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TSP Project Status Report - Specification STATUS  
**Conducting the Status Meeting**

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| --- | --- |
| Purpose | The purpose of this document is to provide guidance for preparing accurate, complete, concise, and informative management status reports. |
| General | Frequent and informative management reports are essential for keeping management informed of project status.  Management can best help the project when they thoroughly understand its status, risks, and issues. |
| Meeting  Frequency | Status meetings should be held weekly, biweekly, or monthly, as determined by management and the team. |
| Meeting Format | Be guided by management's preferences and interests.  A consistent format conserves preparation and meeting time. |
| Agenda and  Problems | Briefly cover the meeting agenda.  State at the outset any key issues or problems to be raised. |
| Project Overview | Unless *all* management attendees are familiar with the material, briefly summarize the project and its products. |
| Schedule Status | Succinctly describe the project's status versus its plan.  Show cumulative and actual hours to date, and describe actions planned to address any resource problems.  Show the earned value plan, actual performance, and projections. Describe actions planned to address any schedule problems. |
| Quality Status | Briefly describe the quality plan.  Show data on quality performance versus plan, and describe actions planned to address any quality problems. |
| Risks and Issues | Describe the principal project risks and issues and what is being done to address them.  Describe where management's help is needed and precisely describe what help you believe they can provide. |
| Prior Action  Items | Summarize the action item status from the last meeting.  Discuss all delinquent actions and next steps. |
| Current Action  Items | Review the action items from this meeting, including who, what, and when. Test whether there is agreement about the summary.  Review the decisions that were made during the meeting and who made them. Test whether there is agreement. |
| Meeting Report | After the meeting, briefly summarize the meeting decisions and planned actions in a written report.  Distribute the report to all attendees and file a copy in the project notebook. |

*Continued on next page*

**TSP Project Status Report - Specification STATUS, cont.  
Report Contents**

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| Introduction | This page of the document describes report content. Some of the elements listed below as report content are described more fully on the previous page. |
| Suggested Approach | Unless management suggests otherwise, present the basic report as part of management reviews.  Be prepared with the full report materials and present them only in response to questions. |
| Minimum Report Contents | At a minimum, the status report must include the following:   * schedule status versus plan (use EV) * planned actions to resolve any schedule issues * any major risks and mitigation actions * any outstanding actions from prior meetings |
| Basic Report  Contents | You should have a basic report ready to present at any time. The basic status report should include the following.   * schedule status versus plan (use EV) * planned actions to resolve any schedule issues * planned versus actual weekly hours * staffing problems and needed actions * any major risks and mitigation actions * any outstanding actions from prior meetings |
| Standard Report Contents | Be prepared to present the standard report every week. The standard status report should include the following.   * schedule status versus plan (use EV) * projected phase completion date * planned actions to resolve any schedule issues * planned versus actual weekly hours * staffing problems and needed actions * basic quality status (inspection rates, review rates, defect levels, and to-date yields versus the quality plan) * a review of all major risks and mitigation actions * the status of the actions from prior meetings |
| Full Report Contents | Be prepared to present the full report on request. The full status report should include the following.   * schedule status versus plan (use EV) * projected phase and overall project completion dates * planned actions to resolve any schedule issues * planned versus actual weekly hours * staffing problems and needed actions * basic quality status (inspection rates, review rates, defect levels, and to-date yields versus the quality plan) * projected phase quality levels and PDF (defects per KLOC and percent defect free) * a review of all the major risks and mitigation actions * the status of the actions from prior meetings |

**TSP Project Status Report - Specification STATUS, cont.  
Suggestions for Presenting Status**

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| Agenda and  Problems | First, briefly cover the meeting purpose and agenda.   * State any key issues or problems to be raised. * Do not surprise management by postponing discussion of problems until the end of the presentation. Describe the problem and say you will later discuss how to handle it. (However, if management expresses a desire to discuss the problem immediately, be prepared to do that.). |
| Remind of Prior Status and Actions | Do not assume that management recalls specifics of prior meetings.   * Summarize the actions, the responsible party,, and status. * Where management has not taken action on a commitment, describe the impact on the project. * Do not place blame; be factual and objective. * It is generally wise to discuss your and the team's shortcomings before reviewing management failings. |
| Move Briskly Through the Material | Management is typically very adept and quick-to-grasp the presentation content..  Cover the material at a brisk, consistent pace while being complete and factual.  If you feel that you must explain something, put it in the backup materials and only cover it if requested.. |
| Use Plain Language | Avoid using technical terms that management may not understand. |
| Be Crisp | At the end of the meeting, briefly summarize the decisions made and actions to be taken, by who, and when. |
| Stop When They are Done | Once you have covered the key points and management indicates they have heard enough, stop even if you have not covered all the material.  When presenters continue at this point, they often lose the “sale,” even when management has previously agreed. |
| Make Sure You Understand Management | If you do not understand a decision, obtain clarification.  Do not leave the meeting confused about any management decisions that affect the team.  If you are confused, management may have misunderstood you. |
| Bring Lots of Backup | Leave all the details out of the main presentation.  Bring backup materials to cover questions management might ask.  Management will be impressed if you have anticipated their questions and have brought backup material to cover them. |