them, just as you want them to be honest with you.
- *Practical.* If you're honest and things don't go as you hope, you can be accused of having been overly optimistic at the start of the project, of having been the victim of bad luck, or even of having made mistakes in doing your work. But none of these accusations is likely to prove fatal; usually, you are in serious trouble only when it is also discovered that you weren't straightforward in the progress report.

In thinking about honesty in progress reports, consider that the earlier you tell your readers that things aren't going according to plan, the better they will be able to accommodate the bad news. You are worrying about your own project, but they might well be trying to coordinate your project and half a dozen others. For this reason, you should be sure to be forthcoming about three important aspects of the project:

- *Time.* No matter how many projects you've worked on and how many times you've found yourself slipping even further behind schedule, it's only natural to hope that in *this* project you can make up the lost time. But if you lost 10 days in the first half of the project, it's more likely that you'll lose another 10 in the second half than that you'll make up the first 10.
- *Money.* This one is easy to talk about: if you suspect you are going to need extra money, the earlier you explain it to your readers, the more likely you are to get it.

■ *Outcome.* If the final outcome of the project is not going to be what you promised, tell your readers as soon as possible.

The bottom line is that you don't want your reader to ask you why you didn't announce the bad news earlier.

Figure 17–1 is the body of the progress report by the engineer working for the rail system.

Summary:
The work is proceeding on schedule. I have chosen the four cars on which to install the panels and have built the panels themselves. I still have to install them in the cars. I expect the project to be completed, as specified in the proposal, on time.

Introduction:
This is the progress report on the first week's work on the project to build and install electronic panels on the General Electric cars to indicate the state of pertinent relays at the time of the No Power fault.

Work Completed:

■ Task 1. Choosing the Four Cars on Which to Install the Panels
   To monitor the number of No Power faults occurring on General Electric rail cars, I have reviewed the Daily Hit Sheets for the past six months. The Daily Hit Sheets list in-service failures by car, and they report the time and type of failure. I wanted to know not only which cars had repeated No Power faults within the last six months, but also which cars were still listed as un-repaired by the Mechanical Department. Whenever a car is listed on the Daily Hit Sheet, it is checked out by yard mechanics. If they cannot find a defect, they use a No Defect Found code on the repair work order. From this information, I have chosen Regional Rail cars #9019, 326, 127, and 114 for modification. These four cars were failing at an average rate of every 15 days and therefore would be most likely to develop a No Power fault within the one-month trial period of the panel modification. This task, therefore, is complete.

■ Task 2. Building and Installing the Electronic Panels
   I have completed building the electronic panel to indicate the state of pertinent relays at the time of the No Power fault. This panel will hold information in memory to be used to determine

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the actual problem that occurred on the car. Bench tests on the panels indicate that they are working according to specifications. The first half of this task, therefore, is complete.

Future Work:

■ Task 2. Building and Installing the Electronic Panels
Now that the electronic panels have checked out satisfactorily, I have to install them in the four cars and check them again. This portion of the task should be completed by the end of this week.

Conclusion:
The project is proceeding on schedule, without any unanticipated problems. I expect the project and its accompanying report to be completed on schedule.

Figure 17–1   Body of Progress Report (Source: Schiller [1992])

Reference

Schiller, D. 1992. Progress report on the project to modify the propulsion circuit on regional rail cars. Unpublished document.