

Status Report for the Period <StartDate> – <EndDate>

This is a status report commonly used by employees or team members. It is a simple format that makes it clear what the team member is working on and easy for the manager to provide coaching, guidance, or redirection if required. The status report may be completed in point form or full sentences depending upon personal style and preference.

The title of the status report should be amended to reflect the time period for the report. The time period may be one week or one month, or whatever makes sense to you in your organization. Shorter more frequent reporting is recommended for less experienced personnel or where the environment is dynamic and frequently changing. Longer reporting periods are recommended for senior personnel or in an environment that is more consistent.

The title of the status report is defined as a document property. Select the file > properties > advanced properties > summary. Update the title text with the correct time period for the report and click "Ok". Then type Ctrl-A and F9 to refresh the appearance of that field throughout the document.

What I planned to do this period:

- The section contains the employee's objectives and goals for the period.
- Each objective should be listed as a unique bullet.
- Identify deliverables to be completed, activities to be performed and meetings to be held.

What I actually did this period:

- The section contains a statement of what was actually accomplished during the period. We all understand that sometimes, things happen and despite good intentions, we are not able to accomplish what we set out to.
- Each accomplishment should be listed as a unique bullet.

What I plan to do next period:

- This section contains a list of what the employee expects to do in the next period.
- Each goal/objective should be listed as a unique bullet.
- Identify deliverables, activities, and meetings to be held.
- This section will be copied and pasted into the "What I planned to do" section of the status report for next period.

Risks/Issues:

- This section contains tips and suggestions from the employee to the manager regarding things that are not going according to plan or tasks/activities that require the management action.
- Identify the risk and describe what is being done to mitigate the risk. Describe additional actions that may be taken.
- Identify the issue and describe what action is being taken to manage the issue and minimize the negative impact of the issue. Describe additional actions that may be taken.
- Don't be afraid to ask for help. While managers want to know that you have tried to handle the risk/issue yourself, there are some items that need to be addressed by managers because they have a different perspective and a different political position within the company.

Notes/Questions of Interest:

- This section contains comments, questions and general information that the employee may want to share with the manager.

Out of Office:

- This section contains a list of known, expected absences.
- The absence may be personal (doctor appointment, meeting with child's teacher, vacation) or professional (meeting with client, training, conference)
- The level of detail in this section may be negotiated between the manager and the employee.
- This section is included to assist with resource planning and minimize surprises.