

WBS 5.4 Deliverable: Reporting Scope, Cost and Schedule
To Stakeholders

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Introduction

The scope, cost and schedule of a project make up a triad of information that needs to be reported to stakeholders in different ways. A stakeholder's need for report can be broken down by the level of contribution, importance and commitment to the project. Each category of stakeholder requires a different level of information and urgency for the report. Much of the data used in this process comes from the stakeholder analysis. A simple way to rapidly visualize the information is to plot the data into charts and tables. There are so many variables in the information needs or requirements it would be impossible to develop a set standard. But here are some ideas.

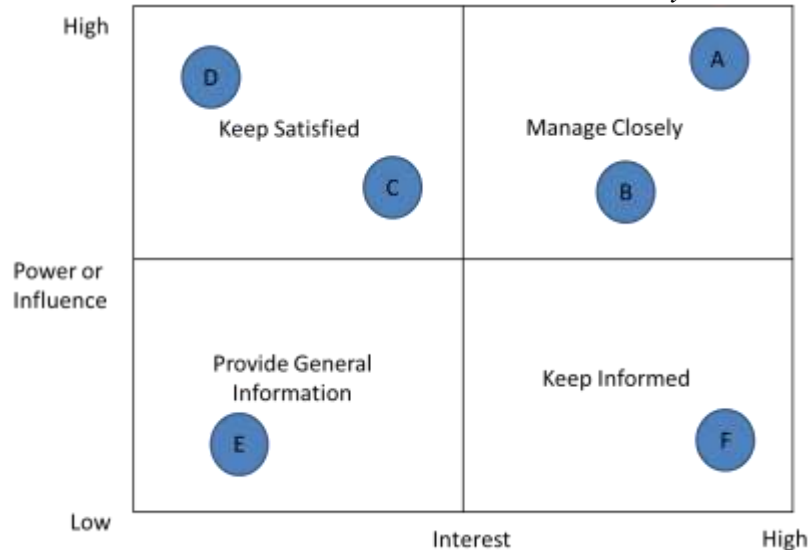
Information Needed.

During the stakeholder analysis the Project Manager (PM) must ask questions to find out what information and report each stakeholder needs. For example construction contractors need to know when the site is available for their specific tasks to start whether there is a delay or the previous task finished early. Top corporate manager need only to know if the project is on schedule and if not how much will the delay cost. With regards to costs, corporate leadership will need to know changes to evaluate the profit margins but as long as we are within the budgeted amount the customer may not need that report. Of course that depends on the customer. When deal with to project scope minor changes which may not affect the cost or only slightly may not be require a report of top management, but will need to be reported to the contractor responsible for the change.

The timing of a report will also need to be determined. Most often this is done by evaluating the impact a stake holder has on the project. The more influence they have the more timely the report needs to be. This doesn't establish how often the report is sent but the

criticality of the notification. In Larson and Grays textbook Project Management The Managerial Process we find the following table to establish the priority of communication:

Table 1 Stakeholder Communications Priority



Example taken from (Larson & Gray, 2013, p120)

Noting that stakeholder A is highly interested and has high influence over the project their communications will be a priority over stake holder E or F. Similar tables can be developed to identify what types of information and how often it needs to be reported.

The next table covers the major part of the communication plan deliverables that deal with scope, schedule and cost both directly and indirectly, to whom and how often they will need to be communicated the preferred delivery method and who will initiate the report. This example is for scheduled reports from previous Project I was a party to.

Table2 Communications Plan

Deliverable	Audience	Frequency	Method	Provider
Milestone reports	Project Manager, Customer	Bi-monthly	Email and hardcopy	Project Team
Project status reports	Customer	Weekly	Email and hardcopy	Project Manager
General Contractor	Project Manager, Project Team	Bi-weekly	Email	General Contractor Lead

status reports				
Subcontractor status reports	Project Manager, Project Team, General Contractor Lead	Bi-weekly	Email	Sub-contractor Lead
Issues reports	Project Team	Weekly	Email	Sub- / General-Contractor Lead
Escalation reports	Project Manager	As applicable	In-person and hardcopy	Project Team
Approved change requests	Homeowner	As applicable	Email and hardcopy	Project Manager
Change requests	Project Manager	Weekly	Email and hardcopy	Project Team

(Hoover, Rodgers, Salter, Stempfley, Strack & Wichner, 2014, p10)




The previous information gives an example of scheduled reports; at time unscheduled events happen knowing when to report on these events can be just as critical. There is a tool called the Project Priority Matrix that can allow a PM to know if they need to communicate changes immediately or if they can wait until the next scheduled report. This tool identifies the priority for each of the three components and based on the stakeholders priority. The matrix can be accomplished for individual stakeholders or as part of the agreed upon communication plan. Using the table from Larson and Gray I will first define the qualifiers.

Constrain: The original parameter is fixed. The project must meet the completion date, specifications and scope of the project, or budget.

Enhance: Given the scope of the project, which criterion should be optimized? This means to take advantage of opportunities to reduce cost, enhance performance through scope or shorten the schedule.

Accept: the criterion is tolerable to not meet the original parameters as long as the other areas are unaffected. (Larson & Gray, 2013, p106)

Table 3 Project Matrix

	Time (Schedule)	Performance (Scope)	Cost
Constrain			
Enhance			
Accept			

(Larson & Gray, 2013, p107)

Using this matrix if something affects any part of the scope, schedule or cost the PM can determine the urgency of the communication to the stakeholder based on their priority.

Conclusion

The importance of reporting to stakeholders and meeting their needs can be understood by understanding the priority the stakeholder places on the type of information and the impact it has on the project. According to the Project Management Communications Bible reports for the Scope, Schedule and Cost are developed by the Project Team and contingent on the needs of the stakeholders. (2013, p 41, 146 &199) The creation of a Role Report as found on page 39 is one more tool that can be used.

References

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