

Are Traditional Reports past their use-by date?



Projects create reports, in fact research by Dr Jon Whitty in *Advising Upwards*¹ suggests Gantt Charts and reports are part of the rituals expected of ‘proper’ project managers! Most projects are required to produce weekly and/or monthly reports for their client as part of a contract, or as part of an internal set of reporting requirements, or both. The problems are:

1. The information is always out of date – project reports largely focus on what has happened; the information in a typical monthly report is between 7 weeks and 3 weeks (average 5 weeks) out of date by the time it is issued
2. Most reporting regimes use a ‘one-size-fits-all’ structure, this is better than free-form reporting but means while all of the information may be needed by someone, there’s a lot of redundant information for almost everyone
3. Reports are time consuming and expensive to produce
4. The information is groomed and edited to suit the ‘story’ the report writer would like to tell; you do not need to be dishonest to change the impression a report creates, you simply need to understand how language works, and
5. The busy people who really need the information are usually too busy to read the report!

What can replace traditional reports?

Developments in Business Intelligence, Artificial Intelligence, and system integration, can offer a useful solution by putting real-time information in front of the people who really need to know in ‘real-time’! Most of the information on virtually every project (even traditional construction projects) is recorded in various computer software tools ranging from word processors through spreadsheets, to timesheet and invoicing systems, to specific tools such as Jira.

These project records are data, and with a little bit of organization the data can be brought into a Business Intelligence (BI) system in real-time. The results from a well-designed BI system are a dashboard showing what is occurring today, usually with a drill-down capability to see what has changed and why.

The problem with BI systems designed for normal businesses are potentially:

- Too much information leading to confusion
- The rate of change in many projects as the work passes through significantly different phases, and
- ‘Noise’ caused by different elements within the tool being updated, edited, and corrected at different times generating ‘false’ differences for short periods of time.

¹ For more on *Advising Upwards: A Framework for Understanding and Engaging Senior Management Stakeholders*, (Gower Publishing Ltd) see: <https://mosaicprojects.com.au/shop-advising-upwards.php>

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Artificial Intelligence (AI) can solve some of these issues by:

1. Within the BI system by filtering out the noise. For example, if Bill's timesheet has been entered but his work for the day has not been updated, wait until the end of Bill's shift before flagging 'low productivity' – his work update may be entered in the next 5 minutes (real-time is good but the information needs managing and synchronizing).
2. Applying rules to change display scales and how issues are 'flagged' depending on the size of the project and the phase of it work.
3. Outside of the system learning what is important to whom. No one can spend all day looking at the dashboard. AI can be trained to send targeted alerts when something relevant to a manager changes enough to warrant her attention. An email or a SMS is sent with a link embedded to the relevant part of the dashboard.

The challenge of Dashboards

Dashboards have been described as *"visual display[s] of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance"*². But:

- Who decides what is 'most important' and what to leave off the display? Too much data can hide and confuse; the wrong type of display can hide issues³

² Quote: Stephen Few, a renowned visualization scholar.

³ Graphical displays can hide and distort information:
<https://mosaicprojects.wordpress.com/2014/08/15/mind-your-language/>

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- What objectives really matter? There is a lot of research that suggests soft skills and people issues underpin performance, which drives time and cost outcomes; displaying a symptom such as a cost variance without information on the root cause of the issue can be misleading

Communicating project information to management can be difficult at the best of times⁴, will dashboards really help improve the situation? Ignoring the value of real-time information will be counterproductive, integrated systems such as BIM in the construction industry are already in use, as are collaboration tools in software projects. So, the question becomes how do we evolve the practice of project management, project controls and governance oversight to make use of these opportunities and where should the responsibility for developing and implementing these emerging technologies lay? My feeling is the natural home for these technologies is the PMO; but the work involved in phasing out traditional reports and developing dashboard systems that are elegant, effective and easy to understand will require new skills and capabilities; are PMOs up to the challenge?

Do reports still have a role?

My suggestion is yes, but it is a different role. Reports are needed to explain something or to show the results of an investigation or enquiry. For example, a team (or individual) may be tasked to report on the preferred subcontractor to engage for a particular role on a project. The report provides the decision makers with the information and options needed to make a decision. In fact, this would be a far better use of the time currently spent by PMO and project staff preparing and distributing weekly and monthly reports.

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⁴ For more on the **challenges of effective communication** see:
<https://mosaicprojects.com.au/PMKI-PBK-040.php#Process2>

