

Project teams and stakeholder management

Writing Project Reports

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PMG 341

10th Lecture

Lecture (10)



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Course Outline

Lecture 1: Determining the Direction and Initial Specifications of a Project.

Lecture 2: the search for the high-performing team.

Lecture 3: Context: Laying the Foundation for Team Success.

Lecture 4: Composition: Getting the Right People on the Bus.

Lecture 5: competencies: Developing Team Skills for High Performance.

Lecture 6: Change: Devising More Effective Ways of Working Together.

Lecture 7: The Project Team's Environment (Stakeholders, Developing and Using Project Networks).

Lecture 8: Leading Project Teams.

Lecture 9: Managing Conflict in the Team.

Lecture 10: Writing Project Reports.



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Lecture Outline

1. Know your readers and what they want.
2. The project report.



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Writing Project Reports

Introduction:

- Project reports can differ a great deal from one another in a number of ways.
- They differ in their **purpose**, their **formats**, and **their formality**, to name just a few.
- They include final reports that present the project after completion, progress reports that review how a current project is progressing, and project proposals that seek to get a project funded.
- Even an extended e-mail to a project leader, presenting a problem that has come up and what might be done about it, could be considered a project report of sorts.



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Writing Project Reports

1. Know your readers and what they want:

- Writing specialists, authors, and readers alike make one recommendation to report writers above all others: **Know your readers**—know what they want and how they want it delivered.
- Endless reports have been tossed aside because this simple recommendation was not followed. Although the advice is sound, its implementation is often difficult.
- When we write project reports, we tend to address our own views of the project and what we consider most important.



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- **Generally** speaking, **the readers of a project report** are some of the same stakeholders who have had an interest in the project all along. The time to get to know your readers, then, is not at the end of the project but from its very beginning.
- Project leaders need to communicate with their stakeholders all the way through a project.
- In their conversations, interim reports, and presentations, project leaders need to consider what stakeholders consider most important and how they want information presented to them.



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■ What any reader wants:

Most readers of a project report have some general things they would like writers to keep in mind.

- *Readers want things simple.* They do not have the time or inclination to work at understanding what you are trying to say. Keep sentences simple and vocabulary straightforward; avoid jargon and acronyms that are not familiar to your readers.



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- *Readers want what they want.* They want to jump to things that are of interest and importance to them. You need to make sure you cover what is important to your key readership and help them find it in your report.
- *Readers want what they want quickly.* They want to dig into or skim the material as they see fit. The best-written reports facilitate a quick reading of key ideas and components.



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- *You want your readers to have confidence in your abilities.* Developing your relationship with key stakeholders during the course of the project is the best way to build stakeholder trust.
- How well the report is written, however, is a key element in maintaining that confidence.



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What decision makers want

- One of your most important readers is the decision maker.
- **Decision makers** are those who have the authority to allocate resources to the project and to follow up on any recommendations the report will make.
- Like any other category of reader, decision makers come in all shapes and sizes.
- **There are at least two common characteristics** among them, however, that the writer should keep in mind. **First, decision makers are busy people.**



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- Although your project may be first and foremost in your mind, it is likely only one of many and varied projects and tasks confronting the decision maker.
- **Second, decision makers are paid to make things happen.** As a result, they must translate the information provided in reports into concrete courses of action.
- Authors succeed with decision makers to the extent they help them do this.
- **As a direct result of these two basic characteristics, formal project reports should attend to a number of issues:**

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- **Give background information quickly.** Because the decision maker is confronted with many tasks and projects, you will want to remind him or her quickly about your project.
- **Think and write strategically.** When developing formal reports for decision makers, focus on key strategic issues and information relevant to them.
- **Layer information according to detail.** Generally speaking, decision makers do not like to be hit with a lot of detail all at once.



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- **Avoid technical jargon.** Common phrases and vocabulary for a technical expert can be so much incomprehensible jargon to those outside the technical or specialist area.
- **Write for their level of expertise.** The expertise of decision makers is often different from that of the project writer. Fully explain ideas that may lie outside their area of expertise but don't get bogged down in unnecessary detail.



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■ What expert advisors want:

- Decision makers often make use of expert advisors to review and confirm the quality of a project report's content. Whoever plays the role of expert advisor will likely have expectations of his or her own.
- Expert advisors **often want to have available to them the technical detail behind the report.** They expect thorough explanations that are to the point. They may also like to have available the data used in developing the project's product.



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■ What implementers want

- Many projects are done as a first step where follow-up work is envisioned.
- **Tim and Jennifer's** feasibility study is just one example.
- If Tech Machine executives decide to go ahead with the venture, those who will implement the effort will turn to **Tim and Jennifer's** report for help.
- Implementers will use the information within the report to help carry out some or all of its recommendations or other actions decision makers have chosen to pursue.



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2. The project report:

- Formal project reports tend to have a common structure. That structure is helpful to both **the writer**—who wants to know what to cover—and **the reader**—who knows what to expect.
- **We cover that structure in three basic parts: the front end, the body of the report, and the back end.** The front end of a report covers all material up to the actual body of the report (e.g., the cover page, table of contents, and executive summary).
- Usually developed at the end of the actual writing of the report, the elements of the front end are, nevertheless, extremely important to the report's success.

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- **The body of the report** covers the actual discussion of the project itself. It includes an introduction, major sections and subsections of the report's content, the report's conclusions and recommendations, and the reference section.
- **The back end of the report** includes all the support material for the report in appropriate appendices.



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1. The front end

The **front end of a report** includes its cover page, possibly a letter of transmittal, a table of contents, lists of tables and illustrations, and the executive summary. Each of these begins on a new page.



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- The Cover Page

- The cover page of a project report is straightforward.
- It begins with the title of the report, gives the authors' names and titles (sometimes this is an organization rather than a person or team), provides the date of transmittal, and includes the names of the people or organization receiving the report.



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- The Letter of Transmittal

- The **letter of transmittal** is used to convey the project report to a specific reader, group, or audience.
- It usually follows the normal layout and conventions of a business letter or memo. Opening remarks usually identify the project to the reader.



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- The Table of Contents

- The **table of contents** lists the major sections and subsections of the report along with the page numbers where they can be found.
- The table of contents begins on a separate page with the title of the report at the top followed by the title “Table of Contents.”



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- Lists of Tables and Illustrations

- Project reports also contain **lists of tables and illustrations** that appear in the report.
- These are listed separately from one another, have their own titles (e.g., “List of Tables”), and provide the page numbers where the tables and illustrations can be found.



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- The Executive Summary

- The **executive summary** is one of the most important components of any project report.
- A great deal of attention should be given to it. The label “executive summary” conveys the essence of what is being written and for whom.



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2. The body

- The body of the report begins on a new page with the title of the report at the top.
- It begins with the report's introduction, moves through the major sections and subsections of the report, wraps up with the report's conclusions and recommendations, and ends with the reference section.



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- The Introduction

- The introduction of the report provides at least two key background elements of the project.
- **The first element** is the purpose and objectives of the project and any key information related to them (e.g., for whom the project was done, key constraints).
- The introductory statement given in the executive summary can be duplicated and elaborated a little more here. A good, serviceable start for an introduction is a purpose statement that mirrors the project's mission statement:
- “The purpose of this project was to ...”



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- **The second element** of an introduction is the project's **scope statement**. This would include the project's main objectives and its specific deliverables.
- A general overview of the project scope is enough for the body of the report with any more required detail given in a supporting appendix.



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- Major Sections and Subsections of the Report

- The major sections and subsections of the report follow and, together, form the “macrostructure” of the report.
- **The macrostructure** is the overall organizational structure of the report’s body, which allows it to flow logically from one topic to the next. A well-planned macrostructure allows the reader to easily navigate and understand the main objectives and topics of the report and, therefore, the project itself.



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- The major objectives of the project might be used to structure the **major sections** of the report, and **subsections** might deal with second-level objectives or deliverables.
- In this case, the scope statement given in the introduction can serve as an overview of the report's content. The key here is to “chunk” information in ways that make sense.
- The structure of the project itself can help writers do just that.



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- Conclusions and Recommendations

- **Conclusions and recommendations** wrap up the report and are one of its most important sections.
- After reading the executive summary and, perhaps, giving the body of the report a quick scan, many decision makers turn to this section for extended reading and consideration.



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Conclusions

- summarize the findings and outcomes of the project, not the content of the report itself—a common mistake.
- Now that the project is done, what did you find out or discover? What can you conclude about the project's objectives?
- This section calls on the project leader and team to analyze the project and its objectives and outcomes.



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- **Recommendations** are courses of action that the project team suggests decision makers should take.
- Recall that decision makers are paid to make things happen. Your recommendations, then, should be clear, concrete, and action oriented.
- **Tim and Jennifer**, for example, might recommend a specific location to set up manufacturing operations and specific vendors to fill the company's needs for equipment and material.



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- References

- Most projects most often use some sources of support for their work. Books, journals, articles, and government documents are a few examples. People contacted and websites are others.
- The **reference section** is where these materials are listed.



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- The reference section is usually one of the last sections developed for a project report. By that time, the sources and citations used in a project are often long-gone and forgotten.
- It is important, therefore, to keep a running list of support material as the project moves forward in one centralized location.



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3. The back end: supporting appendices

- The back end of a report contains all the support material of a project report in appropriate appendices .
- Those **appendices** contain detailed information for the final report.
- They include as well material that might have been mandated by the project but is inappropriate or too detailed for inclusion into the body of the report.



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The project may have been required, for example, to conduct certain studies.

The details of those studies might well be included as appendices so expert advisors can review their quality.

Lecture 10**Writing Project Reports****References:**

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Chapter 9