

Reporting, Analytics & Dashboards

By: Martin VanDerSchouw, PMP
Looking Glass Development, LLC

Some basic skills in reporting, analytics and dashboard development could be the difference between success and failure for every project manager. So how do you know where your skills stand? Answer the following questions:

1. Are you still using red, yellow and green coloring to indicate status?
2. Are you using Excel's conditional formatting to color code cells based upon percent complete or other subjective measure?
3. Does it take more than one page to review your portfolio?
4. Are you capable of visually forecasting results for your readers?
5. Can you tie project results to business strategy?

If you answered yes to any of the first three or no to the last two of these questions your reporting skills could be in need of a refresh. A short article can't address every area of reporting and analytics, but here are some basic tips that can help you quickly make some big improvements.

1. **Begin by focusing on your core purpose.** Your job is to communicate where your project is going to end up and not where it is right now. To successfully do this you must report trending and not just current status. This is especially important if you are reporting to senior leadership. Good senior leaders are constantly trying to manage the future and not the right now. When we are working with the right now we are largely in damage control mode. The goal is to direct events to a desired future. If you currently use simple circular indicators to represent status begin using colored arrows. A down arrow can be used to represent performance that has gotten worse since the last reporting period, a side-to-side arrow can be used to represent stable performance, and an upward pointing arrow can be used to represent improved performance. Excel is even capable of altering the images conditionally!
2. **Use a single color and vary the intensity instead of red, yellow and green.** Unfortunately, up to 10% of your audience is color blind. This means your fancy red and green indicators all look the same to those people. Is that what you really want? Additionally, neon colors are just passé and ugly! A color's intensity can be varied enough to make it easily recognizable even when printing in black and white. It is even simple to use the organization's color scheme. Your marketing department will love this!
3. **Use only quantitative measures of progress.** Far too many portfolio reports have some subjective metric as the primary measure of success (such as percent complete), usually with red, yellow and green as the primary indicator of status. Have you ever noticed your projects are consistently reporting a green status until very late in the timeline when miraculously they are red? If you have ever experienced this problem you have been bitten by the subjectivity bug. Another common issue

that exemplifies the same concern occurs when your resources report out their status. Have you ever noticed your resources report out they are right on track until the last possible moment when suddenly they are not, or resources report they are 90% complete, and it takes twice as long to complete the last 10% as the first 90%? At some point you have to ask were you really 90% complete? To succeed you must have quantitative measures of progress. The best two questions to measure progress are how many hours have you spent and how many hours do you have left.

4. **Dashboards belong on a single screen or page.** The primary purpose of a dashboard is to provide a complete picture for comparative purposes. If the user has to scroll or flip screens they often struggle to do the desired analysis. It is your job to make it easy for your readers to find the right information and draw the desired conclusions. Often project managers struggle with reporting and analytics because they are trying to be all things to all people. Don't be caught in this trap. It is a no win scenario. Focus on the five key questions:
 - a. How long is the project going to take?
 - b. How much is the project really going to cost?
 - c. What are we really going to deliver?
 - d. What are the variances to plan and how are we correcting them?
 - e. How does our performance compare to the other initiatives in the portfolio?

If you can answer these accurately and concisely you will be able to focus on the more analytical questions the organization really needs to get answered such as:

- a. Are these results sufficient?
 - b. What changes should be made?
 - c. Are these still the right priorities?
 - d. How well are our project leaders really doing?
5. **Stop using pie charts & stacked bar charts.** Since the advent of PowerPoint, no chart has been more misused than the pie chart. What's the big deal about using a pie chart anyway you might ask. Pie charts and stacked bar charts are commonly used to compare parts of a whole. The idea being it is easy to see one slice or bar is bigger than another. The problem is you cannot say how much bigger. Do you know the formula for a pie slice with one curved side? More importantly, do you really have the time to worry about it even if you did? I hope you answered NO to both questions... A stacked bar chart has the same problem because only the first bar starts at zero. When you need to compare parts of a whole or counts use a horizontal bar chart. When you do all the options start at zero and it is easy to make visual comparisons. It also makes more effective use of human visual perception psychology.
6. **In a dashboard place the important information in the upper left or center of the page.** English speakers read from the upper left to lower right. Good dashboard design takes this into account and places the most important information in the upper left quadrant or in the absolute center of the screen because those are the first two places noticed. Never place important information in the lower right corner.

There are a lot of other simple, practical tips you can use to improve your reporting, analytics and dashboards, but these six can quickly make a big impact on your communication abilities and in turn your success. Above all else, remember that reporting and dashboards are all about providing guidance about the future.