



Project Reports and the PMBOK

One of the less well understood parts of the *PMBOK® Guide 5th Edition* has been the significant refinement in the way project data is transformed into useful project reports; mainly due to the distributed information. This short article will map the flow.

The starting point is *Chapter 3.8 - Project Information*:

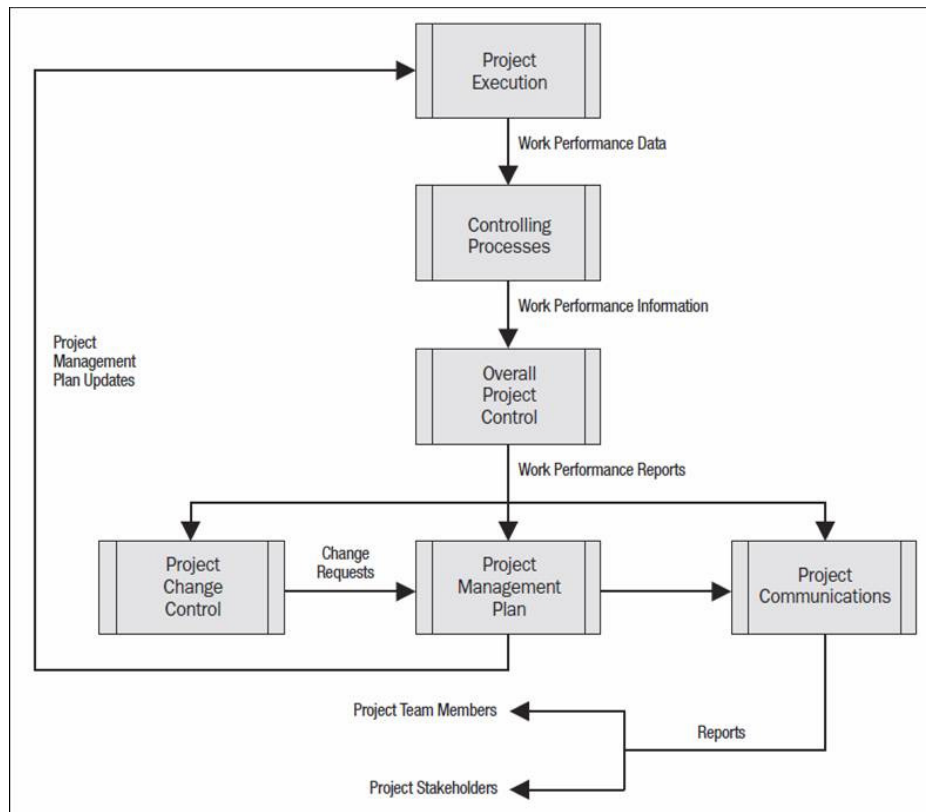


Figure 3-5. Project Data, Information and Report Flow
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This section recognises information changes in character as it is processed:

- Work performance **data** is the raw observations and measurements made during the execution of the project work. Data has little direct value.
- Work performance **information** is created when the data is analyzed and assessed. The information used to help control the work is derived from the analysis in context of the work performance data. This information also forms the basis of project reports.
- Work performance **reports** are the physical or electronic representation of work performance information compiled in project documents and used for project decision making.
- Work performance **reports** are also distributed or made available through the project communication processes with the intention of influencing and informing the actions of stakeholders (both internal and external).





This overall flow is defined in more detail in each of the PMBOK's knowledge areas.

The actual 'work' of the project is defined in process 4.3 Direct and Manage Project Work (and a limited number of other processes). These 'work' focused processes all have 'work performance data' as an output.

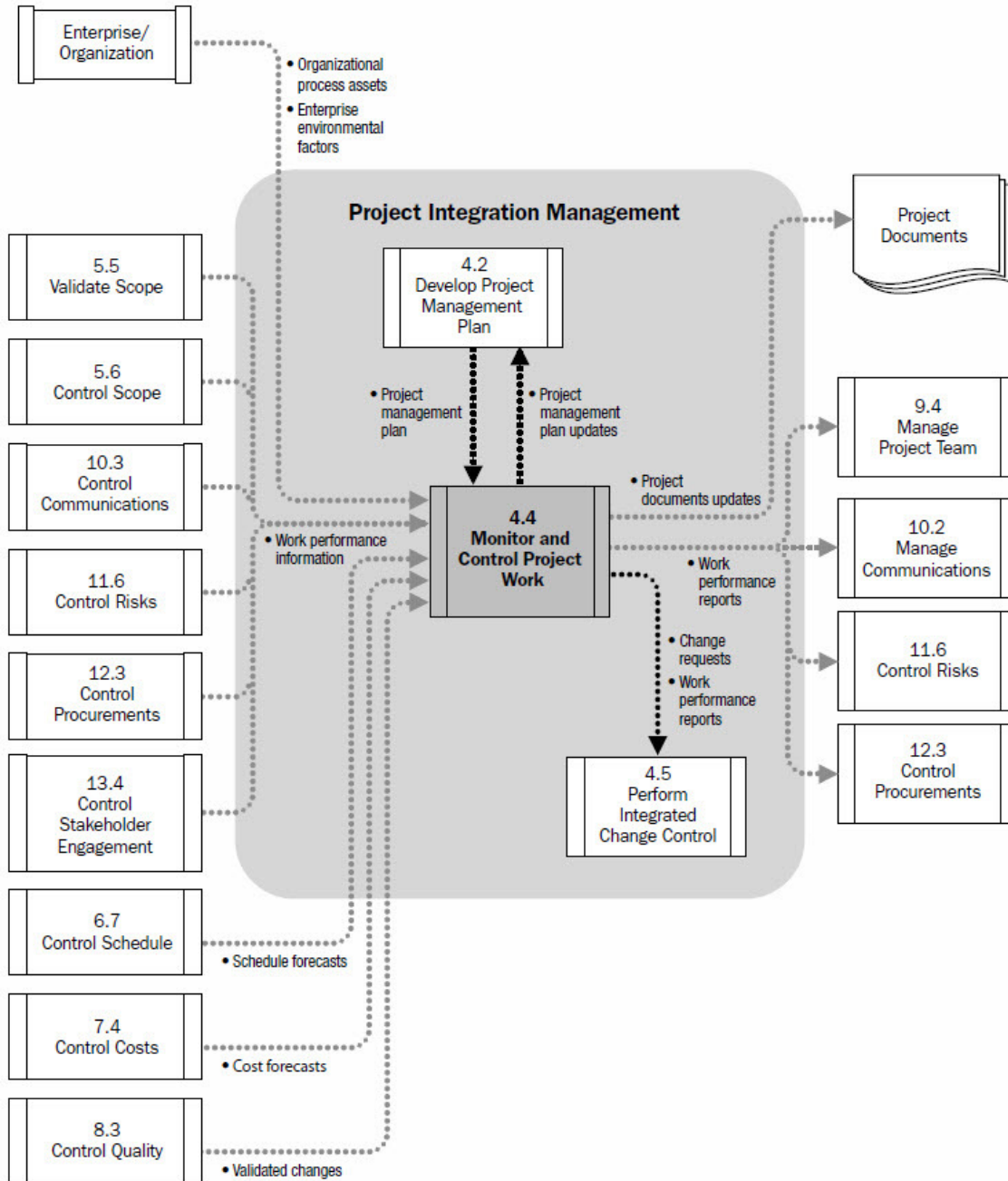


Figure 4-9. Monitor and Control Project Work Data Flow Diagram © 2013 Project Management Institute

Assessing and analysing the data is part of the controlling process in each of the specialist knowledge areas from 'scope' to 'stakeholders'. For example, process 13.4 Control Stakeholder Engagement has





work performance data as an input and *work performance information* as an output (as do all of the other controlling processes).

These nine sets of specific *work performance information* pertaining to scope, time, cost, etc., are brought together in process **4.4 Monitor and Control Project Work**, to produce *work performance reports* as an output. The consolidated information in these *reports* has a number of uses:

- The information is of course used for internal project management purposes.
- It also forms a key element of the project's stakeholder communication (see below).
- Another key element within this process is knowledge management, the gathering and using of lessons learned within the project and the wider organisation; this aspect is discussed in our White Paper: *Lessons Learned*¹.
- Providing an audit trail of the project's progress for archiving in the organisation's 'process assets'.

Process **10.2 Manage Communications** receives the work performance reports as an input, and uses communication technology, models and methods to create, disseminate, store and ultimately dispose of performance reports and other project communications developed from the information contained in the *reports*. The art of effective communication is getting the right information to the right stakeholder, in the right format at the right time! For more on this see: *The three types of stakeholder communication*².

Conclusion



***Data is not information,
information is not knowledge,
knowledge is not understanding,
understanding is not wisdom.***

Clifford Stoll

Overall, the *PMBOK® Guide* 5th Edition has got the flow from raw data to useful reports (processed information) fairly well defined; the only challenge is knowing where to look! Hopefully the 6th Edition will do a better job of 'joining up the dots'.

The subsequent challenge of gaining insight and knowledge through understanding the structured information contained in the reports and then using that understanding to make wise decisions is down to you!

The progress to *wisdom* is helped by concise analysis and effective report design, but also depends on the attitude and aptitude of the person receiving the information. Whilst various aspects of analysis are discussed, the key communication skills of information presentation and document design³ are largely missing from this version of the *PMBOK® Guide*.

¹ WP 1004 **Lessons Learned**: http://www.mosaicprojects.com.au/WhitePapers/WP1004_Lessons_Learned.pdf

² **Three types of stakeholder communication**:
http://www.mosaicprojects.com.au/Mag_Articles/SA1020_Three_types_stakeholder_communication.pdf

³ For more on **document design** see: http://www.mosaicprojects.com.au/WhitePapers/WP1065_Page_Layout.pdf



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