|  |
| --- |
| **Post Implementation Review Report** |

**Document Information**

|  |  |  |  |
| --- | --- | --- | --- |
| **Sponsor** |  | **Business Owner** |  |
| **Project Manager** |  | **Estimated Budget** |  |
| **Target Start Date** |  | **Target End Date** |  |

**Document History**

|  |  |  |
| --- | --- | --- |
| **Version** | **Date** | **Summary of changes**  |
| 1.0 |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Document Approvals**

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Signature** | **Date** |
| Project Sponsor |  |  |  |
| Committee Member |  |  |  |
| Committee Member |  |  |  |
| Committee Member |  |  |  |
| Project Manager |  |  |  |

Table of Contents

*[Update this Table of Contents after completing the remainder of this document.]*

[Executive Summary 1](#_Toc42508918)

[Background 1](#_Toc42508919)

[Key Deliverables 1](#_Toc42508920)

[Project Results 1](#_Toc42508921)

[Final Results of Schedule and Costs 2](#_Toc42508922)

[Reasons for variance 2](#_Toc42508923)

[Benefits Realized 2](#_Toc42508924)

[Major Challenges and Barriers 2](#_Toc42508925)

[Scope Features/Functions Wanted but not Delivered 2](#_Toc42508926)

[Lessons Learned 3](#_Toc42508927)

[Lessons Learned Methodology 3](#_Toc42508928)

[Lessons Learned 3](#_Toc42508929)

[Agency Readiness 3](#_Toc42508930)

[Communications & Stakeholder Management 3](#_Toc42508931)

[Cost Management 3](#_Toc42508932)

[Executive Sponsorship & Governance 3](#_Toc42508933)

[Implementation Approach & Methodology 3](#_Toc42508934)

[Organizational Change Management 3](#_Toc42508935)

[Procurement/Contract & Vendor Management 3](#_Toc42508936)

[Project Management/Project Controls 3](#_Toc42508937)

[Project Team/Human Resource Management 4](#_Toc42508938)

[Schedule Management 4](#_Toc42508939)

[Scope Management 4](#_Toc42508940)

[Other 4](#_Toc42508941)

[Recommendations 4](#_Toc42508942)

Template Guide

*[Delete this section after completing the remainder of this document.]*

**What is a Post Implementation Review?**

The Post Implementation Review is an assessment and review of the project and final solution and provides for official completion of the project. The report summarizes the purpose of the project and whether the project achieved the stated scope, schedule, budget, and stated benefits. The document further describes aspects of the project that went particularly well and those that could have gone better, or risks and issues that could have been avoided had different actions been taken.

**Why a Post Implementation Review?**

The Post Implementation Review evaluates whether the objectives were met, how effectively the project was run, lessons for the future and actions required to maximize the benefits from the project outputs.

**How to Use this Template**

This template provides a guide for project managers to summarize and document the outcome and lessons learned of a completed project. Additional sections may be added or removed according to the specific business circumstance and need. Example tables and charts have been included to provide further guidance on how to complete each relevant section.

*Italicized instructions are included throughout this template to explain the purpose of and how to complete each section of the document.* ***These should be deleted from the final document.***

# Executive Summary

*This is a high-level summary that provides readers with a quick synopsis of the full close out report including final outcomes and content from the charter such as vision, objectives/goals, scope, key deliverables and the degree to which the project was successful. May also include any outstanding items of importance to the sponsor(s) and/or business owner.*

## Background

*Provide high level summary information needed to understand the project context, including but not limited to, product and features implemented, major stakeholders/customers, scope of the project, summary level schedule/milestones, summary budget figures, etc.*

*Provide summary description of the project management approach for the effort. How was project structured, coordinated and managed? Describe the level of effort for the project – was this one phase or one of many phases addressing a larger solution. Identify any key decisions with significant meaning or influence on the outcome of the project. Is there other key information important to include in the background?*

## Key Deliverables

*Provide the original information from the charter and identify any adjustments made during the project.*

The following table identifies the key milestones and deliverables for the project.

**Key Milestones and Deliverables**

| **Milestone/Deliverable** | **Target Date** | **Complete Date** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Project Results

**Did the project deliver the expected functionality?** [ ]  Yes [ ]  No

*Briefly describe what the expected functionality was and how it was successfully delivered. If the project did not deliver the expected functionality, describe why.*

**Did the project achieve the identified objectives and goals?** [ ]  Yes [ ]  No

*Briefly describe the objectives and goals, identify the measures used to demonstrate achievement. If objectives and goals were not met, describe why.*

## Schedule and Costs

*Provide a detail of the schedule including planned and actual start/finish dates. Identify the variance between baseline and final schedules. Provide a rollup of planned and actual dollars, FTE’s and hours for project costs. Identify the variance between the original planned budget and final expenses. A sample table follows.*

|  |  |  |  |
| --- | --- | --- | --- |
|  | Planned | Actual | Variance |
|  | **Start** | **End** | **Start** | **End** |  |
| Schedule |  |  |  |  |  |
|  | **Dollars** | **FTEs** | **Dollars** | **FTEs** | **FTEs** | **Hours** | **Dollars** | **FTEs** | **Hours** |
| Costs |  |  |  |  |  |  |  |  |  |

### Reasons for variance

*If there was a variance between the planned and actual, describe the key reason(s) for the variance This section typically includes a summary of change requests that impacted schedule.*

## Benefits Realized

*Briefly describe the benefits of the project and resulting product or solution. If no benefits were realized, describe why.*

1.
2.
3.

## Major Challenges and Barriers

*Describe the major challenges and barriers of the project and how they were addressed. Identify any remaining challenges or barriers o which the business should be aware.*

1.
2.

## Scope Features/Functions Wanted but Not Delivered

*Identify scope items (including features, functionality, or service deliverables) that was originally envisioned for the project but that was not delivered. Describe why they were not delivered and if there is a plan to pursue the feature or functionality soon. Includes a summary of change requests that impacted scope.*

1.
2.

# Lessons Learned

## Lessons Learned Methodology

*Briefly describe the methodology (e.g., facilitated discussion, survey) used to identify lessons learned from the project. Identify who contributed to the effort.*

## Lessons Learned

*This section summarizes aspects of the project that went well or that were major issues that could have been avoided with the proper actions. Focus on lessons learned that, when applied to future projects, could help achieve similar successes or avoid similar challenges.*

### Agency Readiness

*Performing the work to conduct the necessary due diligence, ensure strong sponsorship and governance and establish suitable project management, resourcing and implementation approaches to support project success.*

### Communications & Stakeholder Management

*Performing the work to identify stakeholder groups and the potential impacts on them of project activities and outcomes. Includes communicating and working with stakeholders to meet their needs and expectations, address issues as they occur and foster appropriate stakeholder engagement throughout the project life cycle.*

### Cost Management

*Performing the work involved in planning, estimating, budgeting, financing, funding, managing and controlling costs so that the project can be completed within the approved budget.*

### Executive Sponsorship & Governance

*Performing the work to establish the vision, secure resources, articulate the project's objectives and expected outcomes, guide and champion the project, remove roadblocks and ensure timely decision making. The project sponsor is accountable for enabling success.*

### Implementation Approach & Methodology

*Performing the work to establish, maintain and follow a systematic approach to accomplishing the work necessary to achieve project goals.*

### Organizational Change Management

*Performing the work to establish the process, tools and techniques to manage the people side of change and increase user adoption.*

### Procurement/Contract & Vendor Management

*Performing the work to ensure contractual agreements are adhered to, research and source vendors, negotiate contracts, manage relationships and evaluate performance.*

### Project Management/Project Controls

*Performing the work to establish and follow a formal methodology to manage project activities and achieve project objectives. Includes the control documents (e.g., charter, project management plan, workplan and schedule) to support project management activities.*

### Project Team/Human Resource Management

*Performing the work to organize, manage, lead and develop the project team.*

### Schedule Management

*Performing the work to manage the timely completion of the project.*

### Scope Management

*Performing the work to ensure that the project includes all the work required, and only the work required, to complete the project successfully.*

#

# Recommendations

*This section summarizes the key recommendations, based on the lessons learned identified in the previous section, for a future project team. Consider those unique practices that offer valuable “hindsight” for a future project. Complete the statement, “Next time, I would:”*