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Check out the Companion Template

This companion Project HEADWAY Post-Implementation Review can help project managers with better review, specification and procedures.

[Use the Template](#)

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Quality Assurance (QA) establishes a process by which projects are evaluated to determine whether they are compliant or “at risk.” The QA process uses an approved and published Project Methodology as a baseline for this evaluation. In addition, QA recommends specific action steps for projects at risk of non-compliance. QA also implements a procedure for performing a follow-up review.

This review process occurs within different time frames based on project criticality and complexity. Specific procedures must be followed to ensure timely and effective review of deliverables. Quality Assurance addresses these issues by implementing a disciplined review approach that correlates to the project life cycle.

The review is a layered approach, which allows the Review Team to provide advice and counsel to project teams after citing findings during face-to-face-interviews.

Project Managers (PMs) assign subject matter roles to team members. During the Review Interview, team members will be responsible for answering subject matter questions based on their respective roles. Project Managers may choose not to assign roles to their team members; in this case the PM would answer all review team questions personally.

QA will assign a team to conduct the review process. The roles will include the QA Review Team Leader and the QA Analyst. The organization will become involved in the review process to the level it considers appropriate.

Each project is subject to two types of reviews: Standard and Special: Stakeholder Requested Review. A standard review process will consist of three phases: Initiation, Research, and Report. Two standard reviews are planned for each project. A special review may be held if the

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The Standard Review has three phases: Initiation, Review, and Report. During the Initiation Phase, the review date, time, and location are scheduled with the project's Project Manager. Analysis of the project's deliverables by Review Team's QA Analyst is the primary activity in the Research Phase, which lasts approximately two weeks. The face-to-face interview will last one to four hours. A final report will be written during the third phase.

Face-to-Face Interview

During the Research Phase, a face-to-face interview is held that will last one to four hours depending on the complexity of the project being reviewed. The PRL leads the face-to-face interview through a list of questions. The questions and corresponding responses are stored in a Lotus Notes review database. The Review Team will then determine whether the project is labeled compliant or "at risk."

Roles

The following Roles will be allocated within the Project Review Process. The Project Manager will determine who will fill these roles for the project team. One person can fill several roles or each role can be assigned to one person.

QA Project Review Team

- **Project Review Leader (PRL):** Conducts the review, analyzes documents, creates interview notes to evaluate findings and makes recommendations to address risk exposures.
- **QA Analyst (Analyst):** Assists the PRL with deliverable analysis and comparisons to ESTABLISHED project standards.
- **Recorder:** Responsible for taking notes during the interview. This role will likely be fulfilled by the Analyst to ensure that key ideas and discussions that may be relevant to findings, issues, or final review determination will be captured.

Project Team

- **Project Manager:** Designated spokesperson for the project. Responsible for ensuring the required deliverables are in the designated location during the project's life.
- **Testing Coordinator:** Designated spokesperson for testing questions raised during the face-to-face interview.

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The Project Manager will ensure that all project-related materials, including the Project Plan, are current and ready for review.

After the review is completed, the Project Manager must take action to address the findings and recommendations documented in the report if the project was labeled Non-Compliant.

Project Review Team

The Review Team will distribute the PM Project Review Guidelines and Document Review Checklist to the Project Manager once the review has been scheduled. These documents will give the Project Manager an understanding of the review process as well as a list of deliverables. This list of deliverables will identify the focus of the review analysis.

The Review Team will notify the Project Manager of the review by e-mail, which will specify the confirmed date, time, and location.

The Review Team will review the project team's deliverables during a two-week period prior to the scheduled face-to-face interview. During this process, the Analysts will evaluate whether the review deliverables meet required standards.

The Review Team's analysis will also evaluate whether the project's documentation is an accurate representation of the evolving deliverables. For example, If TPD (Technical Procedure Design) has just been completed, does the project plan reflect that progress in a timely fashion?

During the two-week analysis period, the Review Team will be comparing project documentation and deliverables against the established Standard for Testing, as well as M Methodology for Project Management.

Prior to the face-to-face interview, the PRL will analyze the information in the project review packets to identify issues for discussion during the face-to-face. The PRL will use these issues as a starting point from which to build questions for each face-to-face interview.

The PRL will direct the face-to-face interview. The PRL will publish a review agenda prior to the face-to-face interviews. The agenda will specify the deliverables and the discussion's time frame.

During the face-to-face interview, the PRL will identify issues and lead the discussion. The review will follow the distributed agenda, which consists of the PRL's questions. If findings

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A Project Review Report will be generated from the project review process. Based on these findings, the project will be categorized as Red, Yellow, or Green. The project's status will indicate whether the project complies with project management standards. A second review will be scheduled for all projects. How soon and to what depth will be determined by the findings. An action plan to address risk exposures must be put in place for Yellow and Green projects.

Thus, the project review process helps to identify those areas that require attention to make the project team and the project manager successful. The project reviews will be conducted in three phases that are described below in detail.

Initiation Phase

The Project Review team compiles an Entry Packet, which contains materials to help the PM understand the Project Review Process and that which the Project Manager needs to make available for the project review. The Project Review Leader will deliver the Entry Packet to the Project Manager in the review kickoff session. Subsequent meetings will be scheduled with the Project Manager and project team members. The entry packet will typically contain the PM Process Overview document, the PM Checklist and sample questions. Project Managers should ensure that documents are stored in their designated areas. The Project Manager will identify the Project's participants and their respective roles.

Research Phase

The Research Phase is divided into two activities: Documentation Review and Interview. During the Document Review, documents are retrieved for analysis to ensure that required project deliverables are in their designated location. Steps conducted in the research phase include:

1. The Analyst will create a document packet from project documentation.
2. The Review Team will conduct informal exploratory interviews with Package Coordinator, team leads, Planner, Testing Coordinator, Administrative Support Assistant for the project, etc.
3. The deliverables and documentation are analyzed, and then compared against the approved Project Methodology.
4. Interview preparation activity is performed.

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The PRL will determine the project's status.

Recommendations will be made to the Project Manager. The Project Manager then implements the recommend changes.

If the project has been determined to be “at risk” a follow-up review will be scheduled.

The PRL will write the Project Review Report.

The Project Review Report will be distributed to the Project Manager and the Project Management Office. A copy will then be stored in the Review archives.

If additional information is requested by the organization due to the complexity and/or severity of the findings, the PRL will brief the organization on the results of the review.

Types of Reviews

There are four types of reviews conducted during the course of a project. The reviews are to be conducted after control points are triggered.

First Project Review

The first project review will determine if the project meets the Requirement defined as necessary to initiate a project. Project phases included in this review could include; Project Planning and Initiation (PPI), System Requirement Analysis (SRA), PM System Acceptance Testing (SAT), and Transition TRA

Completion Review

The completion review will determine that the project met all requirements, sign-offs, and deliverables defined by the project scope and that the project management process met all required standards. The Completion review will determine that all project technical, financial and contract closure events have been completed correctly.

Special Reviews

Special reviews will determine that the project meets all requirements, sign-offs, and deliverables defined by the project scope to be completed at the point in time the special review is conducted. It will determine that all project management processes are in place and meet all required standards. The special review will determine that all project technical, financial and client closure events due at the time of the review have been completed correctly.

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A stakeholder in the project (including a Project manager) can request an "ad hoc" or Special Review (RS). The rationale for an "ad hoc" review can include any of the following: (1) change in Project Managers, (2) a significant issue that may effect the project's ability to deliver the required solution, and (3) project that has been classified as "Non-Compliant Project" and requires a specific finding or issue addressed. A Stakeholder Requested Review will be conducted to examine the identified issue. The format of this review is similar to the standard Project Review. The stage in the project's life cycle will determine what deliverables will be reviewed.

Review Timing and Frequency

Timing of Reviews

The types of reviews and their timing are determined by the project's attributes. The three project attributes are (1) the testing or non-testing attribute, (2) project phase, and (3) criticality. These three attributes determine the project's status. The project status determines the timing and composition of project reviews.

The chart above identifies the scheduled reviews. The Special reviews are not included in the chart because conducted on an ad hoc basis.

Scheduled reviews are the (1) Initial, (2) Interim, or (3) Completion Review. A Testing Project rated a 1–4 in criticality, that is Category 1, will have all three scheduled reviews. A Non-Testing Project will have one scheduled review that will be an Interim Review. A Category 2 project will be a testing project rated between 5–7 for criticality with two scheduled reviews, composed of an Initial Review and an Interim Review. Category 3 projects are testing projects that have criticality levels of 8–10; they will have one scheduled review called an Interim Review.

Review Frequency

Review frequencies of reviews are shown in Exhibit 1.

For umbrella programs that have subprojects, PMRs may be conducted on the overall program or the individual projects within the program as determined by the Quality Assurance Team.

Report

Project Status

After the review process the project will be labeled green, yellow, or red. Projects with a red

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Green	None
Yellow	Depending on the nature of the findings, a follow-up review may be held within a month.
Red	A follow-up review will be held within a month to determine if the issues and findings were resolved.

Types of Reports

The Project Management Review Report will be completed and distributed within five business days of the review. It will be distributed to the Project Manager. The Project Manager may distribute copies to significant stakeholders. A copy of the report will be stored in the Quality Assurance archive; the report will be available to approved readers.

This document will be marked Confidential and is intended for internal use only.

The PRL may need to conduct a follow-up session with to review findings and recommendations, especially if the project has significant recommendation items that require management attention.

Compliant

If the project is not at risk, the abbreviated format can be used:

- **Project Determination:** Compliant: No Major Findings exist.
- **Executive Summary:** A one-page briefing that summarizes the Review Team's findings and the basis for their decision.

“At Risk”

If the project is “at risk,” the extended report format will be used:

- **Project Determination:** Non-Compliant: Major Findings exist.
- **Executive Summary:** A one-page briefing that summarizes the Review Team's findings and the basis for their decision.
- **Project Metrics:** A one-page report that compares the project's metrics to the published standards.
- **Issues and Findings:** A report between one and three pages in length that summarizes the issues and findings that have been found during the review process. The length of this section

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