**Project Lessons Learned Report**

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| **Project Name:** | Sample8 Project |
| **Prepared By:** | P Spice |
| **Date** | 2/8/2019 |

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| **Project Close-Out Discussions** | | | | |
| A lessons learned meeting was held on 2/8/2019 and the initial summary is attached herewith. | | | | |
| **Project Team:** | | | S Marcum, R Flores, J Bent, I Clabby, F Mitch, K Ashley, H Foster | |
| **Project Background:** | | |  | |
| **I. Project’s biggest successes:** | | | | |
| ***Description*** | | | ***Factors that promoted this success*** | |
|  | Tool is capable of both simple and complex forms. | | We tested a variety of forms in both the Phase 1 pilot and the Phase 2 Service Rollout. | |
|  | Handles API integrations allowing robust data integrations | | Tested APIs, asked for multiple API lookups on each form which was implemented. | |
|  | Workflows / approvals process in NG Dynamic Forms is understood | | Tested a variety of workflow scenarios. | |
|  | Forms are user-friendly | | Layout, API integration, Workflows all increase form usability. | |
|  | Vendor is very open to feature requests | | Flexible approach to product development by vendor. | |
|  | Platform is very affordable | | Good RFP process | |
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| **II. Areas of potential improvement along with high-impact improvement strategies:** | | | | |
|  | ***Category*** | ***Project Shortcomings*** | | ***Lessons learned*** |
| 1 | Schedule over-runs | Balance needs of business with commitment to project timelines | | Escalate better. Make more realistic scheduling decisions. Be honest about workload and how much can be accomplished over coming months. |
| 2. | Business Sponsor | Sponsor change, BPI group shut down, change in HR leadership during project. | | Navigate organizational changes better. Steering Committee might have mitigated a lot of this uncertainty and indecision. |
| 3. | Requirements | Needed a better defined set of requirements. HR Functional Lead also left near completion of first draft of form. | | Each form needed a better set of requirements so that the forms could be tested and approved more efficiently. If we had done a better job documenting functional requirements, losing the functional lead would not have slowed us down as much. |