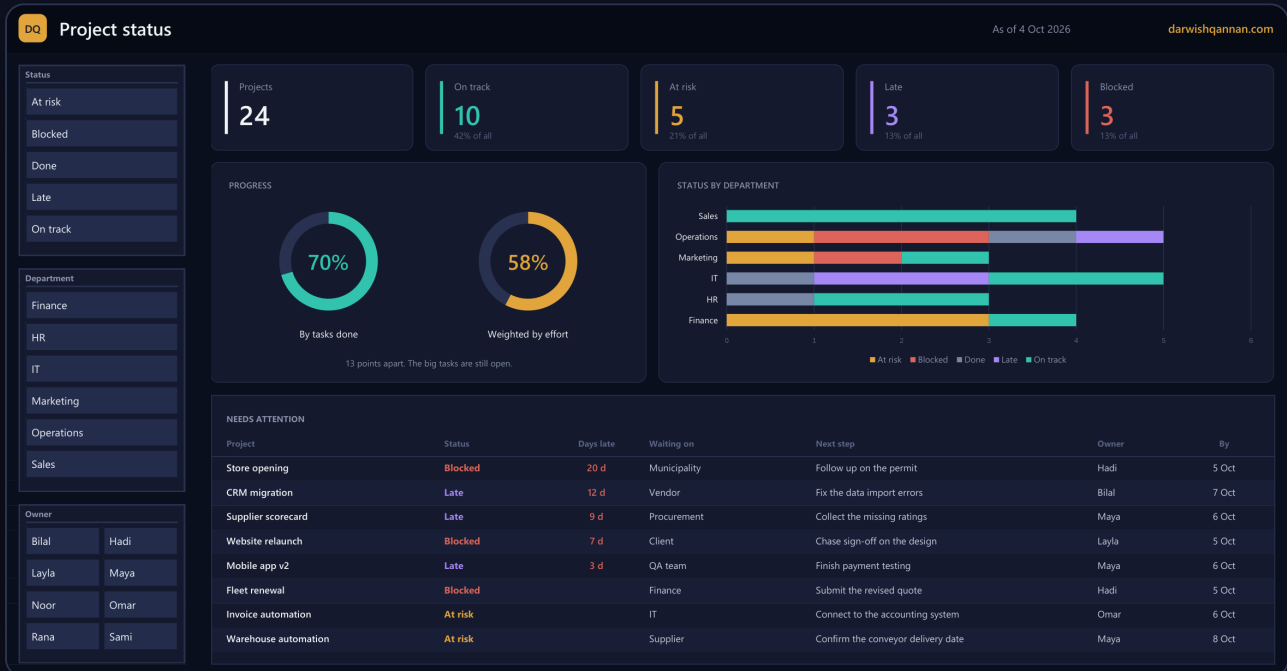


A SHORT GUIDE

The status report people believe.

How to show where your projects really are, with a free Excel template.



A simple way to follow your projects.

This is a small example of how to follow projects quickly, without a complicated system.

It comes with an Excel file. You type your projects into one sheet, and a dashboard shows where each one stands.

It does not replace a full project management tool, and it is not meant to. It is for teams that track their work in a spreadsheet and want a clearer picture every week.

The ideas behind it are few: count the work and not only the tasks, let rules decide the status, and always write down who has the next step.

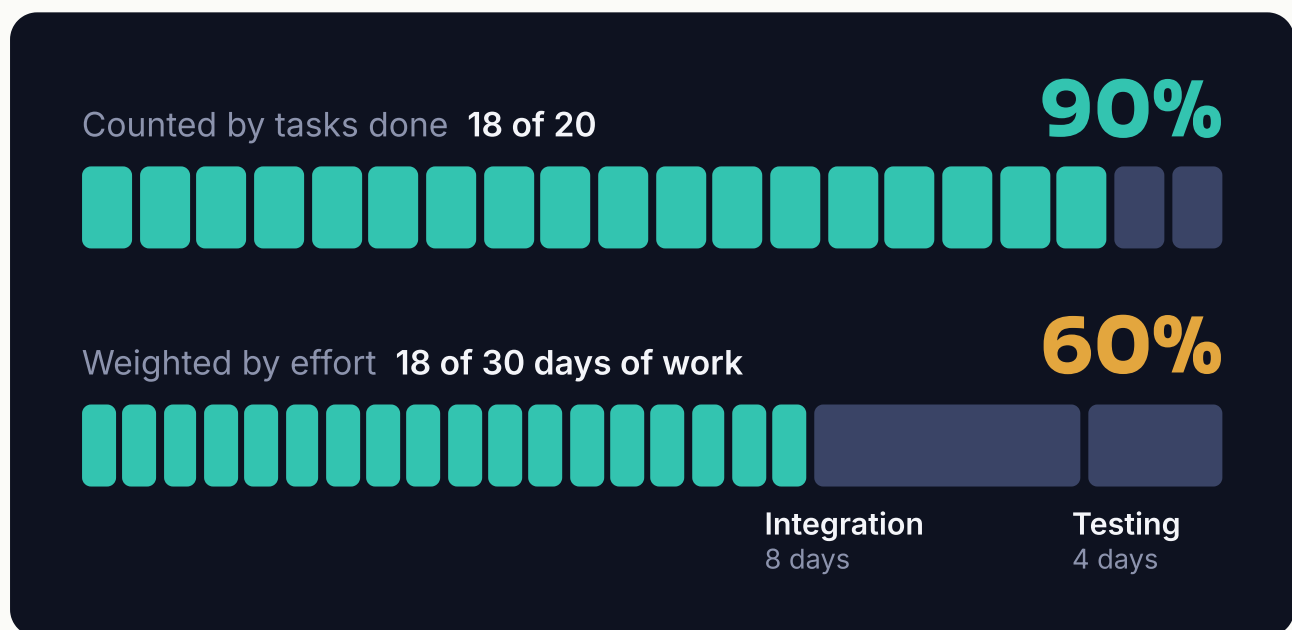
What you get

- An Excel template with a dashboard that updates from your list
- Five status rules that are easy to explain
- A way to run the weekly meeting from one screen

Counting tasks hides the work that is left.

Most trackers measure progress by counting finished tasks. That works only when tasks are the same size, and they never are.

Take a project with 20 tasks. 18 are done, so the tracker says 90%. But the two that are left are the integration and the testing, and together they are 12 of the 30 days of work.



Weighted by effort, the same project is at 60%. That gives a truer picture of how much work is left.

You do not need a perfect estimate. A rough size for each task is enough to stop the last 10% from surprising you. The finish date still depends on the schedule, on what each task is waiting for, and on who is available.

Nobody should type a colour.

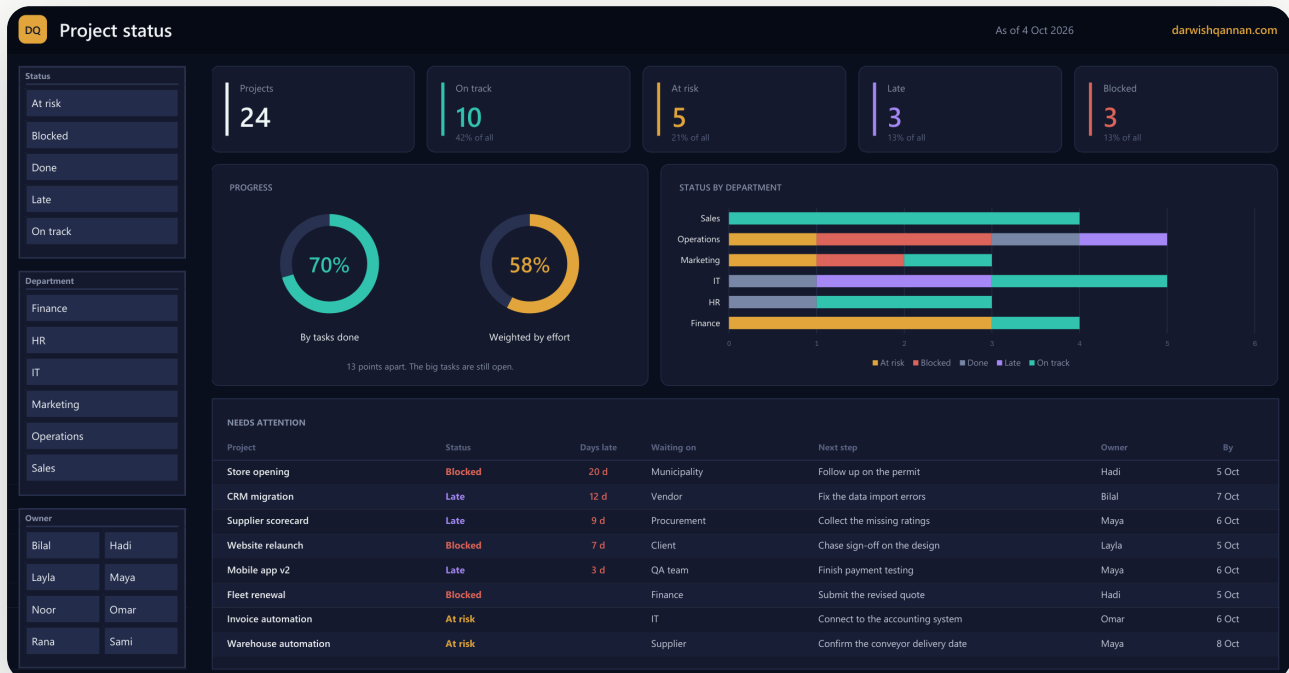
When people choose the status by hand, green stays green for too long. In the template the status is worked out from what you typed, in this order:

1	Done	Effort is at 100%.
2	Blocked	Something is written in "Blocked by".
3	Late	Today is past the due date.
4	At risk	Effort is more than 15 points behind the plan.
5	On track	None of the above.

The first rule that fits wins. A project that is both late and blocked shows as Blocked, because the blocker is what someone has to act on.

The plan line assumes steady progress from start to due date, so it is a simple signal, not a forecast. You can change the 15 points on the Settings sheet.

One screen, read from top to bottom.



Cards

How many projects are in each status, and their share of the total.

Progress

The same portfolio counted two ways. The gap between the rings is the work hiding behind finished tasks.

By department

Where the trouble is concentrated.

Needs attention

The eight most urgent blocked, late or at-risk projects, most overdue first. The title shows how many there are in total. Filter to see the rest.

Three steps, about ten minutes.

1

Put your projects in the Projects sheet

Replace the example rows. Type in the white columns only. The green columns fill themselves in.

2

Set the report date

On the Settings sheet, type today's date. Do this before each report.

3

Refresh

Press Data, then Refresh All. Open the Dashboard and click the slicers to filter by status, department or owner.

What to type for each project

Project, Department, Owner	Names, as your team says them.
Start, Due	The planned dates.
Tasks done, Tasks total	A simple count.
Effort done, Effort total	The size of the work, in days, hours or points. Effort done is the size of what is finished, not the hours spent. Use one unit for every project.
Blocked by	Leave empty unless something outside the team is stopping the work.
Waiting on	Who has the next move: a client, a vendor, another team.
Next step, Next owner, Next date	One action, one name, one date.

Run it from the dashboard, in this order.

1

Start with Needs attention

Go down the list. For each line, confirm the next step, the owner and the date. Change them in the Projects sheet while everyone is watching.

2

Look at the two progress numbers

If the gap is growing, big tasks are being left for the end. Ask which ones.

3

Filter by owner

Click one name at a time. Nobody has to prepare slides.

4

Finish with what changed

Three projects moved to Done, one became Blocked. That is the summary for whoever was not in the room.

The meeting gets shorter because people talk about the projects, not about the report.

Six habits that make a report lie.

Typing the percentage by hand

It drifts toward what people hope. Let the file calculate it.

One line for "status" and "comments"

Split what is true (status) from what is being done about it (next step).

A blocker with no owner

"Waiting for approval" is not an action. Write who will chase it and by when.

Changing the due date quietly

If the date moves, say so in the meeting. Otherwise nothing is ever late.

Too many statuses

Five is enough. More than that and people stop agreeing on what they mean.

A report nobody opens between meetings

Share the file where the team already works, and keep the list short enough to read in a minute.

A one-minute check.

- ☐ The report date is today.
- ☐ Every Blocked project names what it is waiting on.
- ☐ Every line in Needs attention has an owner and a date.
- ☐ No project has been "At risk" for more than three reports without a decision.
- ☐ The two progress numbers are both on the page.
- ☐ Someone who missed the meeting could understand it alone.

Who made this

Darwish Qannan. This template is one small example. I build larger dashboards, client portals and internal tools, and you can try live ones, with made-up data, on my site. darwishqannan.com

The template was made and tested in Excel for Windows. The example projects are made up.