Project Post-Mortem

Post-Mortem Meeting Guidelines

Post-Mortem Meeting Participants and Their Responsibilities

Each participant in a post-mortem meeting has distinct responsibilities for the preparation, procedures, and follow-up of the post-mortem. There are also some common responsibilities shared by the various participants. The participants and their responsibilities are detailed below.

1. **Facilitator**

The Facilitator:

- Designs the preparation for the post-mortem meeting (sets the date, time, and place; estimates required preparation times on the part of all participants; plans the agenda).
- Distributes the post-mortem materials to all participants at least two working days before the post-mortem meeting.
- Makes sure all participants understand their responsibilities and the goals of the meeting.
- Reviews any materials distributed prior to the meeting.
- Controls the flow of the meeting.
- Suggests techniques for setting priorities.
- Suggests methods/approaches for decision making and effective discussions.
- Interprets the meeting process, decisions, and action items.
- Assists and expedites group discussions (e.g., writing on the board and drawing diagrams).
- Keeps the meeting on schedule.
- Helps the group redirect its work by diagnosing problems and assessing progress.
- Helps members of the group maintain effective working relationships.
- Takes notes for the meeting, including the formal recording of all accomplishments made, problem areas identified, and decisions made. A separate individual might be appointed as a Scribe with this responsibility, if appropriate.
- Signs the meeting attendance list.
- Prepares and distributes the post-mortem report.

2. **Project or Project Stage Manager**

The Project or Project Stage Manager:

- Provides any materials to be distributed to the Facilitator prior to the post-mortem meeting.
• Presents an overview of the project, project stage, or key milestone for which the post-mortem is being conducted.

• Helps control the flow of the meeting.

• Records all accomplishments made, problem areas identified, and decisions made at the appropriate level of detail for action later. These notes supplement other notes taken by the Facilitator or Scribe.

• Participates in the group discussions and decision making.

• Signs the meeting attendance list.

• Assists the Facilitator in writing the post-mortem report.

• After the post-mortem meeting, manages the resulting action items to resolve the problem areas identified.

3. Project or Project Stage Team Members

The Team Members:

• Prepare prior to the post-mortem by thoroughly reading and taking notes about any relevant project, project stage, or key milestone materials.

• Identify accomplishments and problem areas.

• Suggest reasons for the problem areas.

• Participate in the group discussions and decision making.

• Sign the meeting attendance list.

Templates and Sample Forms

A sample agenda for a post-mortem meeting and a sample post-mortem report outline are shown on the following pages.
Post-Mortem Agenda

<Meeting Name>

<Date, Start Time - End Time>

<Location>

Purpose: <Purpose>

Objective: <Objective>

Note Taker: <Note Taker>

Introduce participants.

Revisit goals and responsibilities.

- Explain the goals of the post-mortem.
- Explain participants' responsibilities.

Present project summary.

- Present a summary of the project, project stage, or key milestones.

Identify accomplishments and contributions.

- Identify those project or milestone items that the team members think worked well.
- Hold group discussion.
- Identify problem areas.

Identify those project or milestone items that the team members did not think worked well.

- Hold group discussion.
- State the action items.

Sign the meeting attendance list.
Post-Mortem Report Outline

I. Identification
   - Project, project stage, or key milestone name
   - Document identification number
   - Post-mortem Facilitator
   - Project or Project Stage Manager
   - Date of post-mortem
   - Post-mortem method (meeting or written questionnaire)

II. Project Summary

Summary of the project, project stage, or key milestone, including begin and end dates and work performed.

III. Accomplishments

Detailed list of each accomplishment identified.

IV. Problem Areas

Detailed list of each problem area identified.

V. Action Items

Detailed list of all action items generated to resolve the problem areas.
Post-Mortem Questionnaire Guidelines

Whether performed in a meeting or with a written questionnaire, the goals of a post-mortem are the same. A sample questionnaire outline is shown below.

**Post-Mortem Written Questionnaire Outline**

I. *Introduction*

- State purpose and goals of the post-mortem.
- Summarize in review the project, project stage, or key milestone for which the post-mortem is being conducted.

II. *Instructions*

Give complete directions for:

- How to respond to the questions.
- Whom to contact if more information is needed.
- How to return the completed questionnaire.
- Due date for responses (highlight this).

III. *Demographic Data*

The following are examples of this type of data:

- Respondent's name (do not request if anonymity is desired)
- Respondent's position
- Date

IV. *Accomplishments*

- Ask what the respondent thinks worked well during the project, project stage, or key milestone, and why.
- Leave enough room for multiple responses.

V. *Problem Areas:*

- Ask what the respondent thinks did not work well during the project, project stage, or key milestone, and why.
- Leave enough room for multiple responses.

VI. *Miscellaneous Comments*

Provide space and allow for the respondent to provide miscellaneous comments, notes, ideas, suggestions, or thoughts regarding the project, project stage, or key milestone, or the post-mortem.