[Name of Customer Agency]

Lessons Learned Report

[Program Name]

Version 1.0

[Day, Month, Year]

Document History

|  |  |  |  |
| --- | --- | --- | --- |
| Release No. | Date | Author | Revision Description |
| 1.0 |  |  | Initial Draft Version |
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I have carefully assessed the Lessons Learned Reportforthe *<<INSERT NAME OF PROGRAM>>.* This document has been completed in accordance with the requirements of the Office of Shared Solutions and Performance Improvement (OSSPI) Guidance.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

\_\_\_\_\_\_ The document is accepted.

\_\_\_\_\_\_ The document is accepted pending the changes noted.

\_\_\_\_\_\_ The document is not accepted.

We fully accept the content within this project artifact and associated tasks.

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*<<Insert Name>> <<Insert Date>>*

*<<Insert Title>>*

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*<<Insert Name>> <<Insert Date>>*

*<<Insert Title>>*

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# Purpose of Plan

<<This document should be reviewed and approved by both the Provider and the Customer Program Manager.

*The Lessons Learned Report should be completed during the Stabilization and Operations phase of a migration. It enables customer and provider agencies to gather input on ways to improve each phase of the migration lifecycle process. The information collected in this report will provide guidance for future migrations.*

*The customer and provider agencies should discuss the Lessons Learned Report together. OSSPI will review the customer and provider agencies’ submissions and share key lessons learned with each agency in order to leverage applicable lessons learned for future migrations. Lessons learned about the migration process with OSSPI should also be included.*

*The Lessons Learned Report uses a “Start, Stop, Continue” methodology to collect and report on lessons learned during the migration process. The definitions are as follows:*

* **Start:** Describe practices and/or processes that should begin going forward. Explain why these are needed and what they are changing. This section should address next steps and recommendations.
* **Stop:** Describe practices and/or processes that should not be continued going forward. Explain why these occurred and why they should stop.
* **Continue:** Describe practices and/or processes that should continue unchanged going forward. Explain why these are effective.

*The knowledge areas on the template are illustrative. Customer and provider agencies should only populate fields with applicable lessons learned.>>*

# Lessons Learned Report

*<<Use the following table to develop the Lessons Learned Report. Provide a brief project overview, and describe practices and/or process that should be implemented in future migrations, should not be continued in future migrations, and should continue unchanged in future migrations. This report should include lessons learned from all phases of the migration, as well as lessons learned regarding the migration process with OSSPI.>>*

|  |
| --- |
| Project Overview |
| Date | *<<Enter the Date (mm/dd/yy) Lessons Learned were recorded>>* |
| Project Name | *<<Enter the project name>>* |
| Customer Agency Name (include point of contact) | *<<Enter customer agency name, point of contact, and contact information>>* |
| Provider Agency Name (include point of contact) | *<<Enter provider agency name, point of contact, and contact information>>* |
| Submitted By | *<<Enter the name of the stakeholder(s) submitting the report>>* |
| Project Description | *<<Enter a brief description of the project, including services being migrated>>* |
| Lessons Learned |
| Knowledge Area | **Start** | **Stop**  | **Continue** |
| Scope | *Describe a practice or process that should be implemented in future migrations. Provide an explanation.*  | *Describe a practice or process that should not be continued in future migrations. Provide an explanation.* | *Describe a practice or process that should continue unchanged in future migrations. Provide an explanation.* |
| Schedule |  |  |  |
| Leadership and Management |  |  |  |
| Budget |  |  |  |
| Stakeholder Management |  |  |  |
| Change Management and Communications |  |  |  |
| Risk Management |  |  |  |
| Resources |  |  |  |
| Governance |  |  |  |
| Project Management |  |  |  |
| Working Sessions |  |  |  |
| Logistics |  |  |  |
| Design, Development, Data Management |  |  |  |
| Testing |  |  |  |
| Training |  |  |  |
| Business Process Design |  |  |  |
| Post-Implementation Support |  |  |  |
| Other |  |  |  |

**Table 1: Lessons Learned Report**

# Appendix A: Key References

*<<Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.>>*

Table below summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| Document Name | Description | Location |
| *<<Document Name and Version Number>>* | *<<Document description>>* | *<<URL to where document is located>>* |
|  |  |  |
|  |  |  |

**Table 2: Key References**

# Appendix B: Key Terms

Table below provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

|  |  |
| --- | --- |
| Term | Definition |
| *<<Insert Term>>* | *<<Provide definition of term and acronyms used in this document>>* |
|  |  |
|  |  |

**Table 3: Key Terms**