Client Reporting

Purpose of client reporting in construction

- Provides a structured, repeatable way of sharing key project information (time, cost, quality, health and safety) with the client and other stakeholders.
- Supports informed decision making by turning site data into clear insights on progress, risks, and required actions.
- Builds trust and accountability through transparent communication about what has been achieved and where issues are emerging.
- Creates an auditable record of what happened on the project and when, helping with dispute resolution and future lessons learned.

Main types of client-facing reports

- **Progress updates**: Summaries of milestones achieved, work completed in the period, and activities planned for the next phase, indicating whether the project is ahead, on, or behind programme.
- **Cost and financial summaries**: Snapshots of current expenditure versus budget, including variations, provisional sums, and forecasts to completion.
- **Programme and schedule reports**: Comparisons of actual progress against the baseline schedule, highlighting any slippage, critical path impacts, and proposed recovery measures.
- **Risk, quality, and safety reports**: Records of incidents, near misses, risk register updates, quality inspections, and non-conformances, together with corrective or preventive actions.
- **Change documentation**: Formal records of changes to scope, specification, or design, including justification, cost/time implications, and client approvals.
- **Daily or weekly site records**: Brief logs capturing labour, plant, weather, key visitors, and notable events that feed into higher level reports.

Core elements of high-quality reports

- Clear structure with consistent sections (executive summary, key metrics, issues and actions, appendices).

- Concise narrative supported by visual material such as photographs, charts, dashboards, and marked up drawings.
- Focus on exceptions and trends rather than raw data alone, directing the client's attention to what needs decisions or intervention.
- Explicit links between issues, risks, and their potential impact on time, cost, and quality objectives.

Good practice in delivering client reports

- Agree reporting frequency and format at project outset (e.g. weekly operational reports, monthly board level reports).
- Use plain, professional language and explain technical terms so non specialist stakeholders can understand.
- Be open about challenges, delays, and cost pressures, presenting proposed mitigation measures alongside the problems.
- Tailor the level of detail to the audience: strategic, high-level information for senior clients; more technical data for project managers.
- Use digital platforms or common data environments to automate data capture, reduce errors, and allow real time access to information.
- Ensure reports are issued on time, logged, and archived so that there is a clear communication trail throughout the project life cycle.

Self-assessment Task

P5 Criterion. Describe the key principles of construction project management.

Discuss the role of client reporting as a key principle of effective construction project management.

In your response, you should:

- Describe what is meant by client reporting in a construction context and why it is important throughout the project life cycle (from pre-construction to handover).
- Identify and describe the main types of reports provided to clients (for example, progress, cost, programme, risk/health and safety, and change/variation reports), stating the typical information each one contains and who is responsible for producing it.
- Outline the best practices for delivering effective client reports.

Handover Stage

Purpose

- Fulfilment of all project requirements/Client Brief/Plan of Use/Requirement Brief/sustainability outcome.
- Client satisfaction with the final outcome.

Key Activities:

1. **Preparation of Handover Documents:** The principal designer compiles essential project information, including Operation and Maintenance Manuals, Health and Safety Files, BIM data for facility management, etc.
2. **Quality Assurance of Contractor's Work:** The principal designer inspects the contractor's work to confirm it meets high-quality standards.
3. **Client Coordination:** Continuous engagement with the client by the principal designer to ensure their satisfaction and address any unresolved issues.
4. **Support and Maintenance:** Provision of ongoing assistance, training, and maintenance services to the client by the principal designer.
5. **Post-occupancy Evaluation (POE):** Conducted by the principal designer, this evaluation occurs during the defect liability period (6 to 18 months after practical completion). It aims to:
    - Assess the effectiveness of the project delivery process.
    - Evaluate the performance and success of the completed development.
    - Identify opportunities for enhancement.
    - Extract lessons for future projects.

This stage emphasises the importance of thorough documentation, client engagement, quality assurance, and reflective evaluation to ensure the successful conclusion and continuous improvement of construction projects.

Self-assessment Task

P5 Criterion. Describe the key principles of construction project management.
Describe how the handover and early occupation stage is managed as a key principle of construction project management.

In your answer, you should:

- Describe the main purposes of the handover and occupation stage (for example, meeting the client brief, ensuring the building is safe and usable, and achieving client satisfaction).

- Outline the key activities involved, such as preparing and issuing handover information (O&M manuals, health and safety file, as-built drawings), inspecting and snagging the works, and providing user training.
- Describe how the defects liability period is managed, including how defects are reported, recorded, and rectified, and how support is provided to the client during early occupation.
- Explain what is meant by post-occupancy evaluation (POE) in simple terms and briefly describe how feedback from users and building performance data can be collected after occupation.