Project Status Report

Designing an Electronic Performance Support System (EPSS)

for

WidgetMart

2345 London Avenue

London, NJ 00001

April 20, 2013

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**Project Status Report**

**WidgetMart EPSS**

**As of 10/1/2013**

**Project Status Summary**  **Percent Complete: 30%**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Scope | Schedule | Cost | Risks | Quality |

This section provides an executive overview of the status for the WidgetMart EPSS project. The percent complete indicates the status for the entire project. The color-coded table above indicates that Scope, Cost, and Quality are on target. Schedule is within acceptable variance of +/- 5% and at this point does not pose a threat to the target completion date of the project. The red indicates the risk level if schedule slips. The schedule is 3% behind due to learning curve for the team, particularly in the training design, development, and delivery of Phase 1. The in-house team members do not have formal instructional design experience and we have had to bring in a consultant to assist in both the design and the training process. Additionally, team members had to be cross-trained in the different areas of the project activities, in case back-up personnel is needed. Our mitigation plan is for the team to make up any loss time by working extended hours over the next three weeks. We anticipate the schedule to be on track for the remaining phases of the project. Note that the schedule, as of now is only impacting the training design, development, and delivery of Phase 1. The system’s design activities (specs, coding) are actually ahead of schedule.

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# Work Planned For This Month (October, 2013)

* Complete Training Development for Phase 1
* Deliver Training for Phase 1
* Design & Develop Training for Phase 2
* Complete system design for Phase 1 and go in production
* Install and Test system Phase 2

# Open (potential) Risk

One of the constraints identified in the project scope is the shortage of translation experts. This constraint may soon become a risk. Currently the team has only one person who is an expert on the language, custom, governmental regulations of each country in which the WidgetMart stores operate. Relying on one individual for this task is risky as it may affect the schedule. The project manager has requested for at least one more translation expert and is awaiting a response. Noted on the issues list table above.

# Open Issues

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Issue | Owner | Issue Date | Expected Resolution Date | Current Status |
| Additional translation expert proposed. | Davey Jones | 7/30/2013 | 8/30/2013 | In review by client and country representatives |
| Level of interactivity in the training design | Josie Roberts | 8/25/2013 | 9/15/2013 | In progress |
| Type of evaluation to be used for training | Deanna Troi | 8/25/2013 | 9/10/2013 | Under analysis |
| Developing test cases for the Testing phase – what data to use | Elim Garak | 9/1/2013 | 9/5/2013 | Under analysis |

# Open Change Requests

A request for developing a prototype of the new EPSS has been submitted by the client. If approved, this scope change will have a significant impact on the project’s schedule and cost. The project team is currently reviewing the request and determining feasibility.

|  |  |  |  |
| --- | --- | --- | --- |
| Change Request Name | Change Request Number | Request Date | Current Status |
| Develop a prototype at Phase 5 prior to integration of Phases 1 through 4. | CR1100 | 9/05/2013 | In Review by project manager and the project team. |

# Project Monitoring Matrix

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Milestone (Task) Name | WBS | Planned Start Date | Actual Start Date | Planned Finish Date | Actual  Finish Date | Revised Finish Date | Status | Comments |
| Evaluation & Recommendations |  | 5/1/13 | 5/1/13 | 5/14/13 | 5/14/13 |  | Completed |  |
| Develop SOW |  | 5/15/13 | 5/15/13 | 5/16/13 | 5/16/13 |  | Completed |  |
| Review SOW |  | 5/17/13 | 5/17/13 | 5/20/13 | 5/20/13 |  | Completed |  |
| Adjust SOW |  | 5/21/13 | 5/21/13 | 5/22/13 | 5/22/13 |  | Completed |  |
| Approve SOW |  | 5/23/13 | 5/23/13 | 5/23/13 | 5/23/13 |  | Completed |  |
| Create Scope Statement |  | 5/24/13 | 5/24/13 | 5/27/13 | 5/27/13 |  | Completed |  |
| Determine Project Team |  | 5/28/13 | 5/28/13 | 5/31/13 | 5/31/13 |  | Completed |  |
| Project Team Kick-off Meeting |  | 6/3/13 | 6/3/13 | 6/3/13 | 6/3/13 |  | Completed |  |
| Prepare Project Plan |  | 6/4/13 | 6/4/13 | 6/17/13 | 6/17/13 |  | Completed |  |
| Review Project Plan |  | 6/18/13 | 6/18/13 | 6/21/13 | 6/21/13 |  | Completed |  |
| Approve Project Plan |  | 6/25/13 | 6/25/13 | 6/25/13 | 6/25/13 |  | Completed |  |
| Contractors Procured |  | 6/26/13 | 6/26/13 | 7/2/13 | 7/2/13 |  | Completed |  |
| Project Kick-Off Meeting |  | 7/3/13 | 7/3/13 | 7/3/13 | 7/3/13 |  | Completed |  |
| Document User Requirements |  | 7/4/13 | 7/4/13 | 7/17/13 | 7/17/13 |  | Completed |  |
| Review Requirements |  | 7/18/13 | 7/18/13 | 7/24/23 | 7/24/13 |  | Completed |  |
| Approve Requirements |  | 7/25/13 | 7/25/13 | 7/26/13 | 7/26/13 |  | Complete |  |
| Identify & Discard Obsolete Data |  | 7/29/13 | 7/29/13 | 8/09/13 | 8/09/13 |  | Completed |  |
| Identify Data for Conversion |  | 8/12/13 | 8/12/13 | 8/16/13 | 8/14/13 |  | Completed |  |
| Categorize Data for Conversion |  | 8/19/13 | 8/15/13 | 8/23/13 | 8/23/13 |  | Completed |  |
| Prepare Spec - 1 |  | 8/26/13 | 8/26/13 | 9/06/13 | 9/06/13 |  | Completed |  |
| Code - 1 |  | 9/9/13 | 9/9/13 | 9/20/13 | 9/20/13 |  | Completed |  |
| Develop Training – Phase 1 |  | 9/9/13 | 9/14/13 | 10/9/13 |  | 10/16/13 | Behind schedule | Extended work hours authorized. |
| Prepare Spec - 2 |  | 9/23/13 | 9/23/13 | 10/3/13 | 10/1/13 |  | Completed | ahead of schedule |
| Code - 2 |  | 10/4/13 | 10/2/13 | 10/16/13 |  | 10/14/13 | In progress | Expected to be ahead of schedule |

# Project Metrics

|  |  |  |
| --- | --- | --- |
| Measure | Numbers | Percentage |
| Tasks Complete | [23 of 76] | [30%] |
| Tasks in Progress | [8 of 76] | [10.5%] |
| Tasks not Started | [45 of 76] | [59%] |
| Time spent | [21 of 39 weeks] | [53%] |
| Time remaining | [18 of 39 weeks] | [46%] |

**Note:**

It may seem from the Metrics that there are less weeks to complete more tasks than are already completed. However, the tasks completed were expected to take longer due to learning curve, and as we progress through the project, the remaining tasks are repetitive and will not take as long to complete.

Rationale Statement

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**Case # 25 – Designing an Electronic Performance Support System for WidgetMart**

**(Ertmer & Quinn, 2007)**

The project status report is a component of the larger Communications Plan of the project. The project status report “reviews what has happened during a performance period, describes problems and the corrective actions needed, and previews what is planned for the next period.” (Portny, Mantel, Meredith, Shafer, Sutton, & Kramer, 2008, p. 361). This project status report provides the WidgetMart EPSS project progress at about the mid-way point of the planned completion date. The first part of the report provides a brief “executive overview” of the project including what is planned for the upcoming month. A color-coded table indicates the components of the project that are on target and those that require close monitoring. The remaining sections detail the activities completed, activities in progress, and those not started. Additionally, open issues, change requests, as well as potential risk items are noted.

This status report has been extracted from the more detailed WidgetMart EPSS project progress report, and is specifically prepared for the clients and sponsor of the project. Depending on the audience, the level of detail for the project status report will vary. This approach as discussed in (Portny, Mantel, Meredith, Shafer, Sutton, & Kramer, 2008) will ensure “consistency among the reports and reduces the likelihood of performing the same work more than once.” (p. 362).

The “executive overview” level project status report for WidgetMart EPSS will be produced every two weeks. However, separate project progress reports and/or meetings will be conducted with the project team as needed.

**References**

Ertmer, P. A. & Quinn, J. (2007). *The ID CaseBook. Case Studies in Instructional Design.*

Upper Saddle River, NJ: Pearson Education, Inc.

Portny, S. E., Mantel, S. J., Meredith, J. R., Shafer, S. M., Sutton, M. M., & Kramer, B.

E. (2008). (pp. 361, 362). *Project Management: Planning, scheduling, and controlling projects*. Hoboken, NJ: John Wiley & Sons, Inc.

Note: Project Status Report template is courtesy of [www.ProjectManagementDocs.com](http://www.ProjectManagementDocs.com), free project management templates, and has been modified to fit the WidgetMart EPSS project.