



White Paper 2024-04

Why is There a Need for Owners to Produce End-of-Development Phase Reports?

When supporting owner clients, we are often challenged over the need to develop full reports at the end of project development phases (such as scoping, preliminary feasibility and detailed feasibility). Still, we do insist on the production of those reports. This White Paper explains why it is important to invest the time in producing those comprehensive reports.

Expected reports at the end of project development phases

When an owner develops a project, a gate-based process is generally applied with key milestones where the project maturity gets reviewed and go/no-go decisions are taken on the project (refer to our White Paper [2023-02 'Why Industrial Project Definition Needs to be Split in Stages'](#)).

At that occasion it is common practice for the project development team to produce a comprehensive report describing the current maturity. This report generally contains an executive summary, and detailed chapters covering all aspects of the project, technical maturity, understanding of project environment in its wider sense, and preparedness for the next project phase.

However, producing such a report is quite an onerous and time-consuming process and we are often challenged on the need to produce such a deliverable: would it not be sufficient to show the set of available deliverables from the various studies that have been conducted during the last project development phase in a PowerPoint summary presentation?

Objectives of the end-of-development-phase report

In addition to providing a support and reference for scoping milestone decision (and possibly for future financing), such a report aims to:

- Ensure an overview of the project that is comprehensive (covers all expected maturity areas) and consistent between disciplines/areas,
- Describe the scope of the next project phase and detail the execution plan for the next project phase:
 - Systematically assess open points and actions for each discipline,
 - Identify risk mitigation actions / opportunity exploitation actions from risk & opportunity process,
 - Take the overall project execution view and identify long lead items / early works required to meet the overall project schedule,

- Define the reference project scenario for the next phase and possible open options to be investigated if relevant at this stage of project development.

What happens if no comprehensive project report is produced

If the project team skimps on the production of the report, and this is accepted by project governance, we have observed the following major consequences:

- Consistency of all the studies performed is not verified, leading to an unsound basis for future studies,
- Lack of assurance that estimates are all based on the basis of a consistent set of assumptions, and that their uncertainty level is consistent across the board,
- Possible blind spots in the value chain of the project either in execution or in terms of project scope, and in the risk analysis of the project
- Frequent lack of maturity of the project preparedness for the next phase (as this is generally not part of the natural deliverables of the previous phase).

In reality, having the project team go through the process of report production provides the following benefits:

- By working on this report as a team, a teambuilding effect happens after a phase where each member may have conducted its work relatively independently, thus ensuring team awareness on project assumptions. This leads to natural identification of inconsistencies, blind spots and problems,
- The process of writing the report itself requires to be able to write down a logical, systemic story for the project. This process often allows to understand the source of challenging project assumptions, which may lead to recommendations to explore alternative options in the next phase, which would not have been identified without this effort of taking a more systemic view of the project,
- Each contributor is provided some time to take a high-level view of its portion of the project after a phase

We really recommend owner teams to take the time and effort to step back and produce comprehensive reports of the project maturity status at the end of each project development phase.

It is time that will be well spent taking a high level, systemic view of the project, ensuring consistency across the board, and possibly questioning some assumptions.

where delivery urgency was paramount, and this enables everyone to analyse with a clearer head the project.

Such benefits are clearly worth spending a couple of weeks producing this report. This downtime in preparation for the decision milestone must have been planned in advance to avoid using it as a buffer that can be crashed if needed.

Summary

We really recommend owner teams to take the time and effort to step back and produce comprehensive reports of the project maturity status at the end of each project development phase, and in preparation for the decision milestones.

It is time that will be well spent taking a high level, systemic view of the project, ensuring consistency across the board, and possibly questioning some assumptions. In addition to ensuring a better project maturity at the milestone, it will feed the next project phase with the right objectives and activities to make the project more successful.

Read the Industrial Projects Practical Owner Guide

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