

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] |