



<<<Insert Name of Project>>>

Post Implementation Evaluation Report

June 2012



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Document Version Control

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Date	Version	Description	Author
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<<< Instructions to Author:

- Insert page breaks to ensure the document content is presented clearly;
- Add edits to indicate when tables are “Continued...” on a subsequent page;
- Review and remove all blue text;
- Update the Document Version Control table; and
- Update the Table of Contents that appears in this section. >>>

Purpose

A post implementation evaluation report (PIER) must be completed following the completion of an Information Technology (IT) project. Approval of a PIER terminates the project reporting requirements. This document provides instructions and reference for preparing a Post Implementation Evaluation Report (PIER) upon closure and implementation of an information technology project. The project manager (PM) will assist the customer preparation of the PIER and/or lessons learned document during the project closeout.

A Post Implementation Evaluation Report (PIER) documents the successes and failures of the project. It provides a historical record of the planned and actual budget and schedule. Other selected metrics on the project can also be collected, based upon state organization procedures. The report also contains recommendations for other projects of similar size and scope.



1. Project Background

Insert project background in this section. Include:

- Project name and abbreviation;*
- Project description including affected stakeholders and business conditions that led to the initiation of the project;*
- Indicate whether a BCP refresh/upgrade is involved;*
- Footnote Service Request numbers if applicable/available; and*
- Footnote the project number from sposhare.com if available.*

2. Project Document Repository

The Project PIER will be archived in the project document repository located at *<path or server>* upon completion.

Who Prepares the Report

The project manager typically has responsibility for preparing the report. The project manager gets input from the entire project team, the users, and other major stakeholders. People performing different functions on the project will have a different outlook on the successes and failures and on possible solutions. If every project member cannot be consulted, at least ensure that a representative from each major area of the project participates. The users' overall view of the project and its final product is also a major focus of the project. It is this view, along with the view of the major stakeholders that lives on after closure has been completed.

3. How well do the end users accept the product? Why?

4. How well does management accept the product? Why?

5. Product/System Use Review

Product	Observer	Date Observed	Product being used as designed	If not, why not	Impact	Action Required and Due Date



6. Attainment of Objectives

Provide a list of project objectives, if the objective was met and the benefit provided. Explain any corrective actions taken.

Objective	Outcome	Benefit Captured	Corrective Action (if needed)

7. Milestone Schedule

Provide a list of project objectives, if the objective was met and the benefit provided. Explain any corrective actions taken.

Milestone	Target Completion	Actual Completion	Reason for Variance

8. Project Costs

The PIER must contain a comparison of the projected costs contained in the last approved FSR or SPR and the actual costs of implementing and maintaining the completed IT project. Additionally, a comparison of the proposed cost savings must be measured against the actual cost savings.

The PIER Cost spreadsheet package provides the cost sheets required to document the necessary cost information. The worksheets are intended to compare the costs projected in the last approved project documents with the actual costs experienced during the implementation and maintenance of the IT project.

8.1 Last Approved

Enter projected costs, cost savings and increased revenue as identified in the last approved FSR or SPR.

8.2 Actual

Enter the actual costs, cost savings and increased revenues realized as a result of implementing and maintaining the project.

8.3 Comparison

Calculate variances between the approved costs to actual costs to determine the project earned value. Below is the link to the PIER Cost worksheets:

PM Toolkit

9. Lessons Learned

In addition to communicating the closure of a project in writing, it is also advisable to have a mechanism for group review. A “Lessons learned” session is a valuable closure and release mechanism for team members, regardless of the project’s success. Some typical questions to answer in such a session include:

Such a session provides official closure to a project. It also provides a forum for public praise and recognition or offers an opportunity to discuss ways to improve future processes and procedures.

Lesson Learned Activities

The lessons learned activity involves determining the causes of variances in performance, the reason behind corrective actions chosen, and project activities that worked well and those that did not. Lessons learned should be documented as part of the historical record for the current project and as a “best practice” reference for future projects. The lessons learned review should be conducted following completion of each major lifecycle phase. At a minimum, projects perform a lessons learned review at the end of each phase and at project completion.

Conducting Lessons Learned Sessions

The session provides a forum for public praise and recognition for project team members, allows the team to acknowledge what worked well, and offers an opportunity to discuss ways to improve processes and procedures.

Participants of a lessons learned session are typically the Project Manager and project team. It may also include the customer and/or external stakeholders as appropriate.

Some typical questions to answer include the following:

- In this process or sub process, what did we do well? What could we have changed?*
- Did the delivered product meet the specified requirements and goals of the project?*
- Was the customer satisfied with the end product?*
- Did the project stay within scope?*
- Were cost budgets met?*
- Was the schedule met?*

- *Were risks identified and mitigated?*
- *Were problems or issues resolved timely and adequately?*
- *Did all of the components of the project management methodology work? If not, which ones did not, and why?*
- *What could be done to improve the process?*

Documenting Lessons Learned Activities

Lessons Learned are captured and documented on the Lessons Learned Report template (Appendix A). At a minimum, projects should perform a lessons learned review at the end of each major lifecycle phase and at project completion. Finalized Lesson Learned Reports are then to be submitted to the California Technology Agency project management office.

Lessons learned are captured so they ultimately become part of a historical database for both the project and other OTech projects

Lessons Learned Report Instructions

Using the Lessons Learned template (Appendix A), enter the following information for each lesson learned under review.

Since problems or sensitive issues may be discussed in the PIER and Lessons Learned, it is helpful to have any organization identified as a contributor included in a review of the material prior to formally submitting the document. It is useful to have the reviews in an interactive forum where all parties can discuss their recommendations for improvement. The PIER can then present a complete view of the system.

Identifying and Addressing Success

Be certain that successes as well as problems on the project are identified in the PIER. Be certain to include new ideas that were very successful on the project. Make recommendations on how these processes might be adapted for other projects.

Share the project successes with other organizations in the state organization. In the same way that problem identification can lead to improvements, successes must be shared so they can be repeated.

Where possible, successes should be translated into procedures that will be followed by future projects.



10. Appendix A – Lessons Learned Report

Project Name	Enter Project Name	Date	Enter the Date (mm/dd/yy) Lessons Learned are recorded	
Project Lifecycle Information				
Project Lifecycle and Phases	<input type="checkbox"/> Project Management <input type="checkbox"/> Initiation <input type="checkbox"/> Project Closeout <input type="checkbox"/> System Termination	<input type="checkbox"/> Project Funding Approval <input type="checkbox"/> State Funding <input type="checkbox"/> State/Federal Funding <input type="checkbox"/> Product Acceptance	<input type="checkbox"/> Acquisition <input type="checkbox"/> Acquisition Planning <input type="checkbox"/> Contracting <input type="checkbox"/> Development	<input type="checkbox"/> System Development <input type="checkbox"/> Requirements Analysis <input type="checkbox"/> Design <input type="checkbox"/> Test <input type="checkbox"/> Implementation

Knowledge Area	Lesson Learned That Worked	What Worked Well Recommendation	Lesson Learned That Didn't Work	What Didn't Work Well Recommendation
Scope	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Time	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Cost	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Quality	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.



<Project Name>
Post Implementation Evaluation Report
 <Date>

Knowledge Area	Lesson Learned That Worked	What Worked Well Recommendation	Lesson Learned That Didn't Work	What Didn't Work Well Recommendation
Communication	1.	1.	1.	1.
	2.	2.	2.	2.
	3.	3.	3.	3.
Risk Management	1.	1.	1.	1.
	2.	2.	2.	2.
	3.	3.	3.	3.
Human Resources	1.	1.	1.	1.
	2.	2.	2.	2.
	3.	3.	3.	3.
Procurement	1.	1.	1.	1.
	2.	2.	2.	2.
	3.	3.	3.	3.