Periodic Reports

Periodic Reports (Status Reports) are similar to progress reports. Both serve to provide audience members with the details of an ongoing project. However, the progress report is usually sent at certain milestones of a project, while periodic reports are sent at regular intervals: daily, weekly, monthly etc.

Audience: depending upon the purpose of the periodic report, audience members may vary. Because of the specificity of the information, your periodic report could go to your manager, and from him or her, it could be turned over to other managerial members. Your report could become part of a larger report or stand on its own.

Purpose: the purpose of a periodic report is to provide information. The information on a periodic report is objective.

A periodic report that is being provided as a quarterly or annual report should be written as a formal report.

If your company does not have a specific template, for your first periodic report, create a template and use that template for the following reports. Before creating your report, you should determine exactly what information that you will provide and what is the purpose. After you have identified the types of information, you will break each area into the specific content and use a heading for quicker access to the information.

1. Subject Line is the title of the report and can be centered or justified on the left. The name of the company, the title of the periodic report, and the date
2. For each section following the subject line, you will create headings for groups of content information.

Typically, periodic reports are not written in a narrative but do require headings, bullets, and columns.

- Internal reports can be sent via a memo or an e-mail
- Outside of your company, send a letter
- Use headings for organization of your report
- Keep narrative clear and concise
- Report routine and numerical data in graphs or tables
- Create this information in a template and use the same one for each consecutive report that follows the first