**Post-Implementation   
Review of Business Outcomes**

Template



Version 1.7, September 2021

# Using This Template

To create a deliverable from this template:

* Delete the template title page (previous page) and this page.

Replace [bracketed text] on the cover page (next page) with your project and agency information and add to document

To create a deliverable from this template:

1. Delete the template title page (previous page) and this page.
2. Replace [bracketed text] on the cover page (next page) with your project and agency information.
3. Replace [bracketed text] in the tool header area at the top of page i (Contents page) with the same project and agency information as on the cover page.

Note: Please do not remove or modify content in the footer area.

1. Complete the entire template. Each section contains abbreviated instructions, shown in italics, and a content area. The content area is marked with a placeholder symbol (=>) or with a table. Relevant text from other project deliverables may be pasted into content areas.

Note: Please do not remove the italicized instructions.

1. Update the table of contents by right-clicking and selecting “Update Field,” then “Update entire table.”

Texas Project Delivery Framework

Post-Implementation Review   
of Business Outcomes



[Agency/Organization Name]

[Project Name]

|  |  |
| --- | --- |
| Version: [Version Number] | Revision Date: [Mm/Dd/Yy] |

According to Texas Government Code Chapter 2054.307, agency head or designee approval is required. Digital signatures are acceptable.Approval of the Post-Implementation Review of Business Outcomes indicates an understanding and acceptance of the post-implementation results described in this deliverable. By approving this deliverable, the agency head or designee agrees the information accurately conveys project delivery results and is ready to be forwarded to the Quality Assurance Team.

|  |  |  |
| --- | --- | --- |
| Agency Head or Designee | | |
| [Name] | [Email] | [Telephone] |
| Signature: | | Date mm/dd/yy: |

Agencies may add additional signatories depending on internal project management governance.

|  |  |  |
| --- | --- | --- |
|  | | |
| [Name] | [Email] | [Telephone] |
| Signature: | | Date mm/dd/yy: |

|  |  |  |
| --- | --- | --- |
|  | | |
| [Name] | [Email] | [Telephone] |
| Signature: | | Date mm/dd/yy: |

|  |  |  |
| --- | --- | --- |
|  | | |
| [Name] | [Email] | [Telephone] |
| Signature: | | Date mm/dd/yy: |

|  |  |  |
| --- | --- | --- |
|  | | |
| [Name] | [Email] | [Telephone] |
| Signature: | | Date mm/dd/yy: |

Contents

[Section 1. Project Impact on Agency Objectives 1](#_Toc213489546)

[1.1 Product and/or Service Performance 1](#_Toc213489547)

[1.2 Goals and Objectives 1](#_Toc213489548)

[Section 2. Quantitative and Qualitative Benefits 1](#_Toc213489549)

[2.1 Statutory Fulfillment 1](#_Toc213489550)

[2.2 Strategic Alignment 2](#_Toc213489551)

[2.3 Agency Impact Analysis 3](#_Toc213489552)

[2.4 Financial Analysis 4](#_Toc213489553)

[Section 3. Project Outcomes 5](#_Toc213489554)

[3.1 Project Quality 5](#_Toc213489555)

[3.2 Scope 5](#_Toc213489556)

[3.3 Cost (Budget) 6](#_Toc213489557)

[3.4 Schedule 6](#_Toc213489558)

[Section 4. Agency and State Lessons Learned 6](#_Toc213489559)

[Section 5. Future Review Plans 7](#_Toc213489560)

[Section 6. Glossary 7](#_Toc213489561)

[Section 7. Revision History 7](#_Toc213489562)

[Section 8. Appendices 7](#_Toc213489563)

# Section 1. Project Impact on Agency Objectives

## 1.1 Business Objectives and Benefits

Based on actual performance measurement results, describe the project’s impact on the agency’s ability to meet the business goals and objectives described in the Business Case section 1.7 and refined in the Business Objectives and Expected Benefits. If the stated business goals and objectives were not met, include factors that inhibited performance in the project impact description.

| Business Objectives  (What does the project need to accomplish?) | Describe how the project met or did not meet the Expected Benefits | Project Outcome Measures (How will you know you succeeded?) | Actual Results (if too early to collect results, indicate revised date and any revision in estimate) |
| --- | --- | --- | --- |
| Example (Please Delete): Allow for citizen access to submit an application 24/7 reducing the need for data entry clerks. |  | System availability target 24/7 with 99.9% uptime.  3 FTE reassigned duties from data entry to other higher need tasks. |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Section 2. Quantitative and Qualitative Benefits

## 2.1 Statutory Fulfillment

For each of the factors identified and described in theEvaluation Factors tab of the Business Case Workbook, and shown below, describe the project’s impact on the agency’s ability to fulfill statute and other mandates. If a value factor is not applicable to the project, state “not applicable.” If applicable, include reasons that inhibited achieving the expected benefit in the project impact description.

| # | Value Factor | Project Impact to Business Outcome |
| --- | --- | --- |
| 1 | The project is implemented to satisfy a direct mandate or regulation (state, federal, national, international) |  |
| 2 | The project is implemented to satisfy a derived mandate or regulation (state, federal, national, international) |  |
| 3 | Implementing the project improves the turnaround time for responses to mandates or regulatory requirements |  |
| 4 | The project results in agency compliance to mandates or regulatory requirements |  |
| 5 | The project results in agency avoidance of enforcement actions (e.g., penalties) based on mandates or regulatory requirements |  |
| 6 | Implementing the project achieves the desired intent or expected outcomes of the mandates or regulatory requirements |  |
| 7 | Implementing the project imposes stricter requirements, or different or additional requirements, than those required by the mandates or regulations |  |
| 8 | Other |  |
| 9 | Other |  |
| 10 | Other |  |
| 11 | Other |  |

## 2.2 Strategic Alignment

For each of the factors identified and described in the Evaluation Factors tab of the Business Case Workbook and shown below, describe the project’s impact on the ability to deliver a technology solution aligned with the agency’s and the state’s strategic goals and objectives. If a value factor is not applicable to the project, state “not applicable.” If applicable, include reasons that inhibited achieving the expected benefit in the project impact description.

| # | Value Factor | Project Impact to Business Outcome |
| --- | --- | --- |
| 1 | The project is aligned with, and delivers business outcomes, that support agency and statewide goals |  |
| 2 | The project satisfies a strategic agency or state mission critical need, regardless if required by a mandate or regulation |  |
| 3 | The project results in the ability of the agency or state to better share resources with other agencies or states as part of a long-term strategic alignment effort |  |
| 4 | The project is aligned with the overall mission of the agency and state |  |
| 5 | The project strategically consolidates and streamlines business practices and administrative processes |  |
| 6 | The project is aligned with the overall vision of the agency and state |  |
| 7 | The project is aligned with the overall priorities of the agency and state |  |
| 8 | Other |  |
| 9 | Other |  |
| 10 | Other |  |
| 11 | Other |  |

## 2.3 Agency Impact Analysis

For each of the factors identified and described in the Evaluation Factors tab of the Business Case Workbook and shown below, describe the project’s impact on the ability to deliver a technology solution that supports the agency’s architecture and standards. If a value factor is not applicable to the project, state “not applicable.” If applicable, include reasons that inhibited achieving the expected benefit in the project impact description.

| # | Value Factor | Project Impact to Business Outcome |
| --- | --- | --- |
| 1 | The project results in systems which support the defined architecture/standards for the agency and state |  |
| 2 | The project results in systems which reduce or eliminate redundant systems |  |
| 3 | The project results in systems which enable reuse of code/components available from other state or federal agencies |  |
| 4 | The project results in systems which improve consistency between systems within the agency through standardization |  |
| 5 | The project results in systems which leverage the technical capability of commercial-off-the-shelf (COTS) software packages |  |
| 6 | The project results in systems which provide the ability to evolve as new technologies emerge |  |
| 7 | Other |  |
| 8 | Other |  |
| 9 | Other |  |
| 10 | Other |  |

## 2.4 Financial Analysis

For each of the factors that represent the project’s quantitative benefits, identify and quantify the benefits realized to date. Provide a forecast of the benefits not yet realized. Identify the specific time period (mm-yy) encompassed by the realized and forecasted benefits. If a factor is not applicable to the project, state “not applicable.”

| Realized Time Period mm/dd/yy | | | Forecasted Time Period mm/dd/yy | | |
| --- | --- | --- | --- | --- | --- |
|  | to |  |  | to |  |

| # | Value Factor | Realized Amount mm/dd/yy | Forecasted Amount mm/dd/yy |
| --- | --- | --- | --- |
| Identify Cumulative Savings | |  |  |
| 1 | Reduced IT and non-IT FTE costs including fringe benefits |  |  |
| 2 | Reduced IT and non-IT contractors/consultants |  |  |
| 3 | Reduced outsourced labor costs |  |  |
| 4 | Improved workflow/business processes |  |  |
| 5 | Reduced error rate |  |  |
| 6 | Reduced hardware maintenance/upgrade expense |  |  |
| 7 | Reduced software maintenance/upgrade expense |  |  |
| 8 | Reduced facilities rental/maintenance expense |  |  |
| 9 | Reduced equipment rental/supplies and materials expense |  |  |
| 10 | Other |  |  |
| Identify Cost Avoidance | |  |  |
| 11 | Avoid penalties |  |  |
| 12 | Avoid loss of funding |  |  |
| 13 | Improved enforcement actions |  |  |
| 14 | Asset protection |  |  |
| 15 | Other |  |  |
| Identify Revenue Generation | |  |  |
| 16 | Additional revenue generated |  |  |
| 17 | Increased interest earned |  |  |
| 18 | Other |  |  |
| Identify Constituent Project Benefits | |  |  |
| 19 | Reduced constituent transaction costs |  |  |
| 20 | Reduced service delivery cycle time |  |  |
| 21 | Increased service availability/accessibility |  |  |
| 22 | Other |  |  |
| 22 | Expansion of services |  |  |
| 23 | Reduced (paper) reporting requirements |  |  |
| 24 | Improved ability to locate regulatory requirements |  |  |
| 25 | Improved accountability/compliance |  |  |
| 26 | Greater consistency in constituent/state transactions |  |  |
| 27 | Other |  |  |
| General Questions Regarding Financial Forecast: | |  |  |
| 28 | Will the Net Present Value exceed 0? If so, by how much? |  |  |
| 29 | When is the expected Project Breakeven Point? |  |  |
| 30 | What is the project’s expected Return on Investment? |  |  |

# Section 3. Project Outcomes

## 3.1 Project Quality

### 3.1.1 Quality Standards

Summarize the overall project quality, including the impact on business outcomes, based on an assessment of whether the project satisfied the quality standards defined for the project in the Quality Register or Quality Assessment Surveilance Plan. (Include description of results of UAT, Go-Live, End-User Acceptance here.)

=>

### 3.1.2 Methodologies

Summarize which aspects of the planned methods identified in section 1.2 of the Business Case (reference table below) were used and explain the impact of using or not using each method on project outcomes, including the impact of using the defined project life cycle methodology, project management methodology, systems development methodology, or other methodologies on project outcomes.

|  |
| --- |
| Project/Product Methodology |
| Agile/Iterative  Waterfall  Hybrid  Other – Please Describe: |

=>

## 3.2 Scope

Summarize the impact of any changes to the initial project scope on business outcomes, including approved and non-approved changes.

=>

## 3.3 Cost (Budget)

Identify the initial estimated and final project costs.

| Project Item | Report to Date |
| --- | --- |
| Initial  Estimated Project Cost |  |
| Project Cost to Date (Total) |  |

Summarize the impact of any changes to the initial project cost on business outcomes, including approved and non-approved changes.

=>

## 3.4 Schedule

Identify the initial planned project start and finish dates. Identify the final project start and finish dates.

| Project Item | Report to Date | | |
| --- | --- | --- | --- |
| Initial Planned Project Start and Finish Dates mm/dd/yy |  |  |  |
| Final Project Start and Finish Dates mm/dd/yy |  | Baseline Date mm/dd/yy |  |

Summarize the impact of any changes to the initial schedule baseline on business outcomes, including approved and non-approved changes.

=>

# Section 4. Agency and State Lessons Learned

State lessons learned in terms of a problem (issue). Describe the problem or Best Practice and include any agency/state-level references (e.g., Governance Handbook, Business Continuity Plan, Texas Project Delivery Framework tool) that provide additional details. Identify recommended improvements to correct a similar problem in the future, including assignment for communication and follow-up about the improvement.

| Problem Statement | Problem Description | References | Recommended Change | Assigned To |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# 

| Best Practice | Description | References | Recommendation |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Optional: Nominate project to be highlighted in QAT Annual Report. Describe why this project is considered successful e.g., used innovative component(s), overcame major issue(s), exceeded end-user expectations, received positive customer satisfaction survey results.

=>

# Section 5. Glossary

Define all terms and acronyms required to interpret the Post-Implementation Review of Business Outcomes properly.

=>

# Section 6. Revision History

Identify changes to the Post-Implementation Review of Business Outcomes.

| Version | Date mm/dd/yy | Name | Description |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Section 7. Appendices

Include any relevant appendices.

=>