Post-Mortem Process
Template

1) Identify stakeholders for meeting:

- Owner?
- Architect/Design Team?
- Project Manager?
- Site Supervisor/Lead Carpenter?
- Other Consultants? (i.e. Int. Designer, Engineer, Energy Consult, etc. discuss compensation for participation??)
- Anyone else?

2) Identify others from which to gather feedback via a survey, email, or conversation?

3) Schedule a Post-Mortem meeting

- Determine length of time (2-6 hours?) virtual or in person?
- Determine facilitator(s)
- Draft agenda and goals
- Schedule and confirm participants
- Determine if there is pre-work/homework required
- Gather documents for preparation including:
  - Plans
  - Specs
  - Pre-mortem notes (did the problems you anticipated arise?)
  - Schedule (with baseline saved for history)
  - Job cost and profitability reports
  - Client feedback (if not present for meeting)
  - Refer to project close out questionnaire/evaluation?

4) Sample Agenda for Post-Mortem meeting:

- Welcome and review meeting goals and objectives
- Check ins (could ask people to name something they are excited to get out of the process?)
- Present overview of Post-Mortem process – what does it entail and why we do it
  - Q & A about Post-Mortem process
- Present overview of project in question

- - Q & A about project in question
- Confirm how to prioritize aspects below for discussion:
  - Client experience and satisfaction?
  - Quality
  - Performance & sustainability
  - Budget and profitability
  - Schedule
  - Team dynamics and experience; alignment with company values, etc.
  - Relationships with trade partners, consultants, community
  - Anything else?
- Spend remaining time discussing strategies for mitigating similar problems and challenges on the next project. Come up with clear plan with next steps for each challenge
- Talk about what worked well and how to make sure to replicate that again
- Identify specific next steps from the meeting and accountability plan for follow through.
- Close out and evaluate the post-mortem meeting for future improvement.