**SITREP Template**

**Project or Department Name:** This gives context to what the SITREP will be about.

**Today’s Date:**

**Time Period Covered by SITREP:** (optional if not issued at regular intervals)

1. **Current Situation:** What has happened and where are we now?

This can be in paragraph or bullet point format, so long as it is brief. It should include a brief summary of the overall situation to date with critical information, such as a description of where the project is in its timeline, or the inciting incident that prompted a SITREP. Ensure old information is deleted.

1. **Actions to Date:**

What have we already done to address the incident, or what have we done recently to advance the progress of our initiative?

* Brief reporting of actions already taken
* Table format could be used to illustrate progress, such as completion of milestones.
1. **Actions to Be Completed:**

What will be done next?

* Brief reporting of scheduled or planned next steps.
* If a regularly occurring SITREP, only state actions to be completed in the next SITREP period.
* Where does the operation expect to be by the next SITREP?

**4.0 Issues, Risks, or Upcoming Decisions:**

This section contains the key takeaways and next steps needed from leadership and your stakeholders.

* Issues should include the plan to resolve and date expected for resolution.
* Risks (uncertainties) should include the probability, impact, and steps being taken to mitigate.
* Upcoming decisions should be clear about the alternatives evaluated, the recommendation, and the date needed for decision.

**SITREP Example (Written)**

Project Update

**Project or Department Name:** Enterprise CRM Implementation

**Today’s Date:** February 27, 2025

**Time Period Covered by SITREP:** Feb 20-27, 2025

1. **Current Situation:**

We are in month 4 of our 6-month CRM implementation project. Overall, the project is tracking yellow due to integration challenges with our legacy systems. We are currently 2 weeks behind on the data migration workstream but on schedule for the user interface customization and training development workstreams. We have spent 65% of our budget,and completed approximately 55% of the planned work.

1. **Actions to Date:**
2. **Engaged vendor technical support to address API integration failures**
3. Completed user interface customization for the Sales module
4. Finalized data mapping documentation for customer records
5. Conducted two successful test migrations with sample data sets
6. Completed development of training materials for Sales and Marketing teams
7. **Actions to Be Completed:**
8. Resolve API integration issues with legacy order mgmt system (Target: Mar 4)
9. Complete third test migration with expanded data set (Target: March 2)
10. Begin pilot user training sessions with Sales team (Starting: Mar 5)
11. Finalize data validation processes for full migration (Target: Mar 7)
12. **Issues, Risks, or Upcoming Decisions:**

**Issue:** Legacy order system integration failures are causing delays in the data migration workstream. Vendor support has identified the root cause and provided a patch that requires testing. **Expected resolution: March 4** If resolved by March 4, we believe we can make up ground to get back on schedule and meet the target deployment date.

**SITREP Examples (Verbal)**

**1. Software Release Delay**

"We planned to release version 4.0 of our customer portal next week, but we've discovered a critical security vulnerability during final testing yesterday. We've identified the source of the vulnerability and our development team has already implemented a fix. The fix is currently in testing, which we expect to complete by tomorrow afternoon. We need to decide by end of day whether to proceed with the original release date with the patched version or postpone the release by one week to allow for additional security testing."

**2. New Hire Onboarding Issue**

"We're halfway through onboarding the 15 new sales representatives hired for the eastern region expansion. Everyone has completed compliance training and product knowledge sessions. However, we've encountered delays with system access provisioning due to an unexpected issue with our identity management system. IT has implemented a temporary workaround for critical systems, and they're working on a permanent solution expected by Thursday. The main risk is that the sales team won't have full CRM access for their first client meetings scheduled for Friday. We need guidance on whether to reschedule those initial client meetings or proceed with limited system access."

**3. Supply Chain Disruption**

"Our primary component supplier in Malaysia notified us this morning about a factory shutdown due to local flooding. They estimate production will be offline for 7-10 days. We currently have four weeks of inventory for most components but only two weeks for the specialized processors. We've already contacted our secondary supplier in Taiwan, who can provide emergency shipments of the processors within 10 days but at a 15% premium. Our operations team is adjusting production schedules to prioritize products that don't require these components. We need a decision on whether to approve the premium pricing from the secondary supplier or adjust our Q2 delivery commitments to customers."

**4. Marketing Campaign Performance**

"Our new digital campaign has been running for two weeks now. We've reached 85% of our impression targets but are seeing conversion rates at only 2.3%, which is below our 3.5% target. The team has analyzed the performance data and identified that mobile conversions are significantly underperforming desktop. We've already optimized the mobile landing pages and updated the ad creative for better mobile engagement. We're planning to shift 30% of the remaining budget to the best-performing channels based on initial results. The key question is whether we should extend the campaign by an additional week at the same budget to make up for the slow initial performance."

**SITREPS: Tips and Tricks**

**Structure First**

Before speaking, quickly organize your thoughts into the four SITREP components: situation, actions taken, planned actions, and issues/decisions. This mental framework ensures you won't ramble or forget critical information.

**Time Anchors**

Include specific timeframes and deadlines throughout your SITREP. Phrases like "as of this morning," "by next Tuesday," or "within the next 24 hours" create clarity and urgency around your information.

**Decision Framing**

When presenting decisions needed, clearly articulate the options, trade-offs, and your recommendation. This makes it easier for leaders to make informed choices quickly without requiring follow-up questions.

**Avoid Jargon Overload**

Tailor your terminology to your audience. Technical terms may be appropriate with your team but can create confusion when speaking with executives or cross-functional stakeholders.

**Practice Precision**

Use specific numbers and metrics rather than vague descriptions. "Conversion rates dropped 15%" is more informative than "conversion rates are down significantly."

**Emotional Neutrality**

Deliver information factually without excessive emotion or blame language. This maintains credibility and keeps the focus on solving problems rather than assigning fault.

**Active Voice Priority**

Use active rather than passive voice to clarify who is doing what. "The development team completed testing" is clearer than "testing was completed."

**Rehearse Complexity**

Practice explaining complicated situations before delivering your SITREP. If you can't explain a complex issue clearly in a few sentences, you may not understand it well enough yourself.