

 **Protective Marking**

Post Implementation Review

Project/Program name

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**Contact Us**

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This template includes prompts and example text to support the development of the Post Implementation Review. Delete the prompts and example text before finalising the document.

# About this template

This template includes an optional high-level view (at the end of the template). Feel free to only complete this high-level view should you wish to.

The purpose of the Post Implementation Review (PIR) is to:

* assess whether the project/program objectives were achieved, the benefits have been realised and the effectiveness of the change management
* identify any outstanding issues and lessons learnt
* make recommendations as appropriate

More broadly the PIR supports stakeholders in achieving long term success, lifting adoption and reaping change benefits and is encouraged to be completed for all types and scales of change. Additionally, the knowledge gained is shared with the organisation more broadly and can be incorporated into future change management planning.

The PIR can also be used as an assessment tool following key milestones/deliveries during multi-year projects/programs. In this scenario, consideration should be given to conducting each review with a consistent approach so that each review builds on the previous one and an overall review of the project/program is achieved.

The PIR should be completed as soon as practical following the transition of the change to business as usual. Please complete all sections of this template in collaboration with key stakeholders.

For change management guidance and support, please contact the APS Change Management Centre of Excellence at PortfolioChangeStewardshipOffice@homeaffairs.gov.au

## To complete this document

### Review project/program and change management documentation to:

* confirm your understanding of the objectives and intended benefits
* form an initial impression on whether the objectives were achieved, the benefits have been realised and the effectiveness of the change management
* identify questions/areas of focus to be used when engaging stakeholders

### Identify appropriate methods of engaging a cross-section-of/all stakeholders.

* This could include questionnaires/surveys, interviews, workshops, user observations, general discussion and/or benchmarking. A mix of methods is recommended to gain meaningful input from a cross-section of all the stakeholders. For example a survey may be suitable to engage APS and EL staff however one-on-one interviews may be more appropriate for engaging executives/SES.

### Engage a cross-section-of/all stakeholders to draw out their perspective and gather data on:

* if the project/program objectives were achieved
* if the benefits have been realised
* the effectiveness of the change management including:
	+ how change impacts were addressed
	+ engagement and communication (including channels used)
	+ stakeholder/executive buy-in and support
	+ training/capability support
	+ change readiness
	+ transition support
	+ issue management and resolution
* any outstanding issues
* lessons learnt

### Analyse the data gathered to identify the findings.

#### Consider:

* Expected outcomes e.g. objectives, benefits
* Experience outcomes e.g. the change management, how the change affected the stakeholders (especially those primarily impacted) and how this is affecting them now
* Outstanding items e.g. project/program products, operational issues, final transition/change support activities
* Unexpected outcomes e.g. if the ongoing operational costs originally outlined (in project/program documentation for example) are no longer accurate; any additional outcomes, either positive or negative which were not expected
* Lessons learnt e.g. overall approach, delivery/transition, what was delivered

### Consider why the findings occurred and make recommendations on if and how they could be resolved.

### Document the PIR approach, findings and recommendations using this template.

* **Note**: PIR recommendations move to the business stakeholders on project and change management completion.

### Share the PIR with the central change management function and/or other change managers so that the findings may be shared with the organisation more broadly, and be incorporated into future change management planning.

If the Version Control and Endorsement section is not required for this change, this section can be deleted.

**Version control and endorsement**

**Version control**

Before use, please verify this document is current.

|  |  |
| --- | --- |
| **Version number** | **###** |
| Version date |  |
| Document status |  |
| File name |  |
| Author |  |
| Record management reference |  |

**Reviews and approvals**

This document has been reviewed and approved by the people in this list. Evidence of the approvals is retained in *Record Management* system.

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# Introduction

Provide a short description of the document purpose or use standard text below.

The Post Implementation Review:

* provides an assessment on whether the project/program objectives were achieved, the benefits have been realised and the effectiveness of the change management,
* identifies any outstanding issues and lessons learnt,
* makes recommendations as appropriate.

**Note**: PIR recommendations move to the business stakeholders on project and change management completion.

The Post Implementation Review is the last chapter of the Change Playbook. Each Change Playbook chapter builds on from the previous one/s. Not all chapters are completed for every change initiative. The Change Manager decides on the appropriate documentation to support the change management.

Please refer to the first chapter, the Change Context for the list of the playbook chapters, which include further information on the change management of this project/program.

|  |  |
| --- | --- |
| Chapter title | Record management reference |
| Change Context  | Record Management reference |

# Approach

Provide an overview of how the PIR was conducted.

Include:

* When the PIR was conducted and by whom
* What project/program and change management documents were reviewed
* What stakeholder engagement/data gathering technique/s were used
* The users and stakeholders from whom the data was gathered and their positions both internally and externally to the organisation

# Summary of findings and recommendations

Provide a brief overview.

Include:

* The objectives achieved and benefits realised
* The objectives in the process of being achieved and the benefits in the process of being realised
* The effectiveness of the change management
* The other findings and recommendations

# Findings and recommendations

Use the following table to document the findings and recommendations. Add rows as needed.

| NUMBER | FINDING TYPE | FINDING | RECOMMENDATION | TIMEFRAME | STATUS | RESPONSIBILITY |
| --- | --- | --- | --- | --- | --- | --- |
| 1 | Expected outcome OR Experience outcome OR Outstanding item OR Unexpected outcome OR Lesson learnt | The expected outcome and what actually occurred OR experience outcome OR outstanding item OR unexpected outcome OR lesson learnt | The appropriate action to resolve the finding | When the recommendation will be implemented | The current status/progress of implementing the recommendation | The person responsible for implementing the recommendation Note: PIR recommendations move to the business stakeholders on project and change management completion. |
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# Post Implementation Review high-level view

## Completing this high-level view of the Post Implementation Review is optional. Feel free to only complete this high-level view should you wish to. The high‑level view page view can be a useful tool when discussing the change management with stakeholders.

Project/Program name

## Date last updated:

|  |  |
| --- | --- |
| Approach | Summary of findings and recommendations |
| Provide an overview of how the PIR was conducted. Include: * When the PIR was conducted and by whom
* What project/program and change management documents were reviewed
* What stakeholder engagement/data gathering technique/s were used
* The users and stakeholders from whom the data was gathered and their positions both internally and externally to the organisation
 | Provide a brief overview.Include:* The objectives achieved and benefits realised
* The objectives in the process of being achieved and the benefits in the process of being realised
* The effectiveness of the change management
* The other findings and recommendations
* What has been done with the recommendations so far
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