**Evaluation**

There are many different ways to evaluate a change initiative. One such way would be to carry out a Post Implementation Review (PIR).

**When to Review**A good time to start thinking about the PIR is when members of the project team remember the most – shortly after the project has been delivered, and when most of the problems have been ironed-out. Start to list ideas and observations while they are still fresh in people's minds.However, to adequately assess the quality of the implementation and complete this process, you'll need to wait long enough for the change to truly take effect. You should therefore typically allow a few weeks, or even a few months, before doing the full PIR. Where possible, allow for at least one, full, successful cycle of business before reviewing lessons learned.

**What to Review**

Here are some tips for conducting the PIR:

* **Ask for openness** – Emphasise the importance of being open and honest in your assessment, and make sure that people aren't in any way punished for being open.
* **Be objective** – Describe what has happened in objective terms, and then focus on improvements.
* **Document success** – Document practices and procedures that led to project successes, and make recommendations for applying them to similar future projects.
* **Look with hindsight** – Pay attention to the "unknowns" that may have increased implementation risks. Develop a way of looking out for these in future projects.
* **Be future-focused** – Remember; the purpose is to focus on the future, not to assign blame for what happened in the past. This is not the time to focus on any one person or team.
* **Look at both positives and negatives** – Identify positive as well as negative lessons.

When conducting the review, include the following activities:

* **Conduct a gap analysis.**
  + Review what you first identified as the measures of success to evaluate how closely the project results match the original objectives.
  + Review the expected deliverables (including documentation) and ensure either that these have been delivered to an acceptable level of quality, or that an acceptable substitute is in place.
  + If there are gaps, how will these be closed?
* **Determine whether the project goals were achieved.**
* Is the deliverable functioning as expected?
* Are error rates low enough, and is it fit for purpose?
* Is it functioning well, and in a way that will adjust smoothly to future operating demands?
* Are users adequately trained and supported? And are there sufficiently enough confident, skilled people in place?
* Are the necessary controls and systems in place, and are they working properly?
* What routine activities are needed to support the project's success?
* If there are problems here, how will these be addressed?
* How does the end result compare with the original project plan, in terms of quality, schedule and budget?
* **Determine the satisfaction of stakeholders.**
* Is the project sponsor satisfied?
* What are the effects on the client or end user?
* If key individuals aren't satisfied, how should this be addressed?
* **Determine the project's costs and benefits.**
* What were the final costs?
* What will it cost to operate the solution?
* What will it cost to support the solution in the future?
* How do the costs compare with the benefits achieved?
* If the project hasn't delivered a sufficiently large return, how can this be improved?
* **Identify areas of further development.**
* Have all of the expected benefits been achieved? If not, what is needed to achieve them?
* Are there opportunities for further training and coaching that will maximise results?
* Could you make further changes, which would deliver even more value?
* Are there any other additional benefits that can be achieved?
* **Identify lessons learned.**
  + How well were the measures of success assessed, and how well were timescales and costs assessed?
  + What went wrong, why did these things go wrong, and how could these problems be avoided next time?
  + What went well, and needs to be learned from?
* **Report findings and recommendations.**
  + What have you learned from this review?
  + Do you need corrective activity to get the benefits you want?
  + What lessons have you learned that need to be carried forward to future projects?
  + Does this project naturally lead on to future projects, which will build on the success and benefits already achieved?

**How to Review**As you perform the PIR, certain methods and practices will help you obtain the best possible information:

* **Define the scope of the review beforehand** -The last thing you want to do is to create a political problem. Given the number of people often involved in a change initiative, it's easy to hurt someone's feelings when reviewing the project's success. Clarify your objectives for the review, and make your intentions clear – this will better ensure that people share their experiences openly and honestly. Then make absolutely sure that you stick to these intentions, and that people's egos aren't unnecessarily bruised by the process!
* **Review key documents** – Gather together the key change documents. This will help you assess the planning process, as well as the actual benefits achieved.
* **Consider using independent reviewers** – Where possible, use outside people in your review process to get an objective, unclouded view of the change. Some people recommend using only independent people in the review, however, you can learn a lot from the perspectives of those who were directly involved in the project – this is why the best strategy is probably to have a balance.
* **Use appropriate data collection** – Collect information in the most appropriate way, for example, by using interviews and surveys. Also, test the measures of success yourself; to make sure you get firsthand information.
* **Deliver appropriate reports** – Report your findings, and publicise the results. Remember that the PIR is designed to help project managers conduct more effective projects in the future, as well as to measure and optimise the benefits of the specific project being reviewed.
* **Present recommendations** – Present the detailed recommendations to the organisation and the project leaders, as well as to customers and other stakeholders. Include as many people as necessary so that you keep – and apply – the best-practice information in the future.

As you plan your PIR, be aware of the costs and benefits of the review process itself. Interviewing stakeholders and customers, testing the solution, and documenting the results are time-consuming activities. Make sure the time and resources dedicated to the review are consistent with the project scope and its output, and that the potential benefits of conducting the review are worth the effort put in.