Projerra

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

This is a status report that may be used by employees or team members working on many objectives simultaneously, where the activities may span multiple weeks. The format is more complex in order to articulate the state of each objective. The intention of the report is to make it clear what the team member is working on and easy for the manager to provide coaching, guidance, or redirection or reprioritization if required. The status report may be completed in point form or full sentences depending upon personal style and preference. Other elements of the report may be customized to suit your requirements.

The title of the status report is should be amended to reflect the time period for the report. It 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 if 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.

Plans & Priorities

This Period	Next Period	Future
This section contains an enumerated list of the objectives and activities for the current period. The list should be sorted with the most important priority at the top and least important priority at the bottom. The list is a high level summary of the objectives. Details will appear in the table entitled "Activities by Deliverable".	This section contains an enumerated list of the objectives and activities for the next period. The list should be sorted with the most important priority at the top and least important priority at the bottom. The list is a high level summary of the objectives. Meetings are not listed in this section. Meetings planned for the period will appear in the table that follows This section will be copied and pasted into the "This Period" column for the next period report.	This section contains an enumerated list of the objectives and activities for the foreseeable future. This objectives in this list may be 1-3 months in the future or longer depending upon the horizon of the business.

Meetings Planned for Next Period	
Monday	- List the meetings that will take place every day. If desired, list the location and attendees at the meeting. - Each meeting should appear as a separate bullet. - If there are no meetings scheduled that day, leave the day reference in the left most column, but delete the text from the right most column so as to illustrate that there are no meetings planned that day.
Tuesday	
Wednesday	
Thursday	
Friday	

Activities and Accomplishments by Deliverable

This section describes the major deliverables and the activities or accomplishments for the period. This section captures the details of what was done this period and what needs to be done over the coming periods.

Deliverable	Activities this Period	Next Steps	Status
Each objective or deliverable has a separate row in the table.	- Articulate the actual activities and accomplishments that were performed this period. - Identify any meetings that took place related to this deliverable	- Describe the next activities and meetings that are required. - The activities identified here may happen in the next period or several periods. - This is a great place to document next steps for tasks that need to be put on hold for some period due to other priorities so that next steps do not get forgotten.	This column is used to describe the current state of the activity. Use colors to help make it easy to identify tasks at risk. Feel free to add states or customize the colors. Please update the legend below to reflect the states and colors applied by your organization.

Legend

Not Started	Active	On Hold	Done	At Risk	Dropped

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.