PROJECT PERFECT
Pty Ltd

Project Implementation Review (PIR) User Guide

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Document History

Version	Author	Date	Changes
0.1	Neville Turbit	1 Feb 09	First draft

Overview

Purpose of this Document	The purpose of this document is to outline how a PIR should be carried out after a project is completed.
PIR Definition	Project Review is a formal evaluation of the achievements of an overall project, not just one phase. It is: • Carried out by a senior, independent person • Intended to identify performance information • Allow improved estimation of future projects; • Evaluate tools, methods and technologies • Identify good and bad practices • Provide tips for future project participants.
Purpose of a PIR	The purpose of a PIR is to identify lessons learned on a particular project that can be applied to future projects. It may also provide an opportunity to identify outstanding work, and assign that work, at the time the Project Team is being disbanded.
Timing	A project review should be conducted one to six weeks after implementation is complete. This is early enough to apply any lessons but not so late that the relevance is diminished.
Carried out By	The Project Management Office normally carries out the PIR. If your organisation does not have a PMO you might employ an External Consultant. This provides a degree of impartiality and removes bias from the findings. Even if there is a PMO, it could be worth considering a review by someone who was at arms length to the project.
Major Sections	There are three major parts to a PIR. The inclusion of each section will be dependent on the project. Reasons for including or excluding the sections are listed below. The sections are: • Quantitative results of the project gathered through a survey • Qualitative results gathered through interviews and/or workshops • Work outstanding from the PIR and the assignment of that work

Benefits/Limitations of Quantitative and Qualitative Approach

Quantitative v Qualitative

Ideally both approaches should be used in a project. The quantitative approach should be common across all projects to provide some comparison. There should be a standard set of questions for all projects, and the opportunity to add more questions that are specific to each project.

- Quantitative assessment is good for telling you what happened.
- Qualitative is better for telling you what should have happened.

Reasons for Quantitative Results

Quantitative results are useful for the following reasons:

- They are easy to gather
- They provide some comparison between the same aspects of different projects (e.g. you can compare the effectiveness of communication between projects).
- They can focus on very specific aspects of the project

Limitations of Quantitative Results

Quantitative results have the following limitations.

- Given the small numbers of people surveyed in some projects, this should be treated with caution. They may not be statistically sound.
- You will only get the answers to the questions you ask. If there were other key issues in a project, they can be overlooked in a questionnaire.

Reason for Qualitative Results

Qualitative results are useful for the following reasons:

- They can raise issues that the person carrying out the interview may not initially be aware of
- Each interview can build on information from previous interviews
- Differences of opinion can be explored
- Good for identifying perception as well as reality

Limitations of Qualitative Results

Qualitative results have the following limitations:

- Sometimes it is difficult to separate fact from opinion
- No statistical basis for comparison between projects
- It takes longer to complete
- The more people you talk to, the more want to be involved

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Benefits/Limitations of Quantitative and Qualitative Approach, Continued

Conclusion	Both approaches have their pluses and minuses. If both are being used, it is useful to do the quantitative work first. The quantitative work will highlight topics that should be covered in the qualitative work. If the time available is an issue, you can expect to spend five to ten times more time to do the qualitative work than the quantitative work.

Benefits/Limitations of Interviews and Workshops

Individual Interviews v Workshops	In carrying out qualitative assessment, there is the option to use a one-on-one interview or hold a workshop with several people. Neither is the correct solution. The pros and cons are listed below.
Benefits of Individual Interview	Individual Interviews have the following benefits: • Usually the people will be more open in their comments • Issues of particular concern are more likely to come out
Limitations of Individual Interview	Individual Interviews have the following limitations • It takes a long time • Hard to identify what is reality and what is opinion • May need to go back to previous interviewees and verify information • Sometimes difficult to know who to talk to first
Benefits of Workshops	Workshops have the following benefits: • Can cover more people and get a broader view • Takes less time to complete the PIR
Limitations of Workshops	Workshops have the following limitations: • "Group Think". Everyone driven in a particular direction and dissenting opinions not expressed. • Can become an exercise in letting off steam about particular issues • People defer to the senior person in the group who may have a different experience to others • People don't want to upset other people in the group and don't raise issues
Conclusion	There is no correct answer. Sometimes a mix of both approaches is the best solution. If you do have to mix the approach, focus on individual interviews with people: • Who were key players • Who may not contribute in a workshop situation. Run workshops of groups of people who played a similar role e.g. Business Users, Testers, Developers.

Work Outstanding

Overview

If it has not been done already, it is important that the PIR captures the work outstanding. In fact the gap between handover and a PIR starting may result in work that was not passed to Production Support being uncovered. At the point a PIR is being carried out, the Project Team is usually disbanded or disbanding and there is the risk that work will be left outstanding. It is important that the work outstanding is identified and assigned.

In addition to this outstanding work, there will be action items coming out of the PIR that need to be completed. A difficulty facing any PIR is who will act on recommendations from the report.

Logging the Work

Identify the work at a high level. It is not necessary to draw up a specification however it is useful to identify if the work is considered part of the project, or is part of ongoing maintenance and enhancements.

As work is usually being completed on a daily basis, the items outstanding are likely to change daily. Consequently, the list of work outstanding will need to be updated regularly.

Project v non-project work

Often there is blurring of work required between what was part of the original scope, and what is additional scope. The Sponsor may need to decide where the work sits, as it may have an impact on project cost and the timing of the team being disbanded.

Template

An example of the template - "Work Outstanding" - is included in the appendix. If a PIR Report is being prepared, a current version of the template should be included as an appendix to the report.

Topics to be Covered

Overview	The topics to be covered will depend largely on the project. Each project will have a different list. The questions to be answered are: • How the project was managed • How successful was the implementation • How well did the solution meet the customer needs
Questions to Ask	Attached is a "Checklist of Typical Questions for a PIR" (Appendix A) that might be asked in a PIR. These will provide 70% to 80% of the topics that will need to be addressed.
Project Team Survey	A quantitative survey form is available in Microsoft Excel. It lists two pages of standard questions. Other questions may be added for the specific project. A copy of the form - "Project Team Survey" - is attached as Appendix B.
Business Satisfaction Survey	The "Project Team Survey" is primarily intended for Project Team members. If the intention is to survey business acceptance and satisfaction amongst people who were not involved in the project, a different questionnaire should be used - The "Business Satisfaction Survey". The questions are qualitative - no statistics can be established. This is intended as a replacement for an interview/workshop approach to the PIR, which may be applicable to smaller projects. A blank "Business Satisfaction Survey" is included as Appendix C

Scalability

Project Size

Your organisation may have a process for determining project size or you may have to guess. As a rough guide

- Small – less than one month
- Medium – one to six months
- Large – six to twelve months
- Very Large – over twelve months

The type will determine the level of detail and particular activities to be undertaken during the PIR Process.

Guidelines

The following guidelines are an indication of what might be appropriate for each size of project.

	Small	Medium	Large	Very Large
Project Team Survey Form	Yes	Yes	Yes	Yes
Business Satisfaction Survey Form	Yes	Yes		
Interviews/Workshops			Yes	Yes

Roles & Responsibilities

Roles & Responsibilities

The following table sets out the basic PIR responsibilities for the main roles in a project.

Role	Responsibilities
Sponsor	• Commissions the PIR • Participates in interviews/workshops/surveys
Key Business Manager(s)	• Participates in interviews/workshops/surveys • Receives a copy of the report
Project Manager	• Liaise with the Project Office/External Consultant • Participates in interviews/workshops/surveys • Receives a copy of the report
Project Team	• Participates in interviews/workshops/surveys
Project Office and/or External Consultant	• Carry out the PIR • Prepare the report • Brief the key participants • Identify Action Items to implement recommendations • Assign the action items • Monitor completion

Tools & Techniques

Tools & Techniques

A number of tools and techniques are available to assist with PIR. The following table sets out those available for use in this process

Tools & Techniques	Description
Checklist - Typical Questions for a PIR	A checklist of questions that could be asked during a PIR
Project Team Survey Template	A survey form which provides quantitative data on the management of the project
Business Satisfaction Survey Template	A survey form that provides qualitative data on how satisfied the business is with the deliverables.
Work Outstanding Template	Template to record work outstanding
PIR Report Template	Template to record the results of the PIR