

Portfolio Status Overview Report

Date: _____

Prepared by: _____

1. Executive Summary

Brief summary of portfolio status, key risks and opportunities. (Enter overview here...)

2. Client Portfolio Overview

Client	Project	Status	Progress	Key Risks / Issues	Next Steps
[Client A]	[Project Name X]	[On Track / At Risk / Delayed]	[Description or % Complete]	<ul style="list-style-type: none">[Risk/Issue 1][Risk/Issue 2]	<ul style="list-style-type: none">[Next Step 1][Next Step 2]
[Client B]	[Project Name Y]	[On Track / At Risk / Delayed]	[Description or % Complete]	<ul style="list-style-type: none">[Risk/Issue 1]	<ul style="list-style-type: none">[Next Step 1]
[Client C]	[Project Name Z]	[On Track / At Risk / Delayed]	[Description or % Complete]		<ul style="list-style-type: none">[Next Step 1]

3. Risks and Mitigations Overview

Risk / Issue	Affected Clients/Projects	Impact	Mitigation / Action	Owner
[Example risk e.g. Resource Availability]	[Client A, Project X]	[High / Medium / Low]	[Mitigation steps]	[Person's Name]

4. Upcoming Milestones

Client	Project	Milestone	Planned Date	Status
[Client A]	[Project X]	[Milestone 1]	[Date]	[On Track / Delayed]

5. Action Items & Decisions

Action / Decision	Owner	Due Date	Status
[Description]	[Person]	[Date]	[Open / Closed / In Progress]