# General Information

|  |  |
| --- | --- |
| **Project Name/Project #:** |  |
| **Business Process Owner/Sponsor:** |  |
| **Author:** |  |
| **Project End Date:** |  |

# Revision / Change History

|  |  |  |
| --- | --- | --- |
| **Revision Level** | **Revision Date** | **Description of Changes** |
| 01 | 4/28/11 | 1. Template Version |
| 01 |  | 1. Initial Project Version |

***The purpose of the Project Assessment is to document the overall project including how it was managed, how it was delivered and overall team and customer satisfaction. It should serve as key information for future projects and allow for the continuous improvement of the project management practices and procedures.***

***The intended audiences for the Project Assessment are the project sponsor, the project manager, Project Management Office, and all project team members. The complexity of the Project Assessment should reflect the complexity of the project.***

Note: After completing this document you should:

* + - * Refresh the table of contents by doing the following: Right click anywhere in the TOC > Click ‘Update Field’ > Click ‘Update entire table’ > click OK.
      * Remove all Instructions by doing the following: Select a section of Instructions > Right Click > Select ‘Styles” > Select ‘Select Text with Similar Formatting’ > Press ‘Delete’

Contents

[General Information 1](#_Toc285437484)

[Revision / Change History 1](#_Toc285437485)

[1 Milestones 1](#_Toc285437486)

[2 Variances 1](#_Toc285437487)

[2.1 Schedule 1](#_Toc285437488)

[2.2 Cost 2](#_Toc285437489)

[3 Issues, Action Items and Handoffs 2](#_Toc285437490)

[4 Change Requests 2](#_Toc285437491)

[5 Benefits 3](#_Toc285437492)

[6 Lessons Learned 3](#_Toc285437493)

[6.1 What Went Well 3](#_Toc285437494)

[6.2 What Did Not Go Well? 3](#_Toc285437495)

[6.3 What Could be Done to Improve on Future Projects? 3](#_Toc285437496)

[7 Final Checklist 4](#_Toc285437497)

[8 Acknowledgement 4](#_Toc285437498)

1. Milestones

This should include all major milestones and comments on the delivery of each milestone (schedule, cost, quality, issues. A milestone is a significant event within the project which is used for tracking and coordination. Make sure to also indicate the source of any comments. You may also attach a schedule that includes the milestones and deliverables.

|  |  |  |  |
| --- | --- | --- | --- |
| **Milestone** | **Key Deliverables** | **Responsible** | **Comments** |
|  |  |  |  |
|  |  |  |  |

1. Variances

## Schedule

The schedule variance should be the approved and baselined schedule (original baseline completion date plus any change requests) less the actual completion date.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Start Date** | **Scheduled Completion Date** | **Actual Completion Date** | **Total Days (Start – Actual)** | **Variance – Days (+/-) (Schedule - Actual** |
|  |  |  |  |  |
| **Reason(s) for Variance** |  | | | |

## Cost

The cost variance should be the approved and baselined budget (original baseline plus any change requests) less the actual cost.

|  |  |  |  |
| --- | --- | --- | --- |
| **Budgeted Cost** | | **Actual Cost** | **Variance - $ (+/-) (Budget – Actual)** |
|  | |  |  |
| **Reason(s) for Variance** |  | | |

1. Issues, Action Items and Handoffs

Open Issues and Action Items must be assigned and operationalized at the end of the project. All handoffs required should also be captured. You may also attach a report prepared from the project management tool being used (for example: Clarity).

|  |  |
| --- | --- |
| **# Issues Remaining** |  |
| **Issue** | | **Owner** |
|  | |  |
|  | |  |

|  |  |
| --- | --- |
| **Action Item** | **Owner** |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **Handoff** | **Owner** |
|  |  |
|  |  |

1. Change Requests

Quantify the project change requests and their impact and describe the major change requests.

|  |  |
| --- | --- |
| **Project Schedule impact of Change Requests - Days (+/-)** |  |
| **Project Cost impact of Change Requests - $ (+/-)** |  |
| **Major Change Requests** | | **Reason** |
|  | |  |
|  | |  |

1. Benefits

*Benefits as identified in the Project Charter should be given to an ongoing owner to determine if/when they are realized and to what extent.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Benefit** | **Benefit Owner** | **When Will Benefit be Realized** | **How Measured and Reported** |
|  |  |  |  |

1. Lessons Learned

For each of the critical project success factors identified below, the project team should rank the project on a scale of 1 to 5. The project manager may use the compiled surveys for this information or may use a team meeting to collect this information. The PMO may be used to help facilitate this.

1-Poor, 2-Fair, 3-Good, 4-Very Good, 5-Excellent

|  |  |
| --- | --- |
| **Factor** | **Rating** |
| **User Involvement** |  |
| **Executive Management Support** |  |
| **Clear Statement of Requirements** |  |
| **Proper Planning** |  |
| **Realistic Expectations** |  |
| **Smaller Project Milestones** |  |
| **Competent Staff** |  |
| **Team Accountability and Ownership** |  |
| **Clear Vision and Objectives** |  |
| **Hard Working and Focused Staff** |  |

For each of the project constraints identified below, the project team should rank the project on a scale of 1 to 5. The project manager may use the compiled surveys for this information or may use a team meeting to collect this information. The PMO may be used to help facilitate this.

1-Poor, 2-Fair, 3-Good, 4-Very Good, 5-Excellent

|  |  |
| --- | --- |
| **Constraint** | **Rating** |
| **Scope** |  |
| **Cost** |  |
| **Schedule** |  |
| **Quality** |  |

## What Went Well

## What Did Not Go Well?

## What Could be Done to Improve on Future Projects?

1. Final Checklist

For each of the items in the checklist indicate if the item is satisfied (Total), partially satisfied (Partial) or Not Applicable (N/A).

|  |  |  |
| --- | --- | --- |
| **Checklist** | **Total, Partial, N/A** | **Comments** |
| Goals and Objectives Met |  |  |
| Deliverables Accepted |  |  |
| Troux APM Update Complete |  |  |
| System and Help Desk Support in Place |  |  |
| Disaster Recovery Plan Complete and Approved |  |  |
| All Resources Released |  |  |
| All Expected Costs Applied |  |  |
| SOX Controls in Place |  |  |
| Project Documentation Archived |  |  |

1. Acknowledgement

Actual acknowledgement may be in electronic format but authorized stakeholders for this document should be named here. This is an acknowledgement of the assessment herein and that the project is officially closed.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Role** | **Acknowledgement** | **Date** | **Comments** |
|  | Project Manager |  |  |  |
|  | Project Sponsor |  |  |  |
|  |  |  |  |  |