

Monthly Reporting Checklist

Make sure a monthly programme report says what leadership actually needs — status, exposure and the decision required.

Who it's for: Planners and controls managers preparing monthly reports.

When to use it: Every reporting cycle, before the report is issued.

Areas: Progress & data-date discipline · Critical path & forecast · Risk & change · Decisions & actions

Work down the list; a "No"/unchecked item is a question to resolve, with the finding recorded alongside.

- ☐ One-line status and the trend since last period
- ☐ The decisions required this period, stated up front
- ☐ Progress against baseline (planned vs actual)
- ☐ Current critical path and how it has changed
- ☐ Forecast completion, with its basis
- ☐ Cost position and forecast (with EVM indices where used)
- ☐ Change status — approved, pending and potential
- ☐ Top risks with owners and movement since last period
- ☐ EOT and claims status, without contractual overstatement
- ☐ Actions with owners and dates; last period's actions closed out
- ☐ Figures reconcile with the schedule and cost systems
- ☐ Bad news is early and plainly stated, not buried

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