Project Post-Mortem Checklist: The Bridge to Better

At **TheOwnersProject.com**, *we believe a project isn't truly finished until its value has been fully extracted. The **Project Post-Mortem Checklist** (along with the "Lessons Learned" session) is the strategic bridge between closing out your current project and ensuring the next one is executed with even greater precision. It is a structured process designed to capture "institutional knowledge" so that you never pay for the same mistake twice.*

This checklist moves beyond simple task completion to analyze the "why" behind your project's performance across five critical dimensions:

The Five Pillars of the Post-Mortem

- **The "Big Picture" Review:** *We evaluate if the project actually achieved the original **Owner's Project Requirements (OPR)** and investigate the root causes of any **Scope Creep**.*
- **Timeline & Schedule:** *We perform a "Planned vs. Actual" analysis to identify specific **bottlenecks**—such as permit delays or vendor lag—and determine if automation could have shortened any phases.*
- **Financial Performance:** *We scrutinize the final budget against the original estimate, itemizing every **unforeseen cost** to see if the project met your target profit margins.*
- **Team & Communication:** *We assess **Resource Management** to ensure the right people were in the right seats and identify where communication silos may have hindered the flow of information.*
- **Risk & Problem Solving:** *We compare anticipated risks against the surprises that actually occurred, evaluating how effectively our **"Plan Bs"** resolved those issues.*

The "Owner's Project" 3-Step Ritual
A checklist is only data; our 3-step ritual turns that data into an organizational asset:

1. **The Meeting:** *We host a 45-minute **"No-Blame" session** with key team members to encourage honest feedback.*
2. **The "Start/Stop/Keep" List:** *We define exactly what the team should **Start** doing for efficiency, **Stop** doing to prevent loss, and **Keep** doing because it worked.*
3. **The SOP Update:** *We take those lessons and immediately update your **Standard Operating Procedures** so that the improvement is permanently "baked into" your business operations.*

By institutionalizing this process, you ensure that your organization becomes more resilient and profitable with every project it completes.

*In the world of project management, a **Post-Mortem** (or "Lessons Learned" session) is the bridge between finishing one project and doing the next one better. It's about capturing "institutional knowledge" so the owner doesn't pay for the same mistake twice.*

PROJECT POST-MORTEM CHECKLIST

Project: _____ **Completion Date:** _____ **Lead:** _____

1. The "Big Picture" Review
- [ ] **Goal Alignment:** Did we achieve the original "Owner's Project Requirements" (OPR)?
- [ ] **Final Deliverables:** Is the client/owner 100% satisfied with the quality of the hand-off?
- [ ] **Scope Creep:** Did the project grow beyond the original plan? Why?

2. Timeline & Schedule
- [ ] **Planned vs. Actual:** Compare the original milestone dates to the actual completion dates.
- [ ] **Bottlenecks:** Identify the specific points where the project stalled (e.g., permit delays, vendor lag, internal indecision).
- [ ] **Efficiency:** Could any phase have been shortened with better automation or preparation?

3. Financial Performance
- [ ] **Final Budget vs. Estimate:** Are we over or under? By what percentage?
- [ ] **Unforeseen Costs:** List every expense that wasn't in the original budget.
- [ ] **Profitability:** After accounting for all labor and overhead, did this project meet our margin goals?

4. Team & Communication
- [ ] **Resource Management:** Did we have the right people in the right seats?
- [ ] **Information Flow:** Did stakeholders feel "in the loop," or were there communication silos?
- [ ] **Hand-offs:** Were the transitions between departments or subcontractors smooth?

5. Risk & Problem Solving
- [ ] **Anticipated Risks:** Did the risks we identified in the Feasibility stage actually happen?
- [ ] **Surprises:** What happened that we *never* saw coming?
- [ ] **Resolution:** How effective were our Plan Bs?

"The Owner's Project" Action Plan - *The checklist is useless if the data isn't used.*

Setup this 3-Step Ritual:
1. ***The Meeting:*** *Host a 45-minute "No-Blame" session with the key team members.*
2. ***The "Start/Stop/Keep" List:***
   - *What should we **START** doing next time?*
   - *What should we **STOP** doing immediately?*
   - *What worked so well we must **KEEP** doing it?*
3. ***The SOP Update:*** *Take the "Lessons Learned" and immediately update your Standard Operating Procedures so the improvement is "baked into" the business.*