**POST-MORTEM PRE-MEETING QUESTIONNAIRE**

**AND MEETING AGENDA TEMPLATE**

POST-MORTEM PRE-MEETING QUESTIONNAIRE

**Before the meeting:** Answer these questions to prepare for the discussion. Think about the processes and procedures that were used during the project. In addition, consider the schedule and management of the project.

SUCCESSES

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| What worked well? List the successes in the order of their impact on the project. |
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|   |
| Why did these processes/procedures work? |
|   |
|   |
| How can we repeat these successes in future projects? |
|   |

ISSUES

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| What didn’t work well? List these issues in the order of their impact on the project. |
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| Why didn't these processes/procedures work? |
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| How can we avoid these issues in future projects? |
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POST-MORTEM MEETING AGENDA

Remove or replace informational text before sending your agenda to meeting attendees.

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| **MEETING INTRODUCTION AND OVERVIEW**  | TIME: | 3 min |
| Cover the ground rules, and remind the group that the meeting is meant to be a constructive discussion. You will help set the outlook of the group and get people feeling comfortable and safe. Open on a positive note, with a joke or a great success from the project. This should last a few minutes. |
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| **PROJECT OUTCOME AND RECAP** | TIME: | 5 min |
| Share a synopsis of the project and the initial expectations. Then, compare the outcome of the project with the expectations. This should last a few minutes. |
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| **DISCUSSION OF SUCCESSES AND ISSUES** | TIME: | 20 min |
| Create a timeline of the project, including the major milestones. Go around the room and ask everyone for their most important success. Add each instance of success above the timeline. If there’s enough time, allow everyone to offer their next most important success.Repeat the process above, this time discussing issues instead of successes. Add each instance of an issue below the timeline. Discuss the successes and issues, and create action items based on them. Assign owners to each action item.This should take up most of the scheduled time. |
|   |  |
| **WRAP UP** | TIME: | 2 min |
| Thank everyone for their participation and input. Recap what you’ve leaned, and give a time frame for when you’ll follow up with your action plan. Close on a positive note.This should last a few minutes. |

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