The following areas should be discussed with the Project Sponsor, ideally in a one on one conversation and documented by the project manager. In cases where that is not possible, the following survey can be used.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Area** | **Highly Effective** | **Effective** | **Partially Effective** | **Ineffective** |
| **Objectives** | Desired goals of the project were attainable, communicated clearly to the project team and were aligned to the corporate objectives. | Desired goals of the project were attainable and communicated clearly to the project team. | Broader focuses of the goals were communicated to the project team | Vague and sometimes unattainable goals were communicated to the project team. |
| **Organization** | A complete and accurate description of the roles, responsibilities, and reporting structure of the project organization were defined and communicated to the project team. | A clear vision of the roles, responsibilities, and reporting structure of the project organization were defined. | A portion of the roles, responsibilities, and reporting structure were defined for the project team. | The roles, responsibilities, and reporting structure were not clearly defined for the project team. |
| **Project Visibility** | The schedule, milestones and status of the project were accurately maintained and regularly communicated and team members understood their roles and were able to anticipate changes in the project. | There was regular communication of the schedule, milestones, and status of the project and team members understood their roles but changes to the plan were not easily anticipated. | There were project schedule, milestone and status updates on a regular basis but there was some difficulty understanding the impacts. | There was unclear or non-existent communication of schedule, milestones and status and team members could often not tell if they were needed until the last moment. |
| **Issue Management** | Issues were identified, logged, assigned to owners and corrected before they could impact the project schedule. | Most issues were identified and monitored and for the most part were corrected without impacting the project schedule | Most issues were identified but were not adequately managed and some impacted the project schedule. | Issues were identified and managed only after they became a crisis or changes were made to the project without the sponsor’s knowledge. |
| **Change Management** | All changes to the project were logged, assessed and approved prior to being worked on and implemented. | All changes to the project were logged and approved prior to being worked on and implemented, but impact assessments may not have been done. | Most changes to the project were logged and approved prior to being worked on and implemented but impact assessments may not have been regularly done. | Changes were not regularly tracked or recorded and were often made to the project without assessment or approval. |
| **Costs and Benefits** | Project costs and benefits were identified, measurable and controlled and the project was able to attain these agreed upon costs and benefits goals. | Project costs and benefits were identified, measurable, and controlled. | Project costs and benefits were identified and measurable. | The project costs and benefits were not identified. |
| **Quality Assurance and Acceptance Criteria** | The project/deliverable(s) exceeded my expectations. | The project/deliverable(s) met my expectations. | The project/deliverable(s) only partially satisfied my expectations. | Quality was never discussed and my expectations were not fully met. |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Factor* | *Poor* | *Fair* | *Good* | *Very Good* | *Excellent* | *Comments* |
| **Critical Success Factors** |  |  |  |  |  |  |
| 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 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **Project Constraints** |  |  |  |  |  |  |
| Scope |  |  |  |  |  |  |
| Cost |  |  |  |  |  |  |
| Schedule |  |  |  |  |  |  |
| Quality |  |  |  |  |  |  |

Describe the items that went well for the project:

Describe any overall suggestions for improvement to the process, procedures, and tools of the project: