**SAMPLE PROJECT SUCCESS CRITERIA TEMPLATE**

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| **PROJECT TITLE** |
|  First Master’s Program Cohort |
| **MODERATOR** | **DATE PREPARED** |  |
|  Sally Smith |  May 12th |  |
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| PROJECT OVERVIEW |
| What were the original goals and objectives of the project? |
|  To recruit and maintain 20 graduate students in the new master’s level program. |
| What were the original criteria for project success?  |
|  To enroll 100 percent of our target cohort size and have a graduation rate of at least 80 percent. |
| Was the project completed according to the original expectation? |
|  We enrolled 20 students, but the graduation rate was 70 percent, with 14 students completing the program. |
| Additional Comments |
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| PROJECT HIGHLIGHTS |
| What were the major accomplishments? |
| Meeting our initial enrollment goal was a big accomplishment, considering that this is a new program without an established reputation or significant word-of-mouth referrals.  |
| What methods worked well? |
| Online marketing generated the greatest returns, with 80 percent of students reporting that they found out about the program via our website and/or targeted search ads. The majority of students who enrolled also participated in introductory phone calls or in-person events. |
| What was found to be particularly useful for accomplishing the project? |
| Focusing resources on marketing, providing one-on-one information sessions with prospective students, and soliciting feedback from students throughout the program.  |
| Additional Comments |
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| PROJECT CHALLENGES |
| What elements of the project went wrong?  |
| Four of the students who left the program early complained of program issues related to disorganization, unclear communication, and feeling misled about expectations. Two students left the program for either personal or financial reasons. |
| What specific processes need improvement? |
| This is a new program combining academic and experiential methods. These methods need to be communicated clearly with prospective students who may be accustomed to more traditional academic settings. Some communication gaps between faculty and staff resulted in last-minute schedule changes and other changes that impacted student experience. |
| How can these processes be improved in the future? |
| * Modify the informational materials for prospective students in order to emphasize program methods and what to expect.
* Increase faculty and staff meetings.
* Communicate possible schedule changers to students in advance and provide detailed explanation for how changes will be handled.
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| What were the key problems areas (i.e., budgeting, scheduling, etc.)? |
| * Advance preparation for possible schedule changes or other issues.
* Inconsistent communication at different levels or program.
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| List any technical challenges. |
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| Additional Comments |
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| POST-PROJECT TASKS / FUTURE CONSIDERATIONS |
| List any continuing development and maintenance objectives. |
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| What actions still need to be completed, and who is responsible for completing them? |
| * John Doe will adjust the marketing materials to reflect the changes mentioned above.
* Alex Bee will provide training for recruiters to ensure that they cover certain talking points in one-on-one sessions.
* Alice Smith will manage the meeting calendar and ensure that notes are distributed to all attendees.
* Bruce Jones will facilitate a program meeting to discuss organizational issues and goals for the program moving forward.
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| List any additional outstanding project items. |
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| Additional Comments |
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| PLANNING PHASE |
| **LESSON LEARNED** | **ACHIEVED?** | **COMMENTS** |
| The project plans and scheduling were well documented, complete with adequate structure and detail.  | Y |   |
| The project schedule contained all elements of the project.  | Y |   |
| The tasks were clearly defined. | Y |   |
| The stakeholders had adequate input in the planning process.  | Y |   |
| The requirements were gathered and clearly documented.  |  |   |
| The criteria were clear for all phases of the project. |  |   |
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| Additional Comments |
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| EXECUTION |
| **LESSON LEARNED** | **ACHIEVED?** | **COMMENTS** |
| The project reached its original goals.  | N | We achieved enrollment, but had a high dropout rate. |
| Unexpected changes that occurred were of manageable frequency and intensity.  | Mixed | These changes may have contributed to the departure of students. We need to streamline and standardize processes for managing change. |
| Project baselines (i.e., time, scope, and cost) were thoughtfully managed.  | Y | The budget planned for the possibility of low enrollment or retention. |
| Fundamental project management processes (i.e., risk and issue management) were efficient.  | Y |   |
| Project progress was tracked and reported in an accurate, organized manner.  | Y |   |
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| Additional Comments |
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| HUMAN FACTORS |
| **LESSON LEARNED** | **ACHIEVED?** | **COMMENTS** |
| The project manager reported to the appropriate parties. | Y |   |
| Project management was effective. | Mixed |   |
| The project team was organized and adequately staffed. | –– | This issue requires further review. |
| The project manager and team received proper training.  | N | We now see gaps in training that will be provided to recruiters and academic counselors. |
| There was efficient communication among project team members. | N | See sections above for comments on improving communication. |
| Functional areas collaborated effectively.  | Y |   |
| Conflicting goals did not cause interdepartmental problems.  | Y | This program is not in conflict with our other programs. |
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| Additional Comments |
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| OVERALL |
| **LESSON LEARNED** | **ACHIEVED?** | **COMMENTS** |
| The original cost projections were accurate.  | Y |   |
| Student needs were met.  | Mixed | When surveyed, most students recommended some improvement in program organization and communication. Students who chose to complete the program reported overall satisfaction with the information covered, academic rigor, etc.  |
| The objectives of the program were met.  | Mixed |   |
| The objectives of the university were met.  | Y | We successfully completed the first cohort and learned lessons that will help us continue to build the program. |
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| Additional Comments |
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| PROJECT CLOSE ACCEPTANCE |
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| **PROJECT MANAGER NAME** | **DATE** | **PROJECT MANAGER SIGNATURE** |
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| **SPONSOR NAME** | **DATE** | **SPONSOR SIGNATURE** |
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