Successfully Present Your Projects

Your Guide to Presenting Projects

Highlights

The need for clear, concise project reports

Project managers deal in details; management wants a snapshot. How can you translate your project details into a brief summary which clearly conveys the status of the project?

This guide offers methods for how to create clear, concise project reports along with a few tips on what to report when you don't know where to start.
On the pages which follow, you will learn more about these areas:

♦ The *ready-for-prime-time* project status report

♦ What to report when you don't know where to start

♦ Budget status presentations

♦ Get the most information on a single-page report

♦ Viewer-friendly earned value reports

♦ Summary reports with drill-down

♦ Baseline and current schedule reports

♦ Major milestone summary reports

Sponsored by: KIDASA Software * www.kidasa.com
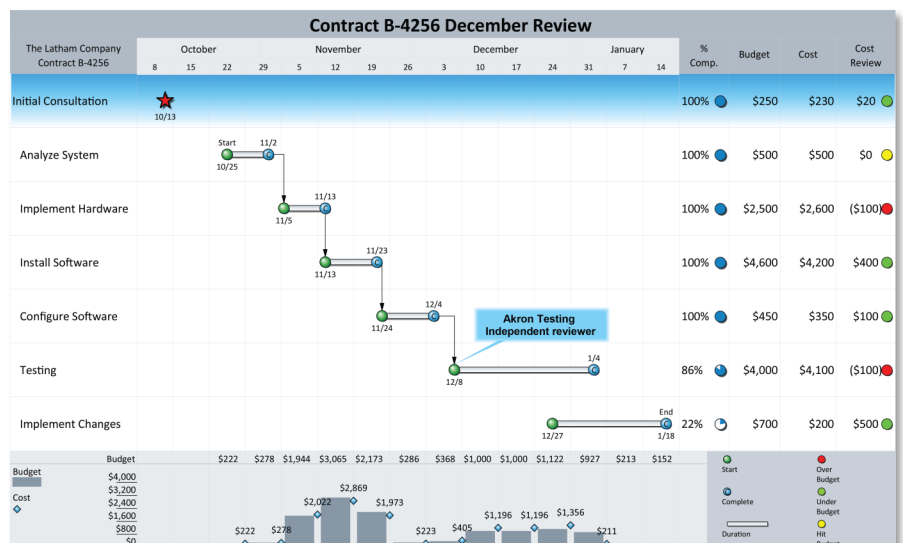
Is your project presentation ready for prime time?

Your presentation report is finished. You are ready for the status meeting with your client.

Or are you?

After creating a presentation report, ask yourself:

♦ Does the report explain itself, or need minimal explanation? While you won't just say, "Here's the report...see you later," a professional presentation will be easy to read with clearly defined content.

♦ Can it be interpreted in more than one way? Generally, a good project report will be interpreted objectively. Items on the presentation chart should be unambiguous and easy to read with minimal explanation.

♦ Is the report flexible enough to respond to your audience's questions? A flexible report can show a project overview with the ability to drill-down to the details when needed. Or, if the customer asks, "If Date X changes, what will be the impact on Date Y?" Can your report show the impact on dependencies?

♦ Can you distinguish between projects, phases and tasks? An indented outline, as well as text styles and highlights, clearly separate areas of the project report.

PROJECT REPORT CHECKLIST

The project report is:

- Objective.
- Clear and concise.
- Easy to interpret.
- A summary of key project indicators.
- Separated into distinct areas of focus.
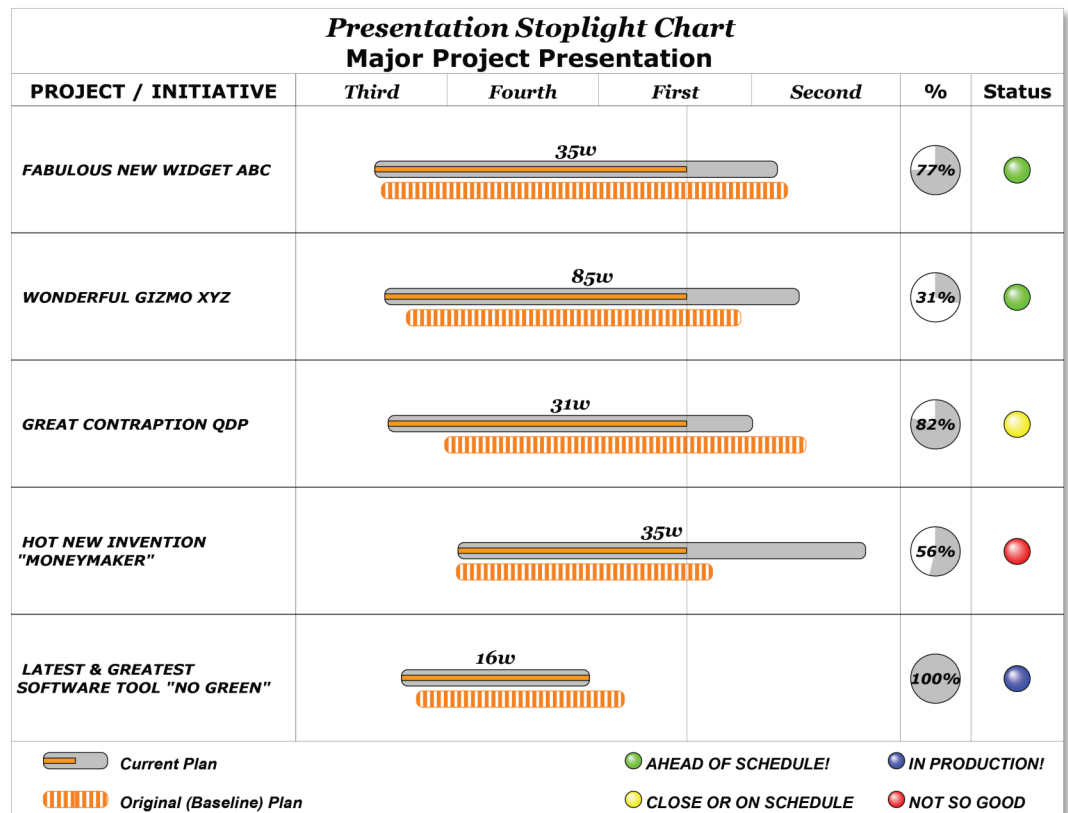- Be prepared with detail about all tasks and projects.

SAMPLE REPORT

In this sample report, it's easy to see at-a-glance how five projects are doing.

The legend clearly explains the meaning of all items on the schedule and provides an excellent overview of 5 projects.

The "pie indicators" show the % complete for each project and the stoplights show overall status.

This schedule is ready for prime-time!

Presentation Stoplight Chart
Major Project Presentation

PROJECT / INITIATIVE	Third	Fourth	First	Second	%	Status
FABULOUS NEW WIDGET ABC		35w			77%	🟢
WONDERFUL GIZMO XYZ		85w			31%	🟢
GREAT CONTRAPTION QDP		31w			82%	🟡
HOT NEW INVENTION "MONEYMAKER"		35w			56%	🔴
LATEST & GREATEST SOFTWARE TOOL "NO GREEN"	16w				100%	🔵

Current Plan
Original (Baseline) Plan

🟢 AHEAD OF SCHEDULE!   🔵 IN PRODUCTION!
🟡 CLOSE OR ON SCHEDULE   🔴 NOT SO GOOD

"When I am working on a problem I never think about beauty. I only think about how to solve the problem. But when I have finished, if the solution is not beautiful, I know it is wrong."

— Buckminster Fuller, architect, engineer

Present projects clearly using consistent symbology

Project communication is clearer if consistent symbology is used for your project presentations. You will spend less time explaining the meaning of the symbols on your schedule and will have more time available to clarify your project's progress.
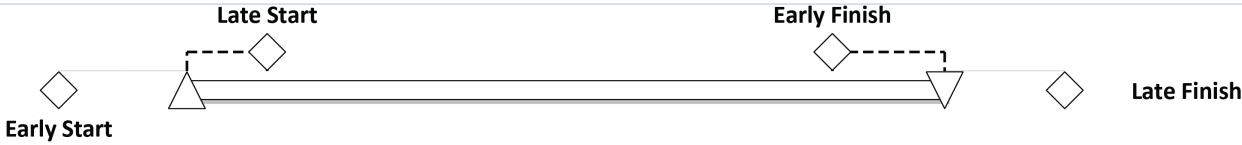
While there is a wide variety of project management symbology to choose from, and it's unlikely that all companies and government agencies will ever agree to a standard set of symbology, project managers should make an attempt to come up with a standard set of symbology to use throughout their organization for the duration of their project.

In a big company, it is a good idea to agree on standard company-wide project symbology so that executives who attend many project status presentations do not have to be briefed on the significance of the symbology before each presentation.

If a circled red diamond means "critical" for project A, it should not mean "completed" for project B.

Here are some simple guidelines:

- Use simple, intuitive symbol and bar choices.

- Be consistent in applying the symbology.

- Use color to distinguish between event types.

- Clearly define the meaning of each symbol in a legend.

⇧	Headquarter Controlled Milestone	⬆	Headquarter Controlled Milestone Complete
⇧	Major Milestone	⬆	Major Milestone Complete
△	Planned Start Milestone	▲	Completed Start Milestone
▽	Planned Finish Milestone	▼	Completed Finish Milestone
◇	Anticipated Slip (early or late)	◆	Completed Slip (early or late)

Late Start — Early Finish — Late Finish — Early Start

▭	Span of Activity / Baseline	▮▯	Progress of Activity
▬	Frontload Task	▬	Backload Task
◆—◆	Ramp Up	◆—◆	Ramp Down

Deliverable — **Complete** ✔ — **Critical** ◈ — **Cancelled** ⊗ — Critical Design Review (CDR) [C] — Program Design Review (PDR) [P]

Present projects clearly using consistent symbology

Scenario: Multiple Projects presented on one page.

Strategy:

♦ Show as much as possible in a condensed form.

♦ Use well known acronyms to conserve space.

♦ Keep the chart clutter-free for ease of presentation. Verbally present details.

In this case, since there is no legend, it is important that the audience be familiar with the acronyms.

Presentation Schedule - Summary of All Projects

	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Customer
Space Station																US Air Force
Booster																US Army
RPV																US Army
Strike System																US Navy
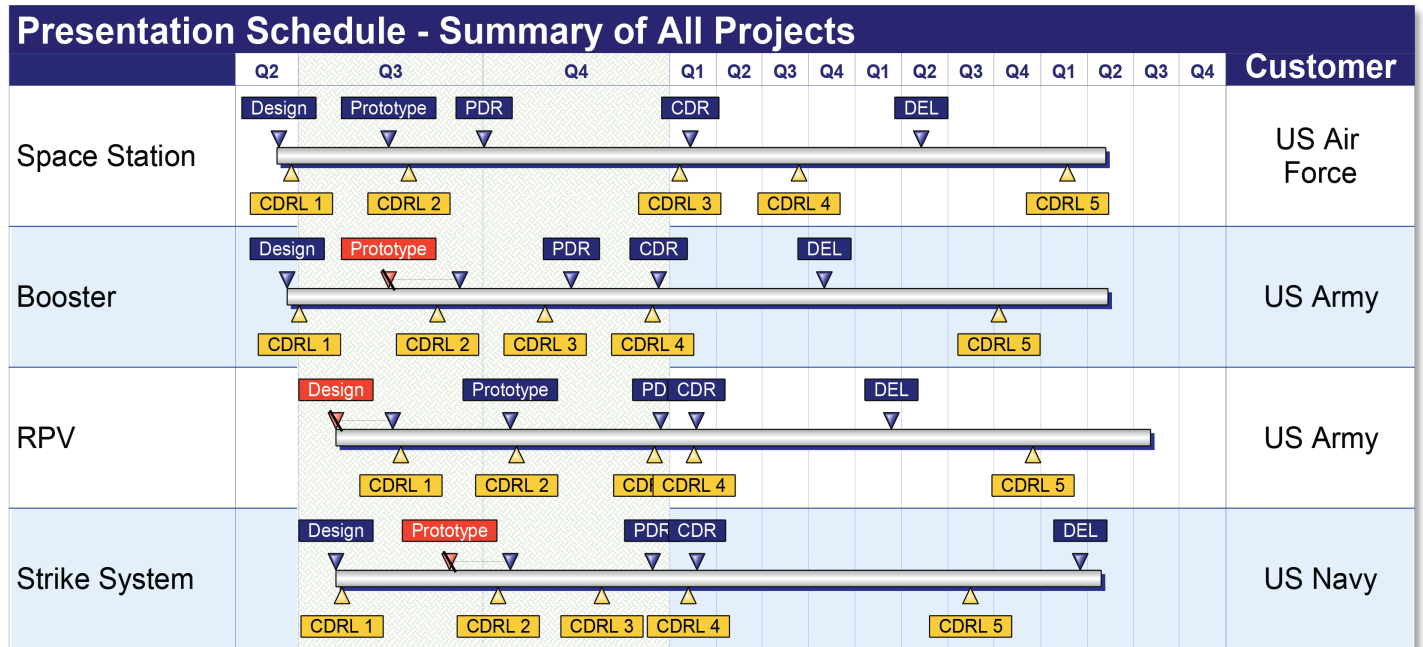
Scenario: Your management or your customer wants to see current project status compared to the original project plan.

Strategy:

♦ Show how each task is doing compared to the original plan. Compare the current plan bar to the baseline bar.

♦ Show the percent complete based on the amount of shading.

PROJECT REVIEW - BASELINE VS ACTUAL

TASKS	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	% Complete
PLANNING			54%								54%
INTEGRATION				58%							58%
OPERATIONS						33%					33%
ENGINEERING											0%

Baseline • Current Plan • Baseline Milestone • Milestone
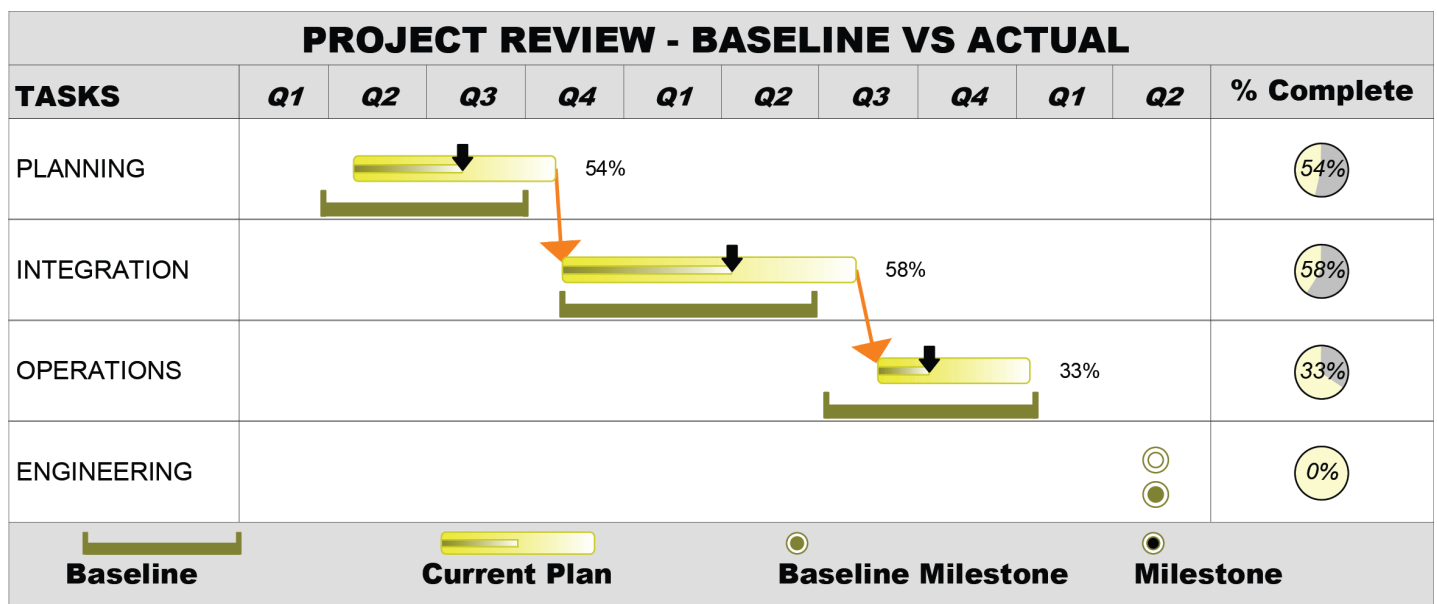
Highlight important milestones

Your project has 30,000 tasks and you are called on to make a project presentation. Obviously, passing out a 90 page report to meeting attendees isn't a great idea. However, depending on your project, you might be able to distill it down to a one-page chart similar to the one below:
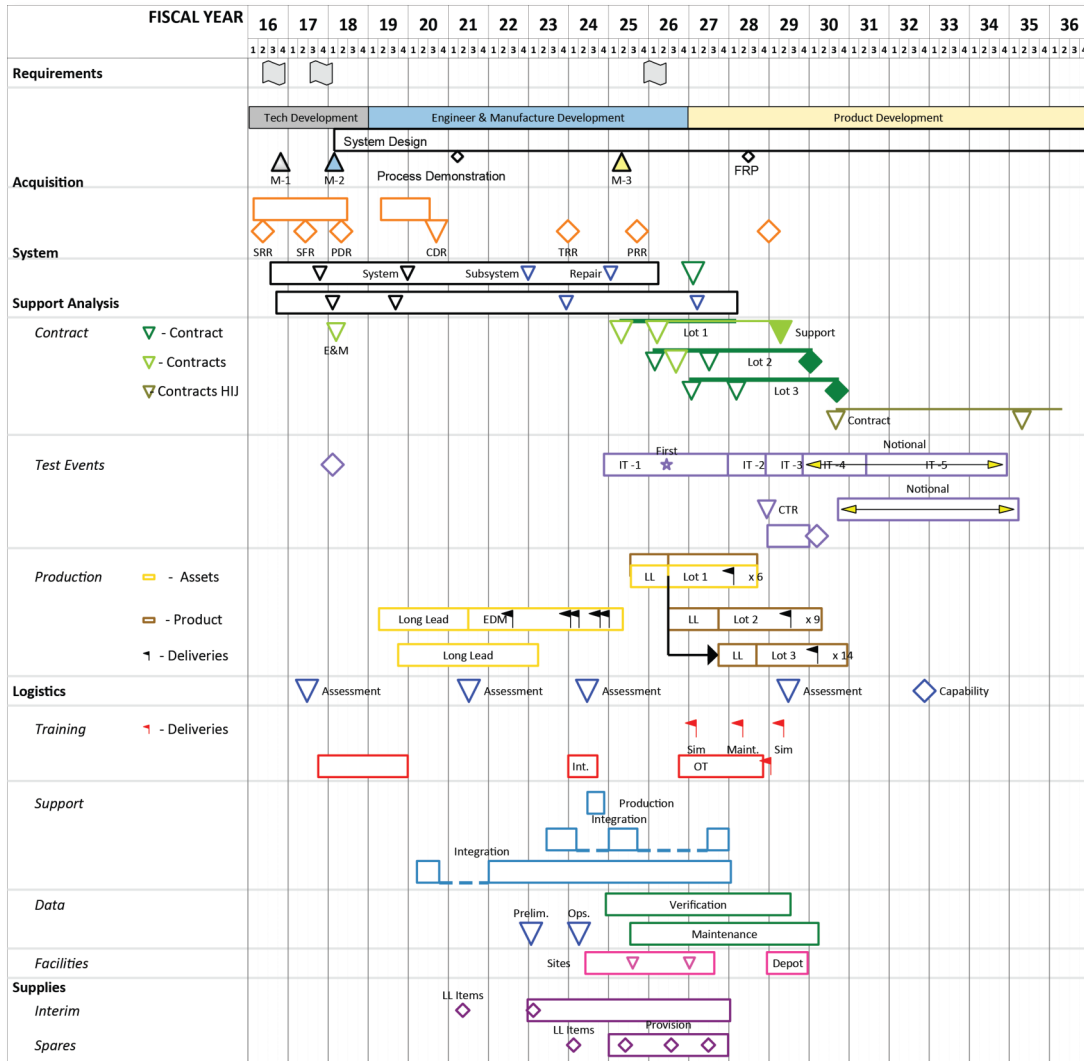
Here are some ideas to highlight key milestones on a presentation chart:

Change the color:

Add a marking:
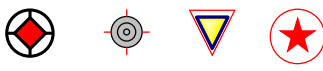
Use shapes which convey special meaning:

LAUNCH   SHIP   HQ MOVES TO TEXAS

Change the size:
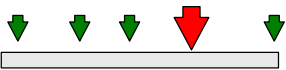
Use a pointer:
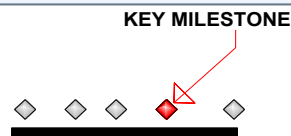
KEY MILESTONE

Move major milestones to summary row:

Report progress

The 18th century poet, Robert Burns, got it right when he wrote that well-meant plans will often change.

And your project report needs to display those changes against your original (well meant) plan.
So, how can you show both the original plan and the current plan on a single report?

One way is in the Projects Status Overview below:

Project Status Overview

| Plan Elements	Baseline Start	Actual Start	Start Variance		Baseline Finish	Actual Finish	Finish Variance	
Requirements	6/10	6/10	0	○	7/7	7/1	6	●
Planning	6/25	7/2	-7	●	7/22	7/26	-4	●
Design 1	7/23	7/23	0	○	9/12	9/22	-10	●
Design 2	7/23	7/28	-5	●	9/12	9/12	0	○
Prototype	9/18	9/23	-5	●	10/18	10/18	0	○
Implementation	10/20	10/20	0	○	12/7	11/30	7	●
Testing 1	11/12	11/12	0	○	1/7	1/15	-8	●
Testing 2	12/3	12/1	2	●	1/13	1/11	2	●
Redesign	1/16	1/16	0	○	2/26	2/26	0	○
Testing	2/27	3/2	-3	●	4/13	4/13	0	○
Manufacture	4/14	4/14	0	○	5/20	5/20	0	○

Legend: Actual | Actual Complete | Baseline

Current Date Thu. Dec. 08

♦ Baseline versus actual symbology is shown.

♦ Calculation indicator columns showing the start and finish variance which compare the baseline dates to the actual dates.

♦ Value differences appear in the variance columns along with an indicator showing whether the baseline dates were met. Yellow = baseline and actual dates were the same. Green = actual dates were better than expected. Red = actual dates did not meet expectations.

Reporting progress (continued)

Presenting baseline and current progress offers one set of information, but it's possible to present even more status information concisely.

In the schedule below:

♦ By default status is to the current date (dashed gold line).

♦ A status symbol (gold arrow) is added to the tasks that are ahead or behind the current date.

♦ A Status Date SmartColumn fills based on the current date or the placement of the status symbol.

♦ The percent complete of each task is shown by the filling in of the symbols and bars up to the status date.

♦ A Percent Complete SmartColumn shows each task's percent value and a percent pie symbol.

♦ An Ahead/Behind SmartColumn shows the days ahead or behind along with an indicator, red to show tasks that are behind, yellow to show task on track, or green to show tasks that are ahead.

Tracking Status with Milestones Professional

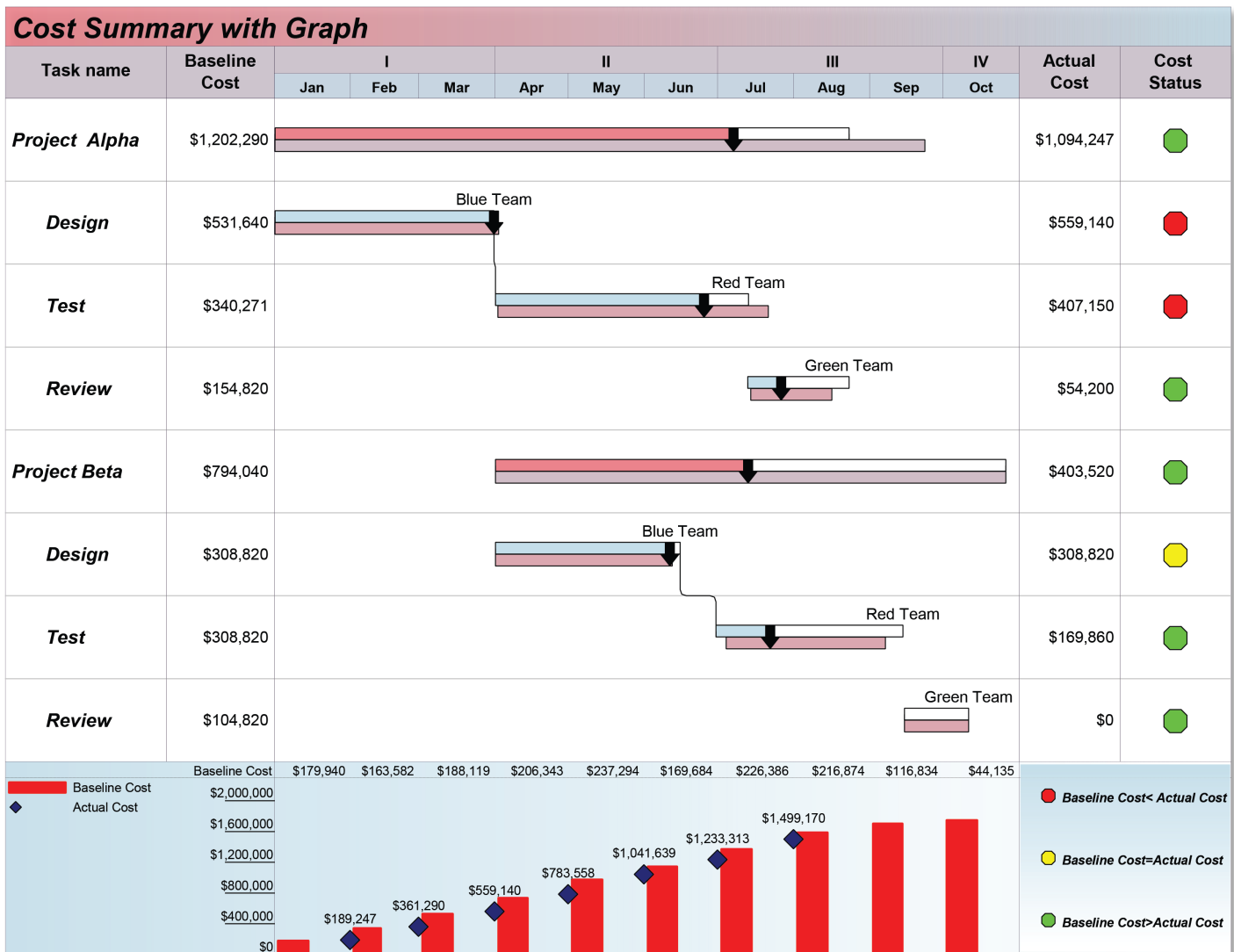| Task	Jan	Feb	Mar	Apr	May	Jun	Jul	% Complete	Status Date	Ahead / Behind
All Projects								48%	Monday 4 /15	0d
Project A								52%	Saturday 4 /13	-5d
Task A1								65%	Friday 4 /05	-12d
Task A2								53%	Wednesday 4 /17	0d
Task A3								46%	Monday 4 /08	-9d
Task A4								46%	Friday 5 /03	16d
Project B								44%	Wednesday 4 /24	5d
Task B1								54%	Saturday 4 /06	-11d
Task B2								39%	Wednesday 4 /17	0d
Task B3								45%	Wednesday 4 /17	0d
Task B4								40%	Friday 5 /03	16d

Report Project Costs

Nobody has to tell a project manager that cost is a key consideration when managing a project. No doubt the project manager dreams about budget vs. actual, cost over-runs and so on.

When presenting a project, executives will often be interested in key cost indicators.

In the Milestones Professional schedule below:

♦ Baseline Cost and Actual Cost values are entered for each task.

♦ The Cost Status column is a Milestones Professional Calculation/Indicator column. The simple calculation Baseline Cost – Actual Cost is done and a stoplight is added. Red = Actual Cost > Baseline Cost , Yellow = Baseline Cost = Actual Cost and Green = Baseline Cost < Actual Cost.

♦ Baseline Cost (red bar) and Actual Cost (points) are graphed cumulatively below the schedule.

Cost Summary with Graph

Task name	Baseline Cost	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Actual Cost	Cost Status
		I			II			III			IV		
Project Alpha	$1,202,290											$1,094,247	🟢
Design	$531,640	Blue Team										$559,140	🔴
Test	$340,271				Red Team							$407,150	🔴
Review	$154,820							Green Team				$54,200	🟢
Project Beta	$794,040											$403,520	🟢
Design	$308,820				Blue Team							$308,820	🟡
Test	$308,820							Red Team				$169,860	🟢
Review	$104,820									Green Team		$0	🟢

Baseline Cost: $179,940 $163,582 $188,119 $206,343 $237,294 $169,684 $226,386 $216,874 $116,834 $44,135

Legend:
- Baseline Cost (red bar)
- Actual Cost (blue diamond)

$2,000,000
$1,600,000
$1,200,000
$800,000
$400,000
$0

Actual Cost values: $189,247 $361,290 $559,140 $783,558 $1,041,639 $1,233,313 $1,499,170

🔴 Baseline Cost< Actual Cost
🟡 Baseline Cost=Actual Cost
🟢 Baseline Cost>Actual Cost

Add indicators for "at-a-glance" understanding

In a report that contains extensive data, how can action-items be quickly highlighted and addressed?

Indicator symbols are a great method for determined, at-a-glance, which project items need attention.

In the schedule below:

♦ The Ahead/Behind SmartColumn displays values along with built in predesigned circle indicators red indicating negative values, yellow indicating zero values and green indicating positive values.

♦ The % Complete SmartColumn shows percent values with pie shaped indicators.

♦ The Contractor column is a Values SmartColumn that looks at the text in the Task column and fills the cells with color and text accordingly. For example, if the task contains "**Excavation**" the cell is colored purple and the Daren Digs is shown as the contractor.

♦ The Cost column is a Stoplight SmartColumn. Cells are filled with indictors based on the number entered in the cell. **1** = green dollar, **2** = red thumbs down and **3** = gold check mark.
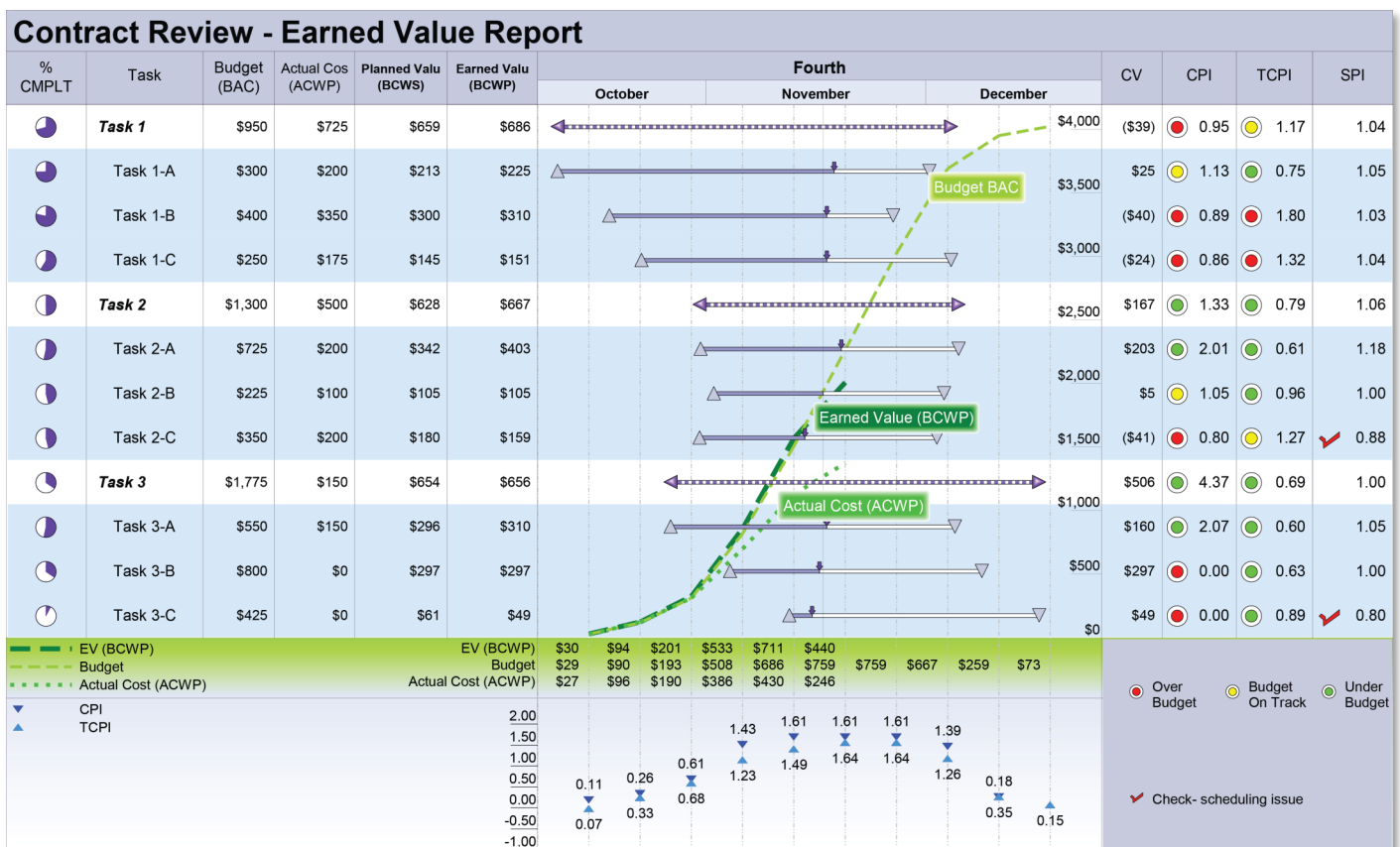

Tips for indicator symbols:

• Use distinct shapes and colors to clearly separate one indicator from another

• Rely on the indicator's shape, not color, when printing to black & white

• Clearly define the indicators in a legend

• Use logical symbols, such as check-marks for completed activities

• Display "pie fills" to show percent complete.

Present Earned Value

"Earned value is the objective measure of work completed." Tell that to a lay audience and you'll get blank stares.

Show them a graph of earned value as it compares to cost and budget, and you'll get a better response.

In the schedule below:

♦ The graph shows **Earned Value (BCWP)** is more than or equal to the **Budget (BAC)** which is more than the **Actual Cost (ACWP)**...which means this contract is in great shape!

♦ For additional detail, numbers that drive the graph are available in columns with some columns providing indicators for at a glance review of the Earned Value metrics.

♦ On the following page the information in the schedule is used to generate a variety of Earned Value Reports.

Contract Review - Earned Value Report

% CMPLT	Task	Budget (BAC)	Actual Cost (ACWP)	Planned Value (BCWS)	Earned Value (BCWP)	CV	CPI	TCPI	SPI
	Task 1	$950	$725	$659	$686	($39)	● 0.95	○ 1.17	1.04
	Task 1-A	$300	$200	$213	$225	$25	○ 1.13	● 0.75	1.05
	Task 1-B	$400	$350	$300	$310	($40)	● 0.89	● 1.80	1.03
	Task 1-C	$250	$175	$145	$151	($24)	● 0.86	○ 1.32	1.04
	Task 2	$1,300	$500	$628	$667	$167	● 1.33	● 0.79	1.06
	Task 2-A	$725	$200	$342	$403	$203	● 2.01	● 0.61	1.18
	Task 2-B	$225	$100	$105	$105	$5	○ 1.05	● 0.96	1.00
	Task 2-C	$350	$200	$180	$159	($41)	● 0.80	○ 1.27	✔ 0.88
	Task 3	$1,775	$150	$654	$656	$506	● 4.37	● 0.69	1.00
	Task 3-A	$550	$150	$296	$310	$160	● 2.07	● 0.60	1.05
	Task 3-B	$800	$0	$297	$297	$297	● 0.00	● 0.63	1.00
	Task 3-C	$425	$0	$61	$49	$49	● 0.00	● 0.89	✔ 0.80

Graph labels: Budget BAC, Earned Value (BCWP), Actual Cost (ACWP)

Graph vertical axis: $4,000 / $3,500 / $3,000 / $2,500 / $2,000 / $1,500 / $1,000 / $500 / $0

Columns: October, November, December (Fourth quarter)

Legend:
- ━ ━ EV (BCWP)
- ─ ─ Budget
- ⋯ ⋯ Actual Cost (ACWP)
- ▼ CPI
- ▲ TCPI

		Oct			Nov			Dec		
EV (BCWP)		$30	$94	$201	$533	$711	$440			
Budget		$29	$90	$193	$508	$686	$759	$759	$667	$259	$73
Actual Cost (ACWP)		$27	$96	$190	$386	$430	$246			

CPI/TCPI chart values (axis 2.00, 1.50, 1.00, 0.50, 0.00, -0.50, -1.00):
0.11, 0.07, 0.26, 0.33, 0.61, 0.68, 1.23, 1.43, 1.49, 1.61, 1.64, 1.61, 1.64, 1.61, 1.39, 1.26, 0.18, 0.35, 0.15

Indicator legend:
- ● Over Budget
- ○ Budget On Track
- ◉ Under Budget
- ✔ Check- scheduling issue

For information on presenting earned value, download KIDASA Software's free e-book
[Successfully Presenting Earned Value](#).

Present Earned Value

Get even more earned value detail with a variety of Earned Value reports which include graphics.
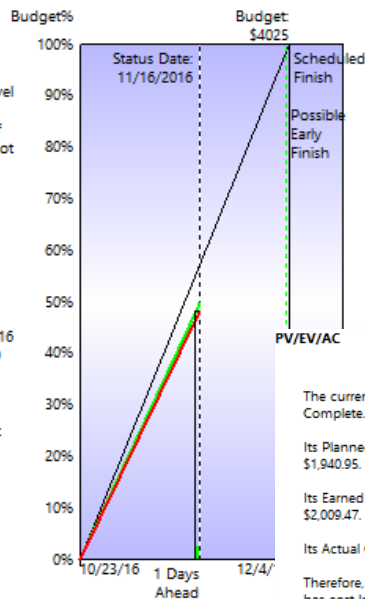
EV Schedule Status

This report obtains the start/end date of the project from the first row, which is assumed to be a level 1 summary row whose start/end dates represent the entire span of the project. If the first row does not contain the start/end date of the project then select the row that does before selecting this report. Currently using start/end dates from row 4.

The current project is 49.92% Complete.

As of the Status Date of 11/16/2016 its Earned Value is currently $2009 and its Planned Value is currently $1941.

This graph shows that the project may be 1 days ahead. Note that this prediction is not based on critical path and thus should not be considered an absolute indicator of schedule variance.

Budget% Budget: $4025
Status Date: 11/16/2016 Scheduled Finish / Possible Early Finish
10/23/16 1 Days Ahead 12/4/

PV/EV/AC

The current project is 49.92% Complete.

Its Planned Value is currently $1,940.95.

Its Earned Value is currently $2,009.47.

Its Actual Cost is currently $1,375.00.

Therefore, at this time the project has cost less than planned and has earned more than planned.

PV: $1,940.95
EV: $2,009.47
AC: $1,375.00

EAC

The current project is 49.92% Complete.

It is currently 29.16% under budget.

If things continue as is, the project could finish between 15.76% under budget and 41.77% under budget.

PV: $1,940.95
AC: $1,375.00
EAC (CPI Method): $2,383.68
EAC (CPIxSPI Method): $2,343.95
EAC (Overrun to Date Method): $3,390.53

$4,025.00
$3,390.53 — Overrun to Date Method
CPI Method / CPIxSPI Method
PV
AC
Budget / Estimate at Completion
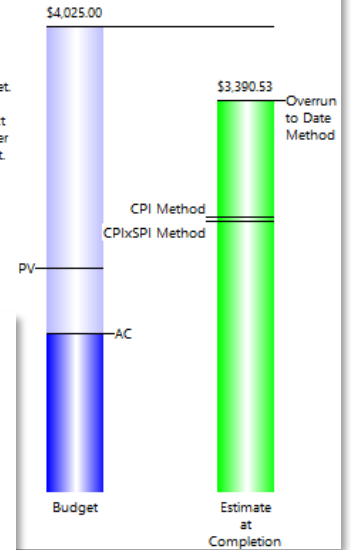
CPI and TCPI

The current project is 49.92% Complete.

Its Cost Performance Index (CPI) is currently 1.46.

To finish the project on budget, the needed CPI for the remainder of the project is called the To-Complete Cost Performance Index (TCPI), which is: 0.76.

If things continue as is, the project most likely will finish under budget.

49.92%
2.00
1.00
0.00
TCPI

SPI

The current project is 49.92% Complete.

Its Schedule Performance Index (SPI) is currently 1.04.

If things continue as is, the project most likely will finish ahead of schedule.
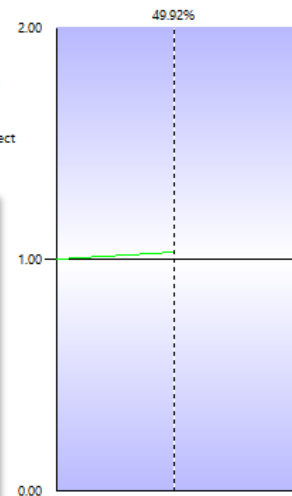
49.92%
2.00
1.00
0.00

CPI

The current project is 49.92% Complete.

Its Cost Performance Index (CPI) is currently 1.46.

If things continue as is, the project most likely will finish under budget.

49.92%
2.00
1.00
0.00

For information on presenting earned value, download KIDASA Software's free e-book Successfully Presenting Earned Value.

# Get more on a single page

There must be something magical about a one-page report because that's what most managers want.

There-in lies the challenge… how can all of that fit into a single page?

In the schedule below
- Many projects are summarized on a single page.
- Only selected milestones display on summary rows.
- Meanings of symbols are defined in the legend.
- Major milestones are marked by symbols with abbreviated text
- Project details can be revealed by "drilling down" to show hidden data. The Red triangle collapse/expand indicators are selected to hide or show the details.
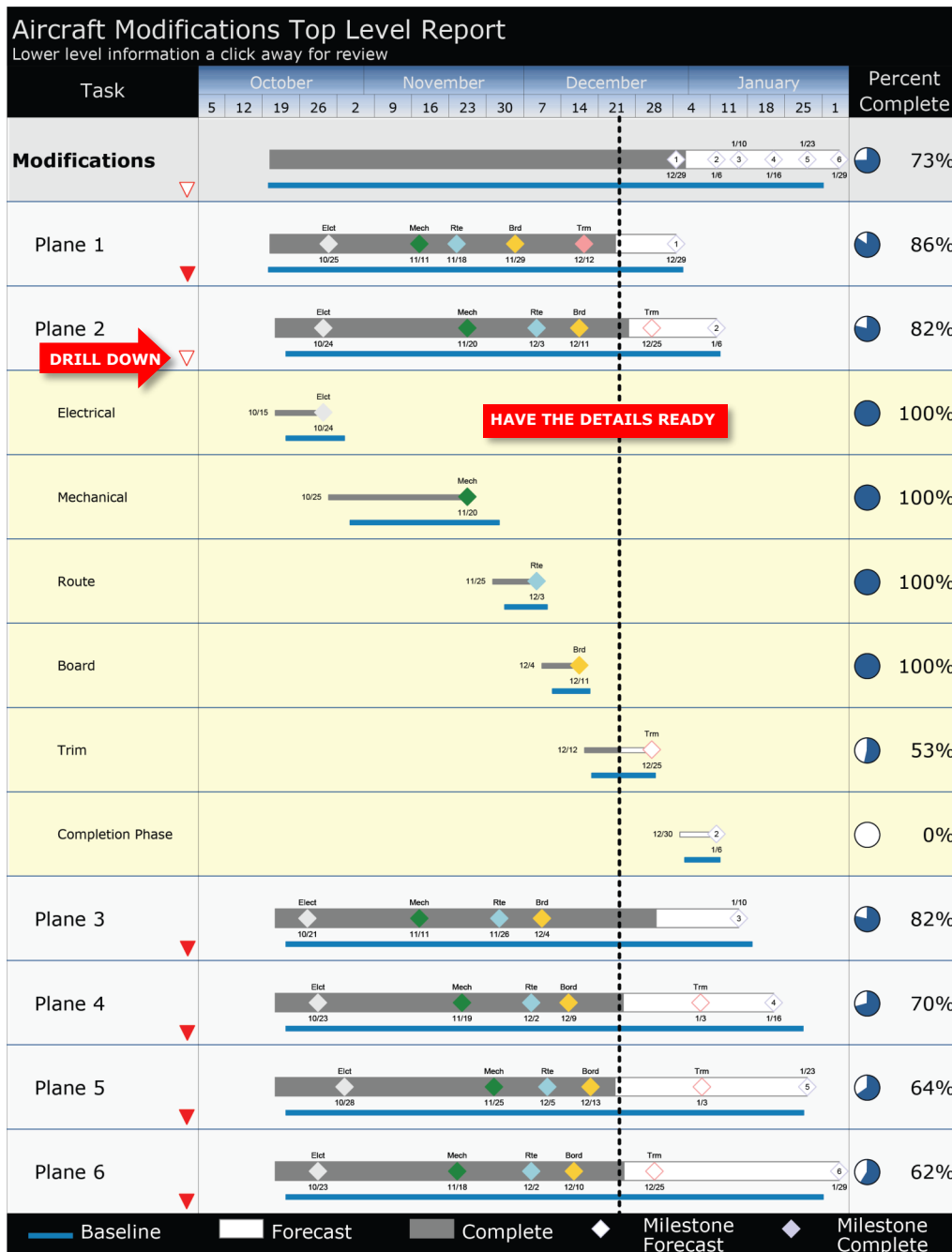
Here are a few tips on meeting a single page challenge:

- Include multiple milestones and task bars per line
- Color-code repetitive tasks, defined in a legend
- Embed detailed information in the milestones or cells
- Before printing, hide unnecessary columns to conserve space
- Abbreviate text, especially using well-known acronyms
- Only display summary activities with key dates
- Use presentation software that lets you "drill-down" to details. That way, your top level schedules can be clean and concise.

Single-page project road map

> *"A picture is worth a thousand words"*

While it might take more than 1000 words to accurately introduce this schedule, some projects require so much attention to detail, that a one page "talking-schedule" is imperative.

What makes this road map example below, an effective reporting format?

♦ High-level events on a single page

♦ Simple, clear symbology for milestones, activities and critical tasks

♦ Calendar expansion and coloring to highlight important date ranges
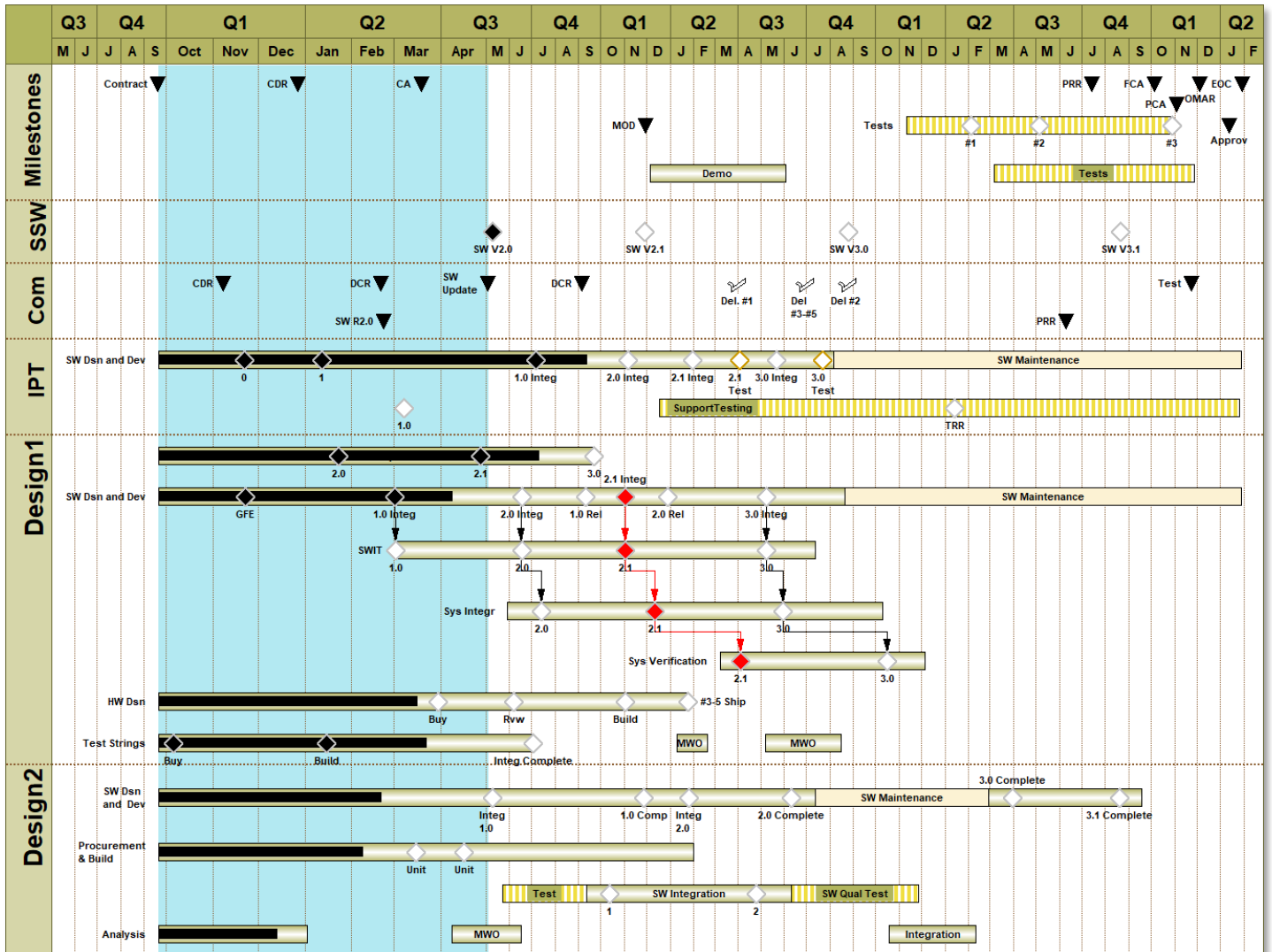
Reporting accuracy: from database to project report

When project information resides in a database, how can you best extract selected data for a top level, "Big Picture" report?

With most reporting tools, you can populate the presentation schedule:
- Manually, by adding dates and entering tasks.
- By importing from a database
- Using a custom program

Of these options, creating a presentation report through a custom automation program offers many key benefits:
- 100% accuracy in the report data
- Time-savings in creating the report
- When project data changes, the report can be instantly re-created
- Report populated with live project data

With a programming language as simple as Visual Basic, you can pull project details from your database and populate a schedule report...all at the push of a button.

NASA uses Milestones software as the reporting output for their International Space Station flight data stored in an Artemis database.

Their custom VB program extracts data to instantly populate the "Big Picture" report for the flight manager.

No more combing through hundreds of data records to manually draw them for a report.

Shuttle Mission Schedule
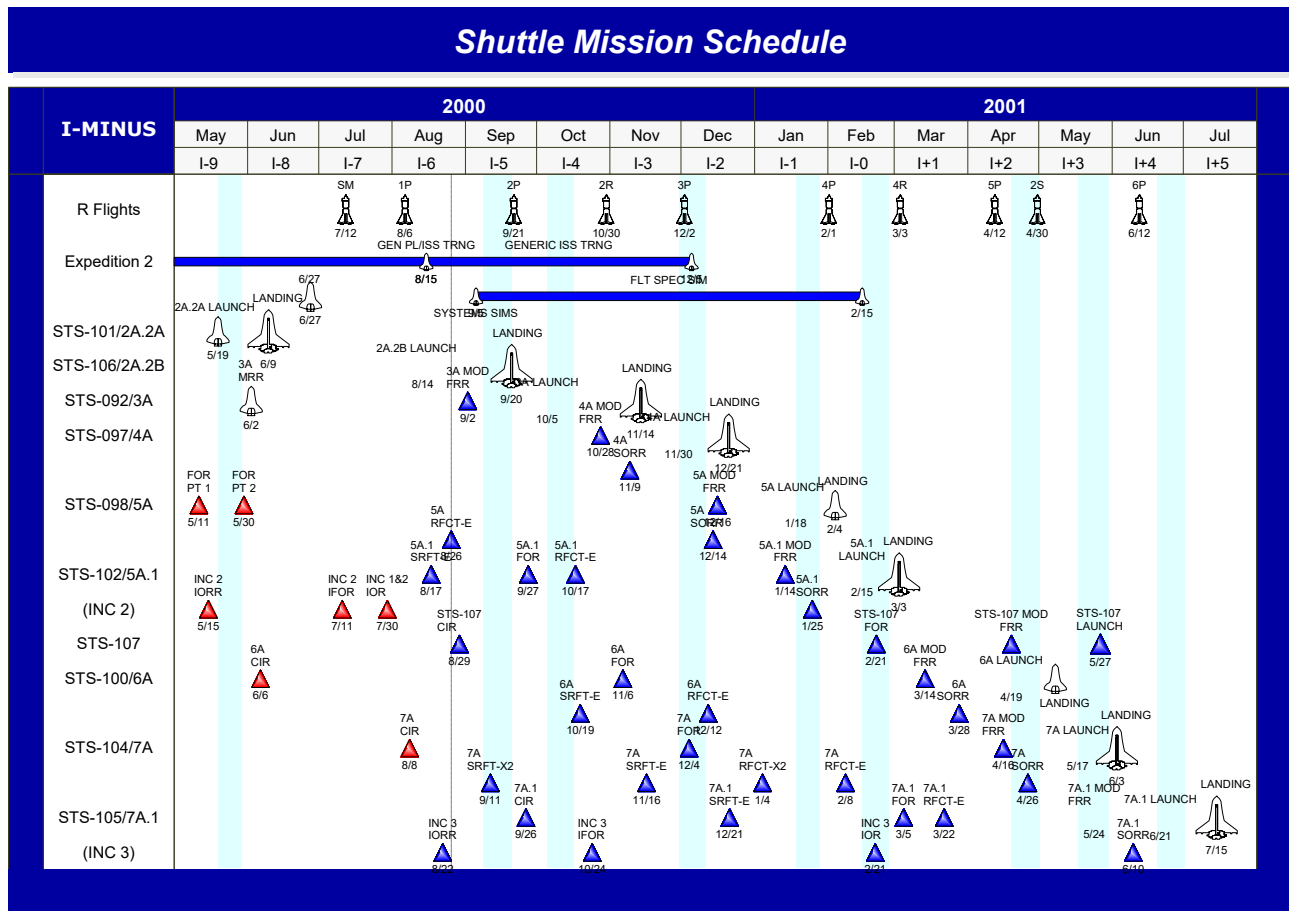
Create Presentation Reports for Microsoft Project

KIDASA Software's Milestones Professional offers a direct interface to Microsoft Project, making it easy to generate presentation report formats beyond the standard formats offered by Microsoft Project. Presentation reports can be kept updated with the latest Project dates using Milestones' "refresh" capability.

In Milestones use the Microsoft Project to Milestones Wizard to generate reports...

- From built in templates
- Let the wizard guide you
- Using coding to generate swimlane reports
- From a custom template
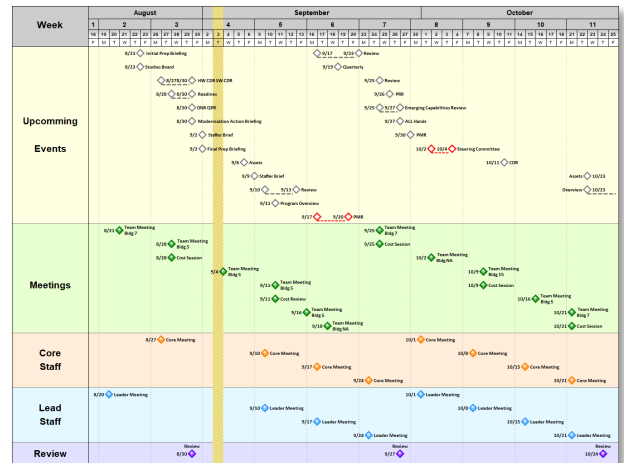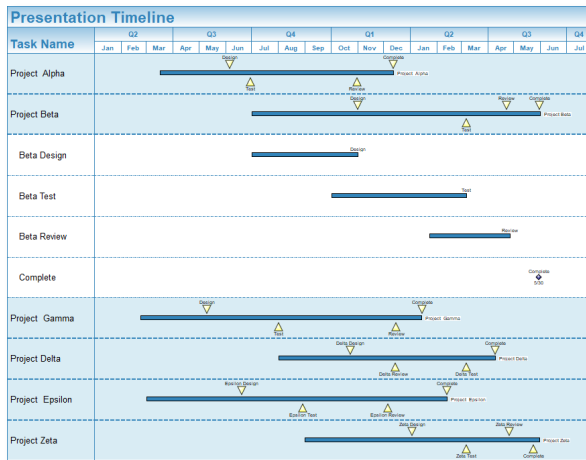
Build Milestones reports for Microsoft Project from one or more Project files.

- Build reports using the Project to Milestones wizard, or build them "ad-hoc" by linking selected tasks from Project.
- Keep schedules up-to-date with Milestones refresh. Refresh from one Project file or from several.
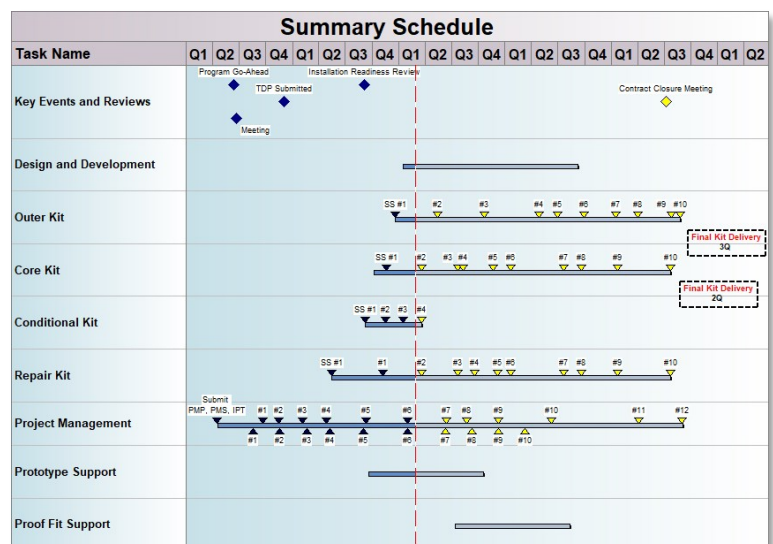
For more on presentation reports for Microsoft Project, download KIDASA Software's free e-book
[Create Presentation Reports for Microsoft Project](#) .

Create Presentation Reports for other Applications

Create Presentation Reports from Primavera data

Transform Primavera schedules into executive level presentation reports with Milestones Professional. Then Refresh the Milestones report when the Primavera information has changed.

Features:

- Primavera information must be saved as an XML:MS Project Schema file
- Update presentation schedules when Primavera dates change with Milestones refresh.
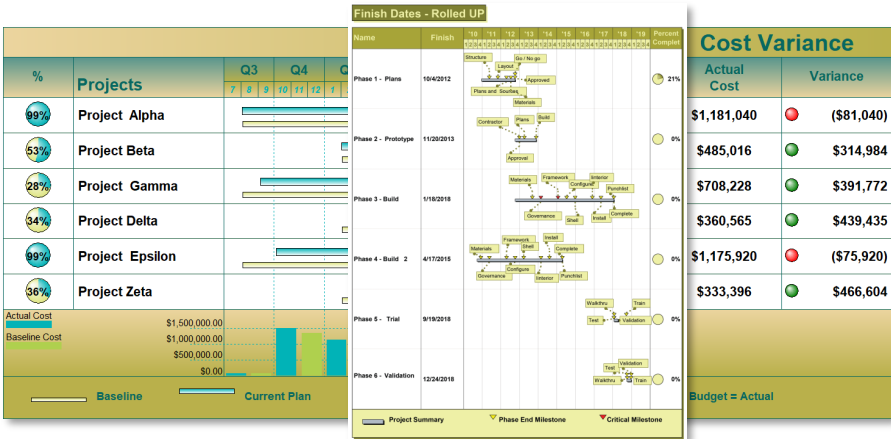
Create Presentation Reports from Excel data

KIDASA Software's Milestones Professional Smart Import feature is designed to generate a Milestones schedule from data of any application, like Excel, that can copy data to the Windows Clipboard. Reports can be updated ("refreshed") when Excel dates change.

Features:

- Use "Smart Import" to bring in Excel fields. By using "Smart" column headings, Milestones knows just what to do!
- "Refresh" schedules from Excel to keep them up to date.
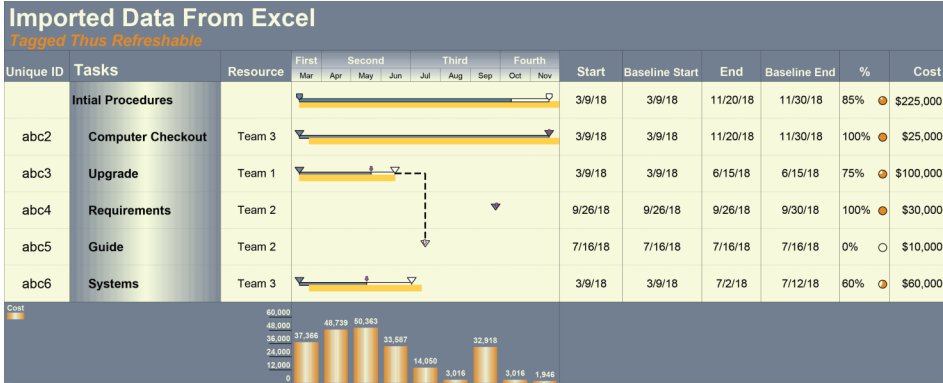
Create Presentation Reports from Outlook tasks and calendar appointments

KIDASA Software's Milestones Professional offers a direct interface to Outlook, making it easy to generate presentation reports.

Features:

- A variety of report templates.
- Customize the reports with available Outlook fields to add as columns.
- Customize the reports with available Outlook fields to add as symbol text or notes.

Milestones Professional software from KIDASA Software
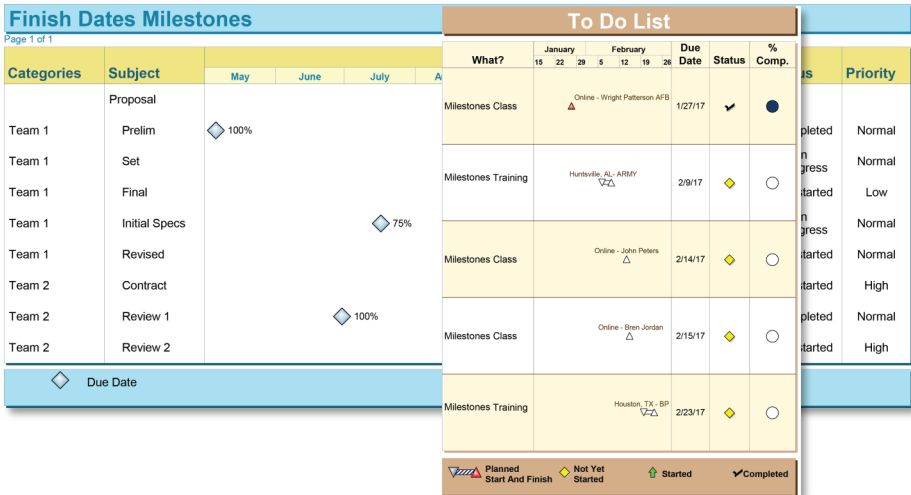
When you manage and schedule projects you need software that is powerful, fast and easy to use; project management software that lets you organize your project, sell your ideas, streamline your work and track results.

- ♦ Presentation reports

- ♦ Combine cost and schedule

- ♦ Manage large projects

- ♦ Create reports for Microsoft Office Project

- ♦ Calculate Earned Value

- ♦ Distribute schedules via print, e-mail, Internet, more!

- ♦ Present schedules interactively using "full screen" mode, complete with drill down. Make changes during your presentation.