

[Project Name] Post-Mortem

[name]

Performance Against Goals

- Goal: state original goal or goals of project
 - List key metrics (items for measuring success)
- Actual: summarize what really happened in relationship to goals
 - List progress against metrics

Performance Against Schedule

- Plan: summarize original schedule of project
 - List key milestones
- Actual: summarize what really happened in relationship to plan
 - List differences in terms of original dates (x weeks late, x months early, etc.)

Performance Against Quality

- Quality goal: state original quality goal or goals for the project
 - List key metrics (items for measuring success)
- Actual: summarize what really happened in relationship to quality goals
 - List progress against metrics

Performance Against Budget

- Budget: state original quality goal or goals for the project
 - List key cost goals, expenditure limits
- Actual cost/expenditures: summarize what really happened in relationship to budget
 - List progress against goals & limits

Post-Mortem By Department

Project Planning

How Was the Project Planned?

- Who was responsible for original plans?
 - How did that work? Right set of people?
- Was project well defined from beginning?
 - Was there an actual written plan?
 - How was project plan communicated?
 - How well did that work?

Project Planning Was the Plan the Right One?

- Was the plan a good one?
 - What was good? What was missing?
- Was the plan realistic?
- How did the plan evolve over time?
 - Was the change good or bad?
 - How did the changes affect the project?
- Key areas for improvement:
 - Make very specific recommendations.

Research & Development

How Was R&D Managed?

- How was the project managed through R&D?
 - How many teams, number of people, reporting structure, etc.
 - How well did that work? Improvements?
- How did the R&D teams communicate
 - What methods, timing, etc.
 - How well did that work?

Research & Development How Effective & Efficient Was R&D?

- Identifying & solving technical problems
 - Were issues identified early enough?
 - Were problems solved well?
 - What worked? Didn't work? Could be better?
- Estimates & execution
 - Were estimates on track with actuals?
 - What helped people estimate well?
 - What caused people to estimate poorly?

Project Management

How Was the Project Managed?

- Meetings: who/when/how often
 - How well did this work?
- Communication: who/when/how often
 - How well did this work?
- Changes: how tracked, communicated
 - How well did this work?
- Other methods: email, schedules, databases, reports, etc.

Manufacturing

- Was team properly prepared to receive product?
 - BOM & paperwork complete & accurate?
 - Materials ordered & ready?
- Did product meet manufacturability goals?
- Were there unexpected delays or problems?

Quality Assurance & Support

- How was product quality measured?
 - Was this effective? Efficient?
- How did final product compare against quality goals?
- How were quality issues resolved?
- Were support teams properly prepared?
- Is product quality consistent with support resources?

Marketing

- Did positioning match final product?
- Was positioning successful?
Appropriate? Effective?
- Was product launch effective?
- Were marketing programs effectively implemented?
- Did product & launch meet marketing goals?

Sales

- Was channel & sales force appropriately informed about product?
- Did product and message meet customer need?
- Was timing appropriate? Cost?
- How do initial sales compare to goals?
- How has product been received?



Key Lessons

What Went Right

- Summarize in quick bullet points specific things that worked well
 - Use specific examples: “daily 15-minute morning status meetings worked well” instead of “team communicated well”.
 - Distribute or list network location of forms, procedures, reports, etc. that were found to be particularly useful.

What Went Wrong

- Summarize in quick bullet points specific things that caused problems
 - Try to isolate specific attitudes, procedures, methods, timing issues, etc. that caused problems
- How did team respond to problems?

Recommendations

- By department or management level, record critical recommendations for future products of this type
- Distribute document or network location of more detailed summary of this presentation

Questions & Comments
