



<Insert Project Name>
**POST-IMPLEMENTATION EVALUATION
REPORT (PIER)**

<Insert Date>



<INSERT PROJECT NAME>
PIER

Document Revision History

<Insert the name, title, division acronym, and unit name for each person who assisted in the preparation of this document.>

Name: Title: Division: Unit:	Name: Title: Division: Unit:	Name: Title: Division: Unit:
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<Due to the nature of this deliverable, there may be the need for more than one version to account for significant changes in approach, stakeholders, or other organizational changes during the life of the project. Typically, the Project Manager, or designated team member, will develop the document with significant involvement from stakeholders who are participating in the delivery of the solution. Use the document revision table to identify who submitted the updates.>

Date	Version	Revision Description	Author



<INSERT PROJECT NAME>
PIER

TABLE OF CONTENTS

1. BACKGROUND AND SUMMARY OF RESULTS.....	4
2. ATTAINMENT OF OBJECTIVES.....	4
3. LESSONS LEARNED	5
4. CORRECTIVE ACTIONS	6
5. PROJECT MANAGEMENT SCHEDULE	6
6. ECONOMIC SUMMARY	8



<INSERT PROJECT NAME>
PIER

1. BACKGROUND AND SUMMARY OF RESULTS

< The PIER Instructions provide the following summary for completing this section: "Provide a brief summary of the project's history, objectives, and results. Topics to be discussed should include:

- 1 How the project was initiated;
- 2 How it progressed;
- 3 Problems that were encountered and how they were overcome;
- 4 User and management acceptance of the operational application;
- 5 How [CalPERS] management views the management of the project; and
- 6 How the application fits into [CalPERS]' overall management and operations strategy."

Much of this information is available from the Project Charter or Feasibility Special Report. Refer to these documents to pull information into the PIER as required.

The text below is sample text only, replace with information from your project.>

Inadequate customer service due to an ineffective Interactive Voice Response (IVR) system incited local agencies to elect commercial health providers rather than CalPERS for their health benefit providers.

The <insert project name> project replaced the CalPERS Health IVR with a state-of-the-art system that rivals the best available in commercial health and eliminates the incentive for local agencies to elect commercial health providers over CalPERS.

During the design phase of the project, IV&V reported that the system's business requirements were not sufficient for the design of a superior IVR in California as an independent analysis showed that the business requirements would lead only to a mediocre system. Consequently, the project was delayed for one month for a benchmarking study that led to a revised set of business requirements.

Now, one year into the IVR system's life, CalPERS management has declared the project a success and CalPERS customer service employee surveys show improved job satisfaction attributed to the new IVR. The IVR has helped CalPERS improve its market position and is expected to increase CalPERS health membership over the next two years.

2. ATTAINMENT OF OBJECTIVES

<Specific objectives are established during the initiation of the project and documented in the Project Charter, Scope Document, or Feasibility Study Report (FSR) for each project. Refer to these documents when creating this section. These objectives, which are normally defined in terms of measurable impact on [CalPERS] programs and resources, provide the baseline for measurement of the project's success. Accordingly, the narrative portion of this section of the PIER must describe the project outcome with respect to each objective included in the Project Charter, Scope document, FSR or last



<INSERT PROJECT NAME>
PIER

approved Special Project Report (SPR). This section must also include a clear statement regarding the capture of benefits and whether they were achieved as anticipated.”

The text below is sample text only, replace with information from your project.>

All IVR project objectives were accomplished as planned. The objectives of the <insert project name> project were to:

- 1 <Insert objectives here, samples are given below>
- 2 Complete an analysis on the current IVR system.
- 3 Perform a feasibility study, alternatives analysis, and cost / benefit analysis to determine the best IVR system out of the top three industry leaders.
- 4 Procure and implement the selected IVR.
- 5 Launch a marketing campaign to local agencies to promote the new IVR.

CalPERS Health membership was expected to grow by 5% in the first year of IVR operation and 10% for the following two years.

In the end, the IVR Project cost \$900,000. In the first year of operation, CalPERS Health membership has grown by 6%.

3. LESSONS LEARNED

< The PIER must contain a narrative of any lessons learned, best practices, notable occurrences, or factors that contributed to the project’s success or problems, or other information, which could be helpful during future project efforts.”

The Project Manager should have Lessons Learned for the project gathered during project closeout per the Lessons Learned Plan. This data can be repeated in this section or attached as an appendix to the PIER.>

Lessons learned were documented following the completion of each project phase as well as the completion of the project. The following table summarizes lessons learned as well as actions for improvement related to each lesson.

Lessons Learned

Lesson ID	Lesson	Action For Improvement
1	Technical management and project management plans were not compatible due to lack of coordination between development teams.	Technical management and project management plans undergo concurrent development with liaisons from each side supporting the other’s development. For example, the Software Development Manager will work with the PMO to create a Change Control Plan that supports the software development



<INSERT PROJECT NAME>
PIER

		methodology being used on the project.
3	<Summarize lesson learned from data gathering step.>	<Document action for improvement.>
4	<Summarize lesson learned from data gathering step.>	<Document action for improvement..>

4. CORRECTIVE ACTIONS

<This section must be included when the project is deemed to be a limited success or failure, or when there are significant differences between project expectations (as expressed in the Project Charter, Feasibility Study Report, Project Definition Document, or last approved Special Project Report) and project results. If the project was a limited success or involved significant differences between expectations and results, alternatives for improving the outcome must be summarized. If the project was a failure, alternatives for addressing the problem or opportunity that still presents itself must be summarized.>

The text below is sample text only and should be replaced by information specific to your project.>

The one-month delay in the IVR project due to business requirement re-definition is attributed to insufficient market analysis during the initial creation of business requirements. As highlighted by the June 2003 IV&V Quarterly Report, the consultant hired by CalPERS to develop the business requirements used focus groups as a market analysis technique in order to generate the business requirements. The consultant failed to do a detailed competitive analysis to determine what business requirements could be used to differentiate CalPERS health from the market leaders. Hence, a benchmarking study was conducted that compared the initial business requirements to the market leader’s IVR systems. Based on this benchmarking, the business requirements were upgraded to prescribe a higher quality system than that of competitors.

5. PROJECT MANAGEMENT SCHEDULE

<Provide a revised Project Management Schedule showing targeted and actual completion dates for major accomplishments/milestones during the project. Any significant deviations from the original schedule must be explained in the narrative. The text below is sample text only and should be replaced by information specific to your project.>

The IVR project missed the target completion date by 30 days due to business requirement re-definition.



<INSERT PROJECT NAME>
PIER

Milestone	Deliverable or Work Product	Description	Target Completion Date	Actual Completion Date
Day 30	Vendor Qualifications	The three top vendors in the U.S. IVR industry will be selected and qualified as bidders for the project.	September 30, 2003	September 30, 2003
Day 45	Vendor Demonstrations	The vendor demonstrations will be completed and evaluated by a team of evaluators per an objective scoring matrix.	October 15, 2003	October 15, 2003
Day 60	Feasibility Study	The Feasibility Study will document the comparison of alternatives and costs / benefits of the alternatives and chosen solution and provide a conclusive recommendation for best-of-breed IVR solution.	October 31, 2003	October 31, 2003
Day 120	IVR System	The selected vendor designs and builds the IVR and assists CalPERS in going "live" with the operational system.	December 31, 2003	January 31, 2004
Day 150	IVR System Marketed	Marketing vendor completes advertising and public relations campaign	January 31, 2004	February 28, 2004



<INSERT PROJECT NAME>
PIER

6. ECONOMIC SUMMARY

<The PIER Instructions outline the following summary for completing this section: “The PIER must contain a comparison of the projected costs contained in the last approved Project Charter, Feasibility Study Report (FSR), or Special Project Report (SPR) and the actual costs of implementing and maintaining the completed project. Additionally, a comparison of the proposed cost savings must be measured against the actual cost savings [and Return on Investment]>.

- 1 Last Approved Costs – Document the projected costs, cost savings and increased revenues as identified in the last approved project charter, FSR, or SPR.*
- 2 Actual Costs – Document the actual costs, cost savings and increased revenues realized as a result of implementing and maintaining the project.*
- 3 Cost Comparison - Indicate the cost savings or overages associated with the implementation and maintenance of the project.*

The total cost of the IVR Project was estimated to be \$1,000,000. The actual cost of the project was \$1,200,000. Revenues due to increased CalPERS health membership have grown by 5% (\$4,500,000) in the first operational year of the system.