

What?

A Post-Implementation Review (PIR) is an assessment and review of the completed working solution. It will be performed after a period of live running, some time after the project is completed.

There are three purposes for a Post-Implementation Review:

1. To ascertain the degree of success from the project, in particular, the extent to which it met its objectives, delivered planned levels of benefit, and addressed the specific requirements as originally defined.
2. To examine the efficacy of all elements of the working business solution to see if further improvements can be made to optimise the benefit delivered.
3. To learn lessons from this project, lessons which can be used by the team members and by the organisation to improve future project work and solutions.

In some cases, the first of these objectives can be a contractual issue. Where that is the case, it may be safer to run separate reviews - one focused on contractual compliance and the other seeking to derive further benefit from a no-blame review.

When?

A Post-Implementation Review should be scheduled some time after the solution has been deployed. Typical periods range from 6 weeks to 6 months, depending on the type of solution and its environment.

The PIR is intended to be an assessment and review of the final working solution. There should have been at least one full processing and reporting cycle completed. It should not be performed while the initial snags are still being dealt with or while users are still being trained, coached and generally getting used to its operation.

The PIR should be timed to allow the final improvements to be made in order to generate optimum benefit from the solution. There is no point in waiting too long as the results are intended to generate that final benefit for the organisation and team.

Who?

There is often a difference of opinion as to who should perform the Post-Implementation Review. Usually, members of the project team will want to complete the review as a natural extension of their responsibility to deliver optimum benefit from the solution. They understand what was required, what was changed, how it was achieved, how things are supposed to work, how to fix problems, etc.

There is a converse argument that an independent team should perform the review. This reduces the risk that any errors or omissions of the project team might equally be overlooked in their review.

A solution is to do both. An independent audit team, working in consultation with the business users and project team, could examine whether the results are satisfactory. The project team might then reconvene to consider that input and also to examine how to generate further value from the solution.

How?

A list of points should be drawn up to cover all elements of the operational solution. They should include such things as:

Current situation

- Is the required functionality available?
- Are the procedures properly documented, published and known about?
- Have users received adequate training and coaching to take advantage of the new facilities?
- Are staffing levels and skill sets appropriate for the actual workloads?
- Are staff displaying appropriate attitudes to get the best out of the system (confidence in its capabilities, belief in its purpose, willingness to make it work, etc)?
- How busy, usable, useful and adequate are support services such as the systems support function and help desk?
- Are third parties such as customers and suppliers satisfied with the service?
- Is the level and nature of identified faults acceptable?
- Are faults handled at an acceptable speed and with satisfactory results?
- Is data integrity being maintained within the system and in relation to other integrated or interfaced systems?
- Are systems controls being applied correctly?
- Are business, procedural and financial controls being applied correctly?
- Does the system and its usage meet current legal and regulatory requirements?
- Is the system able to process transactions at an adequate speed?
- Does the system have the capacity to deal with the actual peak loadings as encountered and foreseen?
- Are staff following operational procedures including backup, recovery, security and disaster recovery?
- Has the project been properly demobilised, eg documentation filed, team members appraised and reassigned, equipment and facilities returned, final accounting and reporting completed, success and completion communicated?

Benefits

- What were the final costs of the project?
- What is the actual operating cost of the new solution?
- What is the actual benefit being delivered by the new solution?
- How does that compare to the original project definition?

Future improvements

- Could further training or coaching improve the degree of benefit being generated?
- Are there further functional improvements or changes that would deliver greater benefit?
- Are specific improvements required in procedures, documentation, support, etc?
- What learning points are there for future projects?

These questions will be investigated through a combination of investigative techniques including interviews, examination of documentation, performance statistics, hands-on tests and checks, etc. Implications and potential remedial options

would then be assessed and evaluated. The findings and recommended actions would be prepared, normally in the form of a report or presentation.

Next Steps

The findings and recommendations will be presented to:

- The solution's business owners,
- The leading participants in the project, and other parties who may be concerned with the results.

Specific actions should be proposed to address any further work that is recommended. This might be handled in several different ways, for example:

- As routine support and maintenance,
- As remedial work to be performed by the original project team,
- For line management to address through user education and procedures etc,
- As further phases of development involving new projects.

Example Outline for a Post Implementation Review

1. Purpose of Post-Implementation Review

Why is this Post-Implementation Review being conducted?

2. Summary of Project Being Reviewed

Describe the project that is being reviewed

3. Project History

Briefly describe the project history; why the project was undertaken, expected benefits, etc.

4. Project Objectives

What, specifically, was the project supposed to accomplish? (e.g. reduce maintenance costs by 15%, improved operator interface, improve system response time by 20%, etc.)

5. Project Status

As of the post-implementation review, what is the status of the project? Is it complete? Are there outstanding issues? Is it on time and within budget?

6. Software Evaluation

Summarize an evaluation of the software. This is particularly applicable if a package is being reviewed, but should also be used for custom built applications or any combination thereof. Include a review of specific issues pertaining to the software and any benefits that were derived specifically from implementing the software. Software can be reviewed on fit (does it meet the requirements – process and technical?), form (is it user-friendly?) and function (does it do what needs to be done correctly, efficiently and effectively?).

7. Hardware and Network Performance

Summarize an evaluation of the hardware and network performance, including any major issues arising during the project or still outstanding and benefits. This may include: desktop computers, laptops, printers, network connections, dial-up connections, servers, and scanners.

8. System Setup and Administration

Summarize an evaluation of how the system is set up, or configured, and administration, such as how system changes, security and system backups will be managed. Describe any outstanding issues.

9. Training

Summarize a review of how users and administrators were trained on the system. A more detailed review should be captured at the time of training to get students' input into the training program itself. Are there any outstanding training issues? Is there a plan in place for ongoing training?

10. Software Integration

If this project included integrating the new system into other business or HSE systems, how did this work? Is the integration seamless? Will the integration be easily maintained in future releases of the system? Was there value added because of the integration? Did the integration help eliminate inefficiencies?

11. System Performance Against Project Objectives

How does the system perform against the project's objectives described in #4?

12. Areas of Improvement

Identify areas of the system – processes, hardware, software, network components, etc. that, after review, still require improvement.

13. Cost Assessment

How did the project perform in terms of costs and expected benefits and savings? How did the project perform against initial budget estimates?

14. Lessons Learned

What lessons could be taken from this project and brought forward into other projects to maintain continuous improvement? How should this information be communicated so that it is not lost going forward?

15. Project Performance Against Corporate Objectives

How did this project perform against relevant corporate objectives? Are there specified ROI hurdles? Does it meet high-level objectives for the corporation?

16. Project Performance Against Information Technology Strategy

How did this project perform against the information technology strategy of the company? Was the project in line with where the information technology for the corporation is heading?

17. Project Performance Against Environmental Management Strategy

How did this project perform against the environmental or HSE strategy of the company? Does the system support the strategy? Are there any issues?

18. Views at Other Benchmark Companies

If the Post-Implementation Review is being conducted against purchased software, an external benchmark should have been conducted sometime before or right after the

software purchase with other companies that implemented the software. The benchmark should have revealed expectations that must be revisited during the Post-Implementation Review. If a benchmarked company was able to achieve specific savings and performance results, did you also expect to achieve similar savings and performance results? Now that the system is implemented, are you getting those expected results?

19. Software Company's Commitment to the Product (for purchased software)

If the project included purchased software, summarize an evaluation of the software company's commitment to the HSE-MIS product. Has the company's status with the product changed during the implementation period (i.e. company buy-out, upgrades on time, promises kept)? Is there any concern about long-term support that needs to be addressed at this time? Did you get the support and expertise you expected during the project? Be sure to include recommendations.

20. Project Management Evaluation

How did the project team perform? Did the project management team help the success of the project or contribute to its failure? Were issues addressed in a timely fashion? Was a communication plan set in place and followed? Did HSE and MIS manage as a team effectively? Could improvements be made for the next project? The assessment should include an evaluation of any external help you employed for the project, such as an HSE-MIS consultant and software vendor (if they were part of the project management team).

21. Benefits Assessment

Identify specific benefits, both tangible and intangible. Were there clear benefits? Did they match against initial expectations?

22. Next Steps for Project

Identify a plan for the outstanding issues that must be addressed for the project. Are there next steps for the system, such as upgrades or an implementation at another facility?