<Project Title>

Project Review

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1. PROJECT OVERVIEW

|  |  |  |  |
| --- | --- | --- | --- |
| Project Name: |  | | |
| Project Commenced: |  | Project Complete: |  |
| Project Manager: |  | | |
| Project Sponsor: |  | | |
| Review Author: |  | | |
| Review Date: |  | | |

* 1. Project description

<Briefly describe the background to the project and the problem it was intended to solve and/or the opportunity it was intended to realise. If this review focuses on one aspect or phase of the project, be sure to explicitly state what is out of scope of the review.>

* 1. Intended outcomes

<List the outcomes intended to be achieved by the project. In other words, who is going to benefit from the project’s deliverables and how will they benefit? There could be multiple impacts planned (both positive and negative) for multiple stakeholders.>

* 1. Strategic objectives

<Detail how these outcomes align to the strategic objectives of the organisation that paid for the project. You should make specific reference to the organisation’s mission, values, strategic or annual Plan(s) to evidence this.>

1. REVIEW METHODOLOGY
   1. Documents reviewed

<List the sources from your ‘desktop’ research. In addition to the standard suite of project documents, this might include authoritative reports, cases, relevant legislation and reviews of like projects etc. Note also any relevant documents that you were unable to locate/access/review.>

* 1. Stakeholders consulted

<List all the stakeholders you directly spoke to or surveyed when conducting the project review. These might include internal business resources (such as project team members, sponsor(s) and impacted departments); external sources (such as contractors or consultants); and end-users (such as the client and user community). List who you consulted with, who they represent, their relationship to the project, and how you engaged with them. Also note any key stakeholders who did not participate and the potential impact on your review.>

1. PROJECT PERFORMANCE
   1. Performance against baseline plans

|  | Planned | Actual | Variance |
| --- | --- | --- | --- |
| Schedule |  |  |  |
| Budget |  |  |  |

* + 1. *Performance against baseline scope*

<Discuss how the project performed against its originally planned scope, including an explanation of any shortfalls and/or opportunities or innovations realised.>

* + 1. *Performance against baseline schedule*

<Discuss how the project performed against its originally planned schedule, including an explanation of any shortfalls and/or opportunities or innovations realised.>

* + 1. *Performance against baseline budget*

<Discuss how the project performed against its originally planned budget, including an explanation of any shortfalls and/or opportunities or innovations realised.>

* 1. Changes

<Where changes were authorised during the project (*eg* relating to scope, time, cost, quality), describe the effect of each change on the Project Plan and its impact on the intended project outcomes. Clearly distinguish changes in response to invalid assumptions or planning error versus customer initiated (and funded) changes.>

* 1. Outcomes

<Provide details of the benefits that have been achieved as a result of project implementation (those outcomes that can be seen and measured at this point in time). Be sure to include details of how these outcomes have been measured. Note that outcomes can be positive or negative for stakeholders.>

* + 1. *Outcomes yet to be realised*

<Detail which outcomes, as outlined in the project’s Business Case, have not been achieved as a result of implementation but have been identified for later realisation. Be sure to include details of when these will be achieved (including any prerequisites) and how they will be measured.>

* + 1. *Unplanned outcomes*

<Detail outcomes **not** anticipated in the project’s Business Case that have either been achieved as a result of implementation or have been identified for later realisation. Be sure to include details of when these will be achieved (including any prerequisites) and how they will be measured.>

1. OPEN ACTIONS
   1. Open project issues

<Some projects are handed to the client without being ‘perfectly’ finished. List here any issues that the organisation and/or client should be aware of and who is responsible for resolving them.>

| Issue description | Proposed action | Owner |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

* 1. Residual risks

<Even though the project has been delivered, there may still be some risks to implementation going forward – discuss these here.>

| Risk description | Proposed treatment | Owner |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

* 1. Handover/training needs

<Identify any additional handover or training requirements, if any, that are required post-project.>

* 1. Other required activities

<Provide an overview of any operational activities that are proposed to further enhance project outputs or outcomes.>

1. LESSONS LEARNED

<This section is all about critical analysis. Lessons can come directly from stakeholders or your own observation. The sub-questions are suggested to motivate discussion and need not be individually or exclusively answered. For some topics, you might simply acknowledge that there were no major issues or lessons to be learned – for others, you may present several hundred words of analysis. Where you place your emphasis depends on the specifics of the project you are reviewing.>

**Very good** – We exceeded the expectations of our organisation and our stakeholders. We should apply this standard to future projects.

**Good** – We met the expectations of our organisation and our stakeholders. We should lock in learnings to ensure this continues.

**Poor** – We failed to meet the expectations of our organisation and our stakeholders. Focus should be placed upon improving in this area.

* 1. Stakeholder identification and engagement

What worked well? Where are the opportunities for improvement? For example:

* Were all stakeholders identified early in the project?
* Were all stakeholders satisfied with the level of communication they received?
* Were there any particular stakeholder risks that emerged during the project?
* What was the most effective and/or least effective methods of communication used?

**OVERALL RATING**: Very good | Good | Poor

* 1. Business case development

What worked well? Where are the opportunities for improvement? For example:

* Was a business case prepared for this project?
* Was it approved by the appropriate personnel?
* Was the business case based on sufficient research and consultation?
* In hindsight, what was missing from the business case?

**OVERALL RATING**: Very good | Good | Poor

* 1. Scope definition and management

What worked well? Where are the opportunities for improvement? For example:

* Was the scope clear and concise?
* Did it clarify what was not in the project scope?
* Were the assumptions and constraints identified reflected in documented risks and issues?
* Did any issues emerge in regards to the project scope?
* Were all stakeholders supportive of the scope?

**OVERALL RATING**: Very good | Good | Poor

* 1. Schedule development and control

What worked well? Where are the opportunities for improvement? For example:

* Was the project schedule documented and agreed?
* Was the schedule realistic?
* Did it identify critical path, dependencies, resourcing?
* What tools were used to document the schedule?
* What issues were encountered regarding the project’s schedule?
* How were these resolved?

**OVERALL RATING**: Very good | Good | Poor

* 1. Cost estimating and control

What worked well? Where are the opportunities for improvement? For example:

* How were project costs estimated at the business case and project plan stages?
* Were the cost estimates proven accurate?
* How were project costs tracked and controlled during the project?
* Did the project manager have sufficient visibility over costs and authority to control them?

**OVERALL RATING**: Very good | Good | Poor

* 1. Procurement / contract management

What worked well? Where are the opportunities for improvement? For example:

* What goods, services or results were procured for this project?
* Was the procurement process governed ethically?
* Were there any issues in regards to contractor relationships or performance, delivery of goods or services, or achievement of results?
* Was there a process whereby previous contractor performance could be reviewed, or current contractor performance documented for future reference?

**OVERALL RATING**: Very good | Good | Poor

* 1. Risk identification, prioritisation and treatment

What worked well? Where are the opportunities for improvement? For example:

* How were risks identified for the project?
* Was the management of risks effective?
* What risks emerged as issues to affect the project?
* Were contingencies allocated to manage project risks?
* Did the project need to draw on management reserves?

**OVERALL RATING**: Very good | Good | Poor

* 1. Project team management and performance

What worked well? Where are the opportunities for improvement? For example:

* How were project resources identified and recruited to the project?
* Did the project manager have sufficient staff authority during the course of the project?
* How were training, development and performance reviews conducted?
* Was conflict managed constructively

**OVERALL RATING**: Very good | Good | Poor

* 1. Project governance and change control

What worked well? Where are the opportunities for improvement? For example:

* What governance processes were in place for this project?
* Was the governance appropriate and effective?
* Were the project sponsor, steering committee and client appropriately informed throughout the project?
* Was the project manager effectively supported and guided throughout the project?

**OVERALL RATING**: Very good | Good | Poor

* 1. Project delivery and handover

What worked well? Where are the opportunities for improvement? For example:

* What was the process for project delivery and handover?
* How was this planned, documented and executed?
* Was sufficient information or training provided?
* Was there a formal acceptance process?
* Is there a defect liability period in place?
* How is this being monitored and by whom?

**OVERALL RATING**: Very good | Good | Poor

* 1. Other lessons learned

What worked well? Where are the opportunities for improvement? For example:

* What came up in your review that is not covered by the topics above?
* Can it be verified by more than one source?
* What about the culture of the organisation?
* Is there a place for saving and accessing lessons learned?
* Is there something specific to the organisation that is worthy of mention?

1. PROJECT MANAGEMENT TEMPLATES, TOOLS AND ASSETS

<Identify the key documents, systems and software used to manage the project, and discuss the extent to which they assisted or impeded project delivery. Identify what worked well, as well as opportunities for improvement.>

1. CONCLUSION

<Summarise your overall impressions of project performance.>

1. RECOMMENDATIONS / ACTION PLAN

Detail the SMART actions the sponsoring organisation should take to ensure that project lessons are learned, shared and implemented to benefit future project delivery. Within the format suggested below, recommendations should be presented in order of priority, with the most important one listed first.>

* 1. Start

<As a result of the lessons learned, what should the sponsoring organisation **start** doing? What steps, actions or processes *didn’t* you do or follow in this project that, if implemented, would make future projects easier?>

* 1. Stop

<As a result of the lessons learned, what should the sponsoring organisation **stop** doing in future projects? There were, for example, decisions in this project that could have been made better; how will we ensure this happens?>

* 1. Continue

<As a result of the lessons learned, what should the sponsoring organisation **continue** doing? What did you do in this project that worked so well that it should be locked in as a practice in future projects?>

1. APPENDICES

This section is optional. Where necessary, appendices can be attached to provide any relevant supporting information, such as:

* a glossary listing key terms and abbreviations used in the Review
* a copy of survey or interview questions
* a de-identified summary of individual stakeholders comments gathered through the investigative process
* an index of project documents examined during the Review and links to them
* photos of the project in its various stages of performance
* relevant extracts from the project documents, and
* examples of tools or templates referred to within the Review

Do not append documents or information not referred to in the body of the Review.