Post-mortem analysis of past projects

Introduction:

A Post-Mortem is analysis of what happened with a project, normally a project that went seriously wrong. With seriously wrong we mean that either a complain from the Client was received or that a severe disruption in the company operations was caused (e.g. long hours of overtime worked to prevent a major complaint from the Client).

In a way, doing a Post-Mortem is like doing a Forensics analysis, going step by step to find out where things went wrong and learn why.

The goal is to be able to explain the complete history of the project, learn lessons from it and cement these lessons in an improvement plan.

Step 1: Information gathering

The first step involves using both the e-mail and Plunet to gather information about the project.

The list below is a set of guidelines of what to look for when doing an investigation. Please feel free to add any other source of information you may find relevant.

During this whole process you should be taking notes of anything you find important or interesting. The critical information is spread across several sources (e-mails, chats, Plunet, even people's memories) so it's important to record this information in an ordered manner.

1. **Find the e-mail thread with the Client and read it from the very first e-mail to the last (including complaint e-mails). Take notes on the following:**
   a. What material did they send? Did they send more material after the project's start? If so, was this planned?
   b. Did the project have special instructions? Did the client send more instructions after the project was officially launched? If there is a complaint, is it related to not following special instructions?
   c. Did the Project Manager ask questions? Where the questions answered? Would you consider the answers received clear and apropriate? If an answer was unclear, did the Project Manager ask again by re-phrasing the question?
   d. Was the project delivered on time? If there was a delay, was it notified to the client? With how much anticipation was the delay informed?
   e. Was there a complain? If so, what was it about?
2. **Go to Plunet and find out the following**
   a. What material was sent to the Resources?
   b. What instructions were sent to the Resources?
   c. Did the Resources deliver on time?
   d. Did the project have a step (other than QA) performed internally?
   e. How much time was planned for QA?
   f. Was our delivery on Plunet maked as On time?

g. Does the project have a healthy margin? (around 25%-30% minimum)

3. **Find the e-mail thread with the <u>Resources</u> and find out the following:**
    a. Did they ask any questions? Were these questions answered?
    b. Was there a discussion about issues with the delivery?
    c. Was there a discussion about instructions not followed?
    d. Where there technical issues of any kind?
    e. Did the Resource complain about anything? How was the complain adressed?
4. **Go to Skype and backtrack to the day of the delivery. Was there any conversation related to the project?**

<u>Step 2: Initial Information analysis</u>

Follow all the steps of the workflow from the point the project was sent all the way to the delivery and after the delivery.

Look for things missing, missunderstood, improperly planned, issues during production, complains, technical issues, etc.

Pay special attention to issues and look for their point of origin. Here is an example to illustrate it:

"A client is complaining about our delivery, claiming that part of the instructions were not followed. You track down the client's e-mail and find out that we did receive the instruction, but the person in charge of sending the project did not relay the instructions to the translation team. This person didn't receive the instructions from the PM either." In this example the root cause of the issue is the PM not relaying the instructions to the production team.

At the end of this step you should have a clear understanding of the project and have an hipotesis of what went wrong.

<u>Step 3: Interview</u>

Talk to the people involved in the project in a non-judgemental way and ask them questions. About the project's difficulties and the potential issues you detected.The idea is to add details to your initial analysis.

- Ask them to tell you what was the project like.
- What did they receive from whom, and what did they send to the resources in charge of the following steps?
- What difficulties did they find in the project?

- Do they consider there was something missing that prevented them from completing their task succesfully?
- Does the person agree or disagree with your initial analysis on the root cause of the issues? If not, why?
- What would they do to change things in the future?

Step 4: Post-mortem report

Write a report that contains the following items:

1. A short summary of the project
2. A table containing the following
    a. Issue
    b. Source of the issue (Client, Australis or Resource)
    c. Impact
3. Lessons learned
4. Corrective actions for the future

Step 5: present the report in front of the team

We all need to learn from mistakes.Schedule a meeting to share the report with the entire team. While presenting your findings, please refrain to indentifying specific team members.. If people feels attacked or ashamed, they will turn to a defensive mindset instead of keeping the open mind that is needed to learn, and the objective won't be achieved.

By the end of the persentation we should all learn to do our job a bit better and continue being the best option for our clients ☺.