Guidelines for the first Interim Report

The goal of the first interim report and presentation is for the group to provide the faculty, the class, and, most importantly, the client organization with a detailed description of the group’s progress to date to address the client’s problem. The report should be self-contained and focus on the achievements made towards meeting the goals set forth in the Project Definition Report.

First, the interim report should review the client’s problem(s) and, when relevant, provide additional details. The initial problem definition is usually based only on discussions with the client. Now that the group has had a chance to investigate/research/analyze the problem, the problem definition may be improved, can be more focused, or may even be modified. To be able to properly define the problem, it may be helpful to provide detailed process flow information, a detailed facility layout, detailed inventory turnover per SKU, or product group, etc. Furthermore, the data that you collected may have allowed you to establish the magnitude/severity of the problem in a quantitative way, e.g., number of missed deadlines per month, together with the average late time, variance of the average late time, etc.

Second, the interim report should focus on the causes of the client’s problem(s). If no causes were suggested at the start of the project, then discussing possible causes that were identified during the initial analysis is necessary. If various possible causes were suggested, then the analysis may indicate which are the more important ones. It is important to justify any conclusions, preferably with quantitative data.

Whenever data are used to illustrate a point, the report should discuss how the data were obtained and a copy of the data, if possible, should be provided in an appendix. It is best to only present summary tables, bar charts, pie charts, and graphs in the report itself. They should be used to illustrate or highlight a point being made in the text. Even the data in an appendix should be “readable.” There is no point in including huge tables with 100,000s of data elements that nobody will ever read.

Third, the interim report should focus on the goals and objectives for addressing the problem. Note that these may have changed or need to be adjusted based on the better understanding of the problem and the initial findings of the problem analysis. The client should be aware of such adjustments.

Next, the interim report should discuss the sequence/set of tasks that will be carried out during the remainder of the project to meet the objectives. Some detail is warranted. For example, if a simulation model will be developed and a simulation study will be conducted, it is important to indicate how the simulation study will help address the client’s problem, what type of questions will be answered using the simulation study etc.

Finally, it is important to present a candid assessment of the current project state. Is the project still on schedule. If not, provide explanations why the project is no longer on schedule and what the implications are. Is it still realistic to expect that the project will be completed on time? Is it necessary to adjust the set of deliverables, etc. Provide an updated timeline for the remainder of the project.
Clearly, the above guidelines will not apply exactly to all the projects, but they do reveal at a high level what is expected of the interim report. If your project is not the typical industrial engineering design problem, discuss the content of the interim report with your advisor.

The report should be substantive, yet succinct. The report (excluding appendices) should not be more than 15-20 pages. The presentation, summarizing the report, should take no more than 15 minutes.