**[Type the company name]**

26 August 2009

**End Stage Report**

**PRINCE2 End Stage Report**

**Joe Smoe**

End Stage Report

# Purpose

An End Stage Report is used to give a summary of progress to date, the overall project situation, and sufficient information to ask for a Project Board decision on what to do next with the project.

The Project Board uses the information in the End Stage Report in tandem with the next Stage Plan to decide what action to take with the project: for example, authorize the next stage, amend the project scope, or stop the project.

(Where the End Stage Report is being produced at the end of the initiation stage, not all of the content may be appropriate or necessary).

# Derivation

The End Stage Report may be derived from the following:-

* Current Stage Plan and actuals
* Project Plan
* Benefits Review Plan
* Risk Register, Quality Register and Issue Register
* Exception Report (if applicable)
* Lessons Report
* Completed/slipped Work Packages
* Updated Business Case

# Quality criteria

What makes a excellent End Stage Report.

* The report clearly shows stage performance against the plan
* Any abnormal situations are described, together with their impact
* Any appointed Project Assurance roles agree with the report

# Tailoring

It is a principle that a PRINCE2 project tailors the method to suit its needs. Tailoring refers to the appropriate use of PRINCE2 on any given project, ensuring that there is the correct amount of planning, control, governance and use of the management products.

You may find it necessary to tailor this template up or down to meet the needs of your project. For everyone involved in the project, it should remain clear as to what the purpose of this management product is, what it should comprise and what the quality criteria are.

This template could quite easily be reduced to a 2 or 3 page document if required.

# Project Managers Report

*Project Manager to Summarizing the stage performance.*

# Review of the Business Case

*Summarizing the validity of the project’s Business Case:*

* *Benefits achieved to date*
* *Residual benefits expected (remaining stages and post project)*
* *Expected net benefits*
* *Deviations from the approved Business Case*
* *Aggregated risk exposure.*

# Review of Stage Objectives

*Review of how the stage performed against its planned targets and tolerances.*

|  |  |  |
| --- | --- | --- |
| **Originals as stated in the Stage Plan** | Actual | Deviation +/- |
| Time: xxx days |  |  |
| Cost: £xxx |  |  |
| Tolerances:- |  |  |
| Time: |  |  |
| Cost: |  |  |
| Scope: |  |  |
| Quality: |  |  |
| Benefit: |  |  |
| Risks: |  |  |

# Review of Team Performance

*To include internal and external resources and in particular, providing recognition for good performance.*

# Review of Products

|  |  |  |
| --- | --- | --- |
| Quality Records[[1]](#footnote-1) | | |
| Quality Activities | Planned Date | Completed Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |
| --- | --- |
| Approval Records[[2]](#footnote-2) | |
| Product | Requisite Approvals |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| Off Specifications[[3]](#footnote-3) | |
| Product | Concession Granted (yes/no) |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Phased handover (if applicable)[[4]](#footnote-4) | | | |
| Product | Signature | Name | Date |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Summary of follow-on action recommendations

*Request for Project Board advice about who should receive each recommended action. The recommended actions are related to unfinished work, ongoing issues and risks, and any other activities needed to take the products to the next phase of their life.*

# Lessons

*A review of what went well, what went badly, and any recommendations for corporate or programme management consideration.*

|  |  |  |
| --- | --- | --- |
| **Lesson Type** | **Lesson Detail** | **Logged By** |
|  |  |  |
|  |  |  |
|  |  |  |

# Issues and Risks

*Summary of the current set of issues and risks affecting the project.*

|  |  |  |
| --- | --- | --- |
| Type | Date Raised | Description and details |
|  |  |  |
|  |  |  |
|  |  |  |

**Type**: Problem or concern; RFC (Request for Change); Off-specification or Risk

# Forecast

*The Project Manager’s forecast for the project and next stage against planned targets and tolerances for time, cost, quality, scope, benefits and risk.*

|  |  |
| --- | --- |
| Elements | Forecast |
| Time: xxx days |  |
| Cost: £xxx |  |
| Tolerances:- |  |
| Time: |  |
| Cost: |  |
| Scope: |  |
| Quality: |  |
| Benefit: |  |
| Risks: |  |

# Supporting Information

[Add here any supporting information, such as comments, charts, tables, documents or diagrams that will assist].

# End Stage Report Sections Omitted

* [Omitted section]
* [Omitted section]

# Document Distribution

|  |  |  |
| --- | --- | --- |
| **Name** | **Organization** | **Role** |
|  |  |  |
|  |  |  |
|  |  |  |

# Approvals

**Prepared By** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

([**Job Title**])

This document requires the following approvals

**Approved By** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

([**Job Title**])

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

([**Job Title**])

**Approval Date** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. This information can be copied from the Quality Register [↑](#footnote-ref-1)
2. Listing the products and their requisite approvals [↑](#footnote-ref-2)
3. Listing any missing products or products that do not meet the original requirements, and confirmation of any concessions granted [↑](#footnote-ref-3)
4. Confirmation by the customer that operations and maintenance functions are ready to receive the release [↑](#footnote-ref-4)