

Assessment

**Task 3**

**Undertake project work**

**BSBPMG430**



**Student Declaration**

To be filled out and submitted with assessment responses

◻ I declare that this task and any attached document related to the task is all my own work and I have not cheated or plagiarised the work or colluded with any other student(s)

◻ I understand that if I am found to have plagiarised, cheated or colluded, action will be taken against me according to the process explained to me

◻ I have correctly referenced all resources and reference texts throughout these assessment tasks.

◻ I have read and understood the assessment requirements for this unit

◻ I understand the rights to re-assessment

◻ I understand the right to appeal the decisions made in the assessment

|  |  |  |
| --- | --- | --- |
| **Unit Title**  **Unit Code** | | |
| **Student name** |  | |
| **Student ID number** |  | |
| **Student signature** |  | **Date** |
| **Task Number** |  |  |

|  |
| --- |
| **------OFFICE USE ONLY-----**  For Trainer and Assessor to complete:  ◻ Student requested reasonable adjustment for the assessment |

| **Completed successfully**  **Did the student satisfactorily:** | **Comments** | **Y** | **N** | **DNS** |
| --- | --- | --- | --- | --- |
| The student has satisfactorily completed and submitted the following:   * Risk Assessment form - at 25% timeframe in Task 3.1 * Issues log - at 50% timeframe in Task 3.1 * Change request form - at 50% timeframe in Task 3.1 * Status Report - at 25% timeframe in Task 3.1 * Status Report - at 50% timeframe in Task 3.1 * Status Report - at 75% timeframe in Task 3.1 * Training session planning notes in Task 3.2 * Feedback from team members in Task 3.2 * Post-project review meeting in Task 3.3 * Budget variation report in Task 3.3 * Post-project review report in Task 3.3 * Sign-off for concluding the project from project sponsor in Task 3.3 |  |  |  |  |
| Demonstrated ability to:   * Establish and maintain required recordkeeping systems throughout the project   This is evidenced by:   * Reports developed in Task 3.1 * Project finalisation documents developed in Task 3.3 |  |  |  |  |
| Demonstrated ability to:   * Implement and monitor plans for managing the project * Undertake risk management as required   This is evidenced by:   * Risk Assessment form - at 25% timeframe in Task 3.1 * Issues log - at 50% timeframe in Task 3.1 * Change request form - at 50% timeframe in Task 3.1 * Status Report - at 25% timeframe in Task 3.1 * Status Report - at 50% timeframe in Task 3.1 * Status Report - at 75% timeframe in Task 3.1 |  |  |  |  |
| Demonstrated ability to:   * Document feedback and suggested improvements * Document feedback and suggested improvements   This is evidenced by:   * Feedback from the project team in Task 3.2 |  |  |  |  |
| The student delivered the training session to the project team.  Feedback in comments. |  |  |  |  |
| Demonstrated ability to:   * Provide support to team members to enable them to achieve deliverables and to transition them as appropriate at the completion of the project   This is evidenced by:   * Training session planning notes in Task 3.2 * Delivery of training session (Refer to Marking Sheet) * Feedback from team members in Task 3.2 |  |  |  |  |
| Demonstrated ability to:   * Complete project documentation * Review project outcomes and processes against the project scope and plan   This is evidenced by:   * Feedback from team members in Task 3.2 * Post-project review meeting in Task 3.3 * Budget variation report in Task 3.3 * Post-project review report in Task 3.3 |  |  |  |  |
| The student attended the project finalisation meeting with the project sponsor and obtained sign-offs for concluding the project:   * Final Project Budget Review * Staff transition noted * Project review report * Project is fully finalised |  |  |  |  |
| When collaborating with the group, the student has actively participated in group work with a substantial contribution that can be assessed individually for all this task's requirements. |  |  |  |  |
| **Task Outcome: Satisfactory  Not Yet Satisfactory** | | | | |
| **Student Name:** | | | | |
| **Assessor Name**:  **Assessor Signature:**  **Date:** | | | | |

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# **Task 3 – Administer, monitor and finalise the project**

| **Task summary and instructions** | |
| --- | --- |
| **What is this assessment task about?** | This task builds on Task 2.  This task comprises of the following assessment methods:   * Product-based * Direct observation of Role-Play * Case Study * Other (specify)   It has been designed to evaluate your ability to/competency in:   * Establish and maintain required recordkeeping systems throughout the project * Implement and monitor plans for managing the project * Undertake risk management as required * Provide support to team members to enable them to achieve deliverables and to transition them as appropriate at completion of the project * Complete financial recordkeeping associated with project and confirm according to agreed budget * Complete project documentation and obtain sign-offs for concluding project * Review project outcomes and processes against the project scope and plan * Document feedback and suggested improvements   You are required to address the following:   * **Task 3.1 Monitor the project** * Address project execution scenarios and complete required reporting * **Task 3.2 Support the project team** * Deliver a training session for the team * **Task 3.3 Finalsie and review the project** * Complete project finalisation documentation * Obtain sign-off to close the project   Although the assessment requires group collaboration to simulate a work environment, the assessment submission is individual, and it will be marked as such. |
| **What do I need to do to complete this task satisfactorily?** | * submit the completed assessment tasks, according to instructions, * complete the tasks with sufficient detail and present them in a professional manner, * use your own words and reference sources appropriately, * meet the word count where required, * use the scenario provided, * use the templates provided where required, * for your performance to be deemed satisfactory in this assessment task you must satisfactorily address all of the assessment criteria, * if part of this task is not satisfactorily completed you will be asked to complete further assessment to demonstrate satisfactory performance. |
| **Specifications** | **You must deliver/participate in:**   * Training session (Role-Play) for the team in week 5 * Meeting with the team in week 5 (Role-Play) * Meeting with the project sponsor (Role-Play) in week 6   **You must submit to GOALS**   * Risk Assessment form - at 25% timeframe * Issues log - at 50% timeframe * Change request form - at 50% timeframe * Status Report - at 25% timeframe * Status Report - at 50% timeframe * Status Report - at 75% timeframe * Training session planning notes * Feedback from team members * Post-project review meeting * Budget variation report in * Post-project review report * Sign-off for concluding the project from the project sponsor |
| **Resources and equipment** | * Computer with Internet access * Access to Microsoft Office suites or similar software * Learning material * Scenario for assessment as provided * Appendices as provided * Relevant policies and procedures as provided * Templates as provided |
| **Re-submission opportunities** | You will be provided feedback on your performance by the Assessor. The feedback will indicate if you have satisfactorily addressed the requirements of each part of this task. If any parts of the task are not satisfactorily completed, the assessor will explain why, and provide you written feedback along with guidance on what you must undertake to demonstrate satisfactory performance. Re-assessment attempt(s) will be arranged at a later time and date. You have the right to appeal the outcome of assessment decisions if you feel that you have been dealt with unfairly or have other appropriate grounds for an appeal. You are encouraged to consult with the assessor prior to attempting this task if you do not understand any part of this task or if you have any learning issues or needs that may hinder you when attempting any part of the assessment. |

**Complete the following activities:**

## **Task 3.1 Monitor project progress**

Assume the following scenarios occurred when implementing the project:

| **Scenarios** | |
| --- | --- |
| **25% timeframe** | The following has occurred:   * 2 project team members are ill and will be on sick leave for 1 week * A glitch in the CRM (Customer Relationship Management System) used in the organisation (which is also used to gather data for project reporting) has caused the data to be inputted incorrectly for 3 days. The data will have to be double-checked for accuracy and correctness, 1 project team member must go back to his/her old role and help resolve the issue for 2 days. |
| **50% timeframe** | The following has occurred:   * the team has been required to work additional hours due to the flu forcing several team members to ask for sick days at different times, * an error in estimating an item in the budget has caused an increase in budget by 8%, * the schedule is now one week behind, * the course development firm engaged to design the courses is delivering their work 4 weeks late, * the team member explicitly employed for the project has resigned. |
| **75% timeframe** | The following has occurred:   * the project team is fully operating again, * a new external project team member has been appointed, * the project manager has decided to conduct additional training on WHS for the team, the project sponsor has agreed on this, and it will increase the budget by $500.00, * a public holiday was not reported in the project schedule, and this will affect 2 workdays, * a spelling mistake was found in one of the communication material developed for the project. The project sponsor requested for the material to be corrected and printed again. This will cause a one week delay in the project schedule and an increase in budget by 5 %. |

Develop the following reports to meet the recordkeeping system requirements:

1. A risk assessment form to the project manager's attention for the risk identified at 25% timeframe. (Template 1),
2. An issue log for the issues arisen at 50% timeframe. (Template 2),
3. A change form to request the changes needed as part of the issue resolution strategy for the issues arisen at 50% timeframe. (Template 3),
4. 3 status reports at 25%, 45%, 75% timeframe. Write a brief email with a summary of the reports' content when forwarding them to the project sponsor. (Templates 4,5,6).

**Template 1 - Risk Assessment form - at 25% timeframe**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project details** | | | | |
| **Project Name**  Project name to which the risk relates  **Project Manager**:  Name of the project manager responsible for mitigating the risk. | | | | |
| **Risk details** | | | | |
| **Risk ID:**  Number allocated to this risk.  **Raised by:**  Name of the person who has raised the risk.  **Date raised:**  Date of completion of this form. | | | | |
| **Description of risk**:  Briefly describe the identified risk and its possible impact on the project (e.g. scope, resources, deliverables, timelines and/or budgets).  (30-50 words) | | | | |
| **Likelihood of risk:** Describe and rank the likelihood of the risk occurring (i.e. low, medium or high). | | **Impact of risk:** Describe and rank the project's impact if the risk occurs (i.e. low, medium or high). | | |
| **Risk mitigation** | | | | |
| **Preventative actions recommended:** Briefly describe any action that should be taken to prevent the risk from occurring.  (30-50 words)  **Contingency actions recommended:** Briefly describe any action that should be taken, should the risk occur, to minimise its impact on the project. (30-50 words) | | | | |
| **Approval details** | | | | |
| **Supporting documentation:** Details of any supporting documentation used to substantiate this risk. | | | | |
| **Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date: \_\_\_ /\_\_\_ /\_\_\_\_**  PLEASE FORWARD THIS FORM TO THE PROJECT MANAGER | | | | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system | | | | |
| **Project Title:** | | | **Project Client:** | **Date:  Version:** |
| **Project Sponsor:** | **Project Manager:** | | **File Name:** | |

**Template 2 - Issues log - at 50% timeframe**

In this template, all issues are treated as risks. When they arise, they should be recorded and assigned a number and responsibility, a recovery strategy or alternate path agreed, acted upon, and recorded when closed. A minimum of 1 issue must be identified and treated.

| **Issue** | **Strategy** | | **Date logged** | **Date resolved** |
| --- | --- | --- | --- | --- |
|  |  | |  |  |
|  |  | |  |  |
|  |  | |  |  |
| Signed:  **Project Manager** | Signed:  **Sponsor** | | Signed:  **Client** | Signed: |
| Date: | Date: | | Date: | Date: |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | |
| **Project Title:** | | | **Project Client:** | **Date:  Version:** |
| **Project Sponsor:** | | **Project Manager:** | **File Name:** | |

**Template 3 - Change request form - at 50% timeframe**

This form is used to assist with recording and managing changes in scope, time, quality or budget needed to address the issue/s. The change management procedure must be negotiated with the key stakeholders prior to the sign-off of the project plan.

| **Change request – Project** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Issued by** |  | | | | | |
| **Change Requested** |  | | | | | |
| **Reason for change** |  | | | | | |
| **Impact on scope** |  | | | | | |
| **Impact on budget** |  | | | | | |
| **Impact on schedule** |  | | | | | |
| **Change authorised:** | **Yes/No** | | | **Adj. completion date:** | **Adj. final budget: $** | |
| Signed:  **Project Manager** | Signed  **Sponsor** | | | Signed  **Client** | Signed | |
| Date | Date | | | Date | Date | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | | | |
| **Project Title:** | | | **Project Client:** | | | **Date:  Version:** |
| **Project Sponsor:** | | **Project Manager:** | **File Name:** | | | |

**Template 4 - Status Report - at 25% timeframe**

|  |
| --- |
| Email to project sponsor:  <Add text (50-100 words) |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***Project Name:***  **Project Status** G: Y: R: | | | | | | | |
|  | Overall | Timeline | Budget | Resources | Scope | Quality | Risk |
| **Status** |  |  |  |  |  |  |  |

| **Status Report** | | | | |
| --- | --- | --- | --- | --- |
| ***Project Name***  **Prepared by:**  **Date:**  **Attention to:** | | | | |
| **Executive summary report**  Use this section for summary information about the status of the project.  (30-50 words) |  | | | |
| **Deliverable status**  Use this section for summary information about the status of the deliverables of the project. | **Deliverable** | **Work to date** | **Planned realisation date** | **Status** |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |
| **Schedule status**  Use this section for a summary of the status of the project's schedule*.* | **Milestones and date** | **Status** | **Date completed** | **Notes** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Budget status**  Use this section for a summary of the status of the project's budget | **Budget Item** | **Estimated cost** | **Actual Cost** | **Variation %** |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |
| **Quality status**  Use this section for a summary of the status of the project's quality. | **Deliverable** | **Quality requirements** | **Status** | **Variations or plan to achieve quality requirements** |
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| --- | --- | --- | --- |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system | | | |
| **Project Title:** | | **Project Client:** | **Date:  Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | |

**Template 5 - Status Report - at 50% timeframe**

|  |
| --- |
| Email to project sponsor:  <Add text (50-100 words) |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***Project Name:***  **Project Status** G: Y: R: | | | | | | | |
|  | Overall | Timeline | Budget | Resources | Scope | Quality | Risk |
| **Status** |  |  |  |  |  |  |  |

| **Status Report** | | | | |
| --- | --- | --- | --- | --- |
| ***Project Name***  **Prepared by:**  **Date:**  **Attention to:** | | | | |
| **Executive summary report**  Use this section for summary information about the status of the project.  (30-50 words) |  | | | |
| **Deliverable status**  Use this section for summary information about the status of the deliverables of the project. | **Deliverable** | **Work to date** | **Planned realisation date** | **Status** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Schedule status**  Use this section for a summary of the status of the project's schedule. | **Milestones and date** | **Status** | **Date completed** | **Notes** |
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|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Budget status**  Use this section for a summary of the status of the project's budget | **Budget Item** | **Estimated cost** | **Actual Cost** | **Variation %** |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
| **Quality status**  Use this section for a summary of the status of the project's quality. | **Deliverable** | **Quality requirements** | **Status** | **Variations or plan to achieve quality requirements** |
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| --- | --- | --- | --- |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system | | | |
| **Project Title:** | | **Project Client:** | **Date:  Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | |

**Template 6 - Status Report - at 75% timeframe**

|  |
| --- |
| Email to project sponsor:  <Add text (50-100 words) |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ***Project Name:***  **Project Status** G: Y: R: | | | | | | | |
|  | Overall | Timeline | Budget | Resources | Scope | Quality | Risk |
| **Status** |  |  |  |  |  |  |  |

| **Status Report** | | | | |
| --- | --- | --- | --- | --- |
| ***Project Name***  **Prepared by:**  **Date:**  **Attention to:** | | | | |
| **Executive summary report**  Use this section for summary information about the status of the project.  (30-50 words) |  | | | |
| **Deliverable status**  Use this section for summary information about the status of the deliverables of the project. | **Deliverable** | **Work to date** | **Planned realisation date** | **Status** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Schedule status**  Use this section for a summary of the status of the project's schedule. | **Milestones and date** | **Status** | **Date completed** | **Notes** |
|  |  |  |  |
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|  |  |  |  |
| **Budget status**  Use this section for a summary of the status of the project's budget | **Budget Item** | **Estimated cost** | **Actual Cost** | **Variation %** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Quality status**  Use this section for a summary of the status of the project's quality. | **Deliverable** | **Quality requirements** | **Status** | **Variations or plan to achieve quality requirements** |
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| --- | --- | --- | --- |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | |
| **Project Title:** | | **Project Client:** | **Date:  Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | |

## **Task 3.2 Support the project team**

This is a Role-Play in simulated work conditions.

Meet with the team in week 5 of class to train and mentor them on one of the following topics:

* how to prioritise tasks
* importance of managing risks in projects,
* conflict management,
* active listening,
* manage stress.

Choose one topic and research it to prepare for the coaching session. Choose a suitable training approach (for example, PowerPoint presentation, learning activity, or coaching).

List the topic of choice and summarise the training approach in the space provided below:

|  |
| --- |
|  |

The trainer and assessor will validate that the training session took place and provide comments on the marking sheet.

If you are absent from class, it is your responsibility to make alternative arrangements with the trainer and assessor to organise the team's meeting.

At the end of the training session, obtain feedback from the team (Template 7) and provide evidence of the completion of the feedback form/s (scanned copies, for example).

**Template 7 – Feedback Form**

| **Feedback Form** | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Full Name and signature of the student completing the feedback form.** | **Full Name**:  **Signature**: | | | | | | | | | |
| **Date** |  | | | | | | | | | |
| The PM facilitated the training effectively. | Strongly Agree | | Agree | | Neutral | | Disagree | | Strongly Disagree | |
|  | |  | |  | |  | |  | |
| The PM was knowledgeable about the topic. | Strongly Agree | | Agree | | Neutral | | Disagree | | Strongly Disagree | |
|  | |  | |  | |  | |  | |
| I felt supported in my role as a project team member. | Strongly Agree | | Agree | | Neutral | | Disagree | | Strongly Disagree | |
|  | |  | |  | |  | |  | |
| The PM established a relationship of mutual trust and respect with the team members. | Strongly Agree | | Agree | | Neutral | | Disagree | | Strongly Disagree | |
|  | |  | |  | |  | |  | |
| The PM ensured that we all understood the topic. | Strongly Agree | | Agree | | Neutral | | Disagree | | Strongly Disagree | |
|  | |  | |  | |  | |  | |
| The outcome of the training session was…. | Exceptional | Excellent | | Very Good | | Good | Fair | Poor | | Very Poor |
|  |  | |  | |  |  |  | |  |
| Opportunities for improvement.  List 2-3. |  | | | | | | | | | |

## **Task 3.3 Finalise and review the project**

The project is now completed.

1. Meet with the project team in simulated work conditions. Organise the meeting in week 5 of class and reflect on how the project was planned and delivered and produce the following reports:

* post-project review meeting (Template 8),
* budget variation report (Template 9),
* post-project review report (Template 10).

Duration: 15-20 minutes

1. Meet with the project sponsor (played by the project sponsor in simulated work conditions) in week 6 of class (5 minutes) and discuss project finalisation. Present the final reports to the project sponsor and obtain sign-off for concluding the project.

* This is a Role-Play in simulated work conditions.
* The trainer and assessor will document the sign-off on the marking sheet.

If you are absent from class, it is your responsibility to make alternative arrangements with the trainer and assessor to organise the meetings.

**Template 8 -Post project review meeting**

This report provides a record of the post-project review meeting with the project team, detailing items that were discussed when reviewing the overall project. Use it to record the meeting with the project team. Customise the template and add additional rows as needed.

| **Post-Project Review Meeting** | | | | |
| --- | --- | --- | --- | --- |
| **Topic** | | | **Speaker** | |
| **Brief overview of project:** Purpose of the project, major accomplishments, comments. | | | Project Manager | |
| **Review by team:** Goals, objectives, deliverables, schedule, budget, and success criteria (Were they met, partially met, or missed?). | | | All | |
| **What worked/what could have gone better?** Some areas to consider:   * project planning, * project management, * project scheduling and tracking, * project estimating, * communication (with team, other groups/stakeholders, sponsor), * risk management, * vendor management, * issues management, * stakeholder management, * resourcing, * users, * project development approach, * training, documentation, * technology, * overall approach to project (i.e. vendor package, staged implementation, etc.), * production and operation support | | | All | |
| **Transition arrangements**  Outline the transition arrangements for team members to transition them at the completion of the project and determine any support required. | | |  | |
| **Lessons learned** | | | All | |
| **Next steps** | | | All  5 min. | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system | | | | |
| **Project Title:** | | **Project Client:** | | **Date:  Version:** |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | | |

**Template 9 -** **Budget variation report**

The project budget is a prediction of the costs associated with a particular project. These costs include labour, materials, and other resources required to complete the project. At the end of the project review budget variations and how the project performed in relation to budget. Customise the template and add additional rows as needed.

| **Budget Variation Report** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Expense** | | | **Budget** | **Actual** | | **% Variation** |
|  | | |  |  | |  |
|  | | |  |  | |  |
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|  | | |  |  | |  |
|  | | |  |  | |  |
| **Subtotal** | | |  |  | |  |
|  | | | | | | |
| **TOTAL** | | |  |  | |  |
| **Record**  *Complete the filing record below so that the project document can be saved in the project management record system* | | | | | | |
| **Project Title:** | | **Project Client:** | | | **Date:  Version:** | |
| **Project Sponsor:** | **Project Manager:** | **File Name:** | | | | |
|  |  |  | | | | |

**Template 10 -** **Project review report**

This template is used to guide you through the process of conducting a post-project review. This template can be used to document the key learning in terms of what worked well and what could have been improved. Customise the template and add additional rows as needed.

| **Post-Project Review Report** | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Name of project:** | | | | | | | | |
| **Overview** Brief summary of highlights and achievements, etc. (50-100 words) | | | | | | | | |
|  | | **Met** | | | **Missed** | **Partially met** | | **Comments** |
| **Project objectives** | |  | | |  |  | |  |
|  | |  | | |  |  | |  |
| **Project Deliverables** | |  | | |  |  | |  |
|  | |  | | |  |  | |  |
|  | |  | | |  |  | |  |
| **Success criteria** | |  | | |  |  | |  |
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|  | |  | | |  |  | |  |
|  | |  | | |  |  | |  |
| **Schedule** | |  | | |  |  | |  |
| **Budget** | |  | | |  |  | |  |
| **Worked well**  List 3-5 items | | | | **Could have gone better**  List 3-5 items | | | | |
|  | | | |  | | | | |
| **Lessons learned** (50-100 words)**:** | | | | | | | | |
| **Suggested improvements** (50-100 words): | | | | | | | | |
| **Record**  Complete the filing record below so that the project document can be saved in the project management record system. | | | | | | | | |
| **Project Title:** | | | **Project Client:** | | | | **Date:  Version:** | |
| **Project Sponsor:** | **Project Manager:** | | **File Name:** | | | | | |