

RE.1

Do a project review workshop

Complex activity

The aim of this activity is to review the performance of the project and consider how future projects could be implemented more effectively and efficiently.



INPUT

- Results of the first project for eco-innovation.

OUTPUT

- Short report describing the outputs of the project review.
- Five actions that could be implemented to improve the performance of future projects.

These outputs are used in the activity *RE.2 Do a personal review* and *RE.3 Review the business model and roadmap*.

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The project review should focus on the performance of the project, the results achieved and the ways that future projects could be improved. Ultimately, you are trying to answer the questions:

- Did the project accomplish what it set out to achieve?
- What wider benefits have been generated by the project (e.g. any new knowledge and skills, new partnerships, improved gender equality or brand and public relations benefits)?
- How could future projects be managed differently to make them more successful, efficient and cost-effective?

Gathering the information you need to answer these three questions can be done efficiently through a review workshop. A suggested process for this review workshop is provided below. If you are unable to obtain the participation of the relevant personnel you will need to perform the review yourself and try to get your findings and conclusions validated by your Focal Point within the company.

HOW TO GO ABOUT IT

1. Review workshop planning

If you have not already done so, seek the permission of the CEO to perform the review workshop. Explain to the CEO that the purpose of the review workshop is to determine the results and benefits of the project and to identify ways to improve the performance of future projects for eco-innovation.

Decide on the scope of the review in terms of time period considered, which aspects of the project will be covered and who will be consulted during the review. If value chain partners have been involved in the project, it may be useful to obtain their feedback within

the review process. Gaining feedback from partners will be particularly important if they are due to be involved in subsequent projects on the roadmap as you will need to ensure that they are satisfied with the business benefits they are realising from the eco-innovation activities and remain motivated to continue with their involvement.

Whilst feedback and improvement ideas for all aspects of the project should be welcomed, it can be useful to focus attention on one or two key aspects. For instance, if the aim of the project was to develop a more sustainable packaging solution, the review might focus on the technology development process and the communication between the production process, design and marketing personnel.

Aim to complete the review soon after the completion of the project – when project team members will still be able to remember the details of the project. However, it is important to allow time for the results of the project to become clear. For example, if the project was about the development of a more sustainable packaging solution you may have to wait 3-6 months to obtain the product sales data in order to be able to evaluate the consumer acceptance of the new design.

Gather and review project documentation such as the requirements specification and the Risk Register. Also gather evidence of the results and benefits of the project e.g. data showing a reduction in the energy consumption of production processes following the introduction of a new manufacturing process.

Decide on who should participate in the review workshop. Team leaders are good candidates to involve in the review because they should have a good overview of the activities completed

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and the problems encountered. The presence of members of the Senior Management Team may inhibit some participants from providing a critical and honest review of the project and should therefore be avoided. Try to ensure a gender balanced group of participants for the review workshop.

Prepare a review form that includes no more than 10 questions about the key aspects of the project you would like to review. Send each participant a copy of the review form to complete prior to the workshop. Some basic, generic questions are:

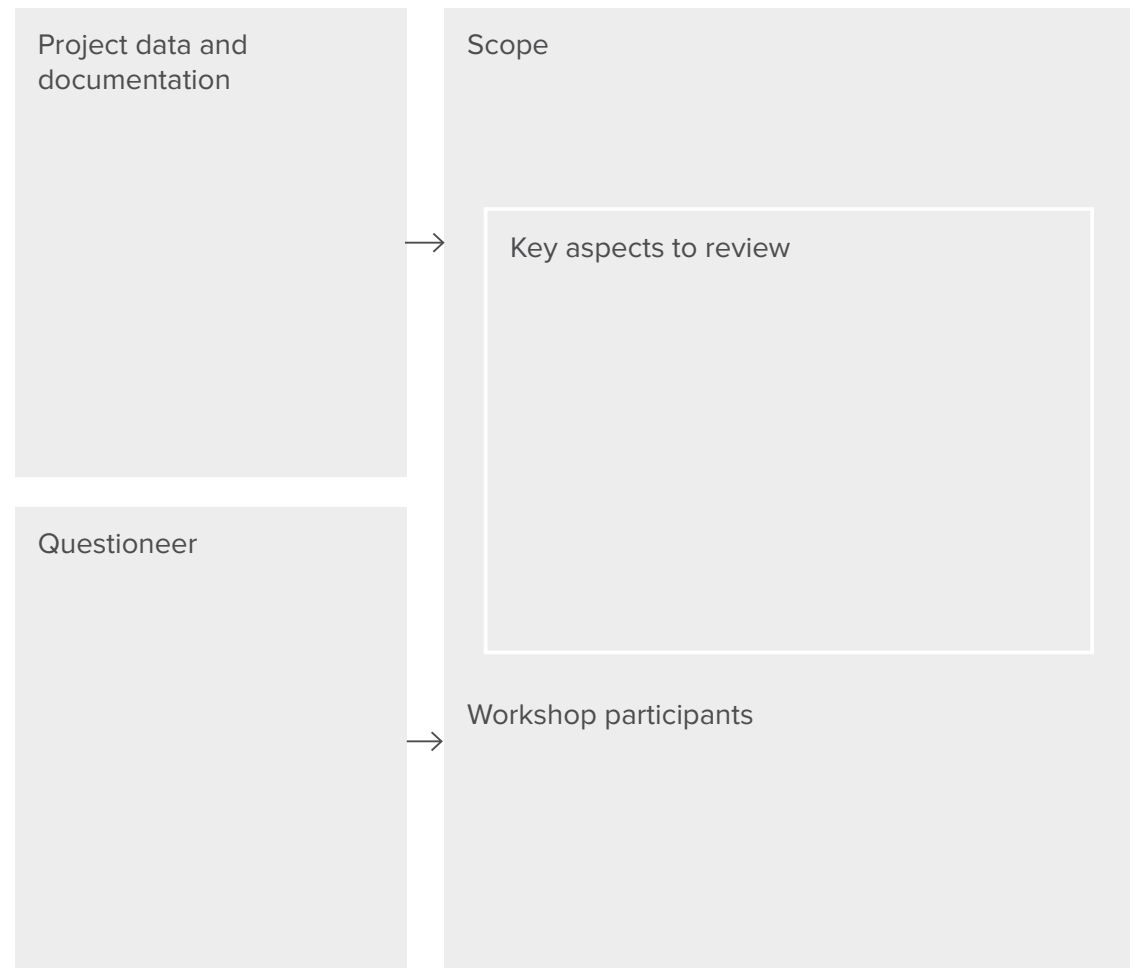
- Did the project accomplish what it set out to achieve?
- What went well within the project?
- What was challenging about the project?
- What could have been done differently?
- What wider benefits has the project generated beyond its primary scope? (e.g. any new knowledge and skills, new partnerships, improved gender equality or brand and public relations benefits)?
- What have you learned from participating in the project?

Try to develop your own more specific questions for inclusion in the review form. Ask the participants to bring their completed review forms with them to the workshop.

2. Facilitating the review workshop

Begin the workshop by explaining that the purpose of the review is to determine the results and benefits of the project and to identify ways to improve the performance of future projects for eco-innovation. Ask participants to be open, honest and objective when

Template of Project Review



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providing their feedback. It can also be productive to ask participants to focus their criticisms on the project process, not on individuals.

Ask each participant in turn to read out one of the points they have made in their review form. Allow some time for discussion of each point, but aim to keep progressing through the points so that there is an opportunity to hear all of the points. Continue until all points have been heard.

Based on the points raised and the discussion, ask the participants to list their top five actions that can be taken to improve the performance of future projects and make a note of these.

3. Reporting the findings of the review

To ensure that the conclusions from the review are captured and acted upon it is important to summarize the findings from the review workshop into a short report. This should explain the scope of the report, describe the review workshop activity and highlight the recommended actions to improve the performance of future projects.

One aspect to think about is how the benefits of the project could be enhanced. For instance, if a new eco-innovative product has been launched, should the company now apply for an eco-label for the product? Is there an award scheme for sustainable product innovations that you could enter? Are there other parts of the company that could benefit from what has been achieved within the project? These types of follow-up actions should be noted in the report for discussion at the roadmap and business model review.

Once the review report is ready, you should try to arrange a short meeting with the CEO and the Senior Management Team in order to present a summary of this report. This presentation can be integrated at the start of the roadmap and strategy review, described in the activity *RE.3 Review the business model and roadmap*.

→ Further information in the Metals Supplement

Project review

Project _____

Date _____

Version _____

Project data and documentation

What data sources can provide evidence of the performance of the project? e.g. requirements specification vs solution specification, budget vs actual spend etc.

Scope

Which aspect of the project will be covered and who will be consulted during the review?

Key aspects to review

What are the one or two key aspects we should focus attention on during the review?

Review questionnaire

Did the project accomplish what it set out to achieve?

What went well within the project?

What was challenging about the project?

What could have been done differently?

What wider benefits has the project generated beyond its primary scope? e.g. any new knowledge and skills, new partnerships, improved gender equality or brand and public relations benefits?

What have you learned from participating in the project?

Workshop participants

Who should participate in the review workshop?

Used during activities

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LEARNING CASE STUDY OF PROJECT REVIEW

Project data and documentation

- Process mass balance completed in month 12 shows a 28% reduction in fish loss compared to the baseline data
- Project budget report shows that \$8,500 spent from \$10,000 budget
- Conclude that project achieved its main objectives

Review questionnaire

- Did the project achieve its objective to 'Reduce fish loss within the factory by 25% within 12 months'?
- Could a greater reduction of fish loss been achieved? If so, how?
- Has the project helped to promote a culture of eco-innovation in the company?
- What other benefits has the project delivered?
- Has the project had any negative impacts for Tasty Tuna?
- Did the sub-projects address the most important sources of fish loss within the factory?
- Was the process for generating ideas to reduce loss completed in a thorough and systematic manner?
- Were there other ideas that you think are still worth implementing?
- What was the most challenging aspect of the project?
- How could the implementation of future projects be improved?

Scope

- Scope to exclude the third sub-project as this was not fully implemented
- Review questionnaire will be sent to all Production Operatives, project team, and Quality Manager

Key aspects to review

- Results and positive impacts of the project – generating convincing data to present to Senior Management Team
- Idea generation process – was the idea generation process effective?
- Learning – How could we improve in future projects?

Workshop participants

- Production Operatives x2
- Production Team Leaders x2
- Production Manager
- Production Technicians x2
- Quality Manager

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TIPS & TRICKS

REVIEW THE ECO-INNOVATION KPIS

As part of the project review you should evaluate the KPI's used for the project. This includes evaluating whether the set KPI's are adequate according to what they should measure. Furthermore, it will be important to examine whether the input data is representative and meaningful, thus allowing appropriate tracking of the success. The UNIDO Cleaner Production Toolkit suggests a template for a short report on the KPI's (UNIDO CP Toolkit volume 7), which can be used and adapted for this purpose. relationship with key clients.



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BACKGROUND INFORMATION

Table 8 shows several indicators to measure sustainability in the Metals sector. The financial, business, environmental and social indicators constitute important KPIs for the Metals sector.

The KPI's defined for the Value Stream Mapping project should be revised at different points in time to ensure the direction of the project and to evaluate the progress. In the case of BikeBizz Co., the fulfilment of the requirements listed in Table 21 need to be reviewed along the process (see BR.3).

After the first project month, requirements 1 and 2 were evaluated. As a result, requirement 1 has been fulfilled: three training sessions have been conducted for selected staff involved in the value stream mapping. Regarding requirement 2, eleven KPI's have been set for being able to quantify the value streams. Among those were the Process Cycle Efficiency (PCE), the Overall Equipment Efficiency (OEE), the quantity of VOC emissions at the painting booth, the total amount of scrap produced during production. The business and production goals have been taken over from the business strategy.

After project month two, it was ascertained whether it had been possible to collect all the data required for having values for the KPI's. Different instruments had been acquired, like thermocouples for measuring the oven temperature, while some other measurements (paint sludge composition) had been assigned to external companies.

After obtaining all critical data from relevant departments, the PCE (value added time/total process time) was calculated to be 12%, which is well below the industry best practice lean manufacturing standard of 25%. Analysis of the turnover time for each process revealed that the process for cutting off the tube-ends for assembly required two workers when one could suffice with minor capital investment.

Additional identified processes with a low cycle efficiency was the surface cleaning and painting step where significant resources are spent on equipment cleaning (for colour changes) as well as management of hazardous waste. It was estimated that the PCE could be increased by 5% just by improving existing practices and with minor capital investment.

The KPI's were deemed fit-for-purpose after cross-referencing them alternative methods of calculation, e.g. using purchasing and sales records.

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Table 8: Examples of different indicators to measure sustainability in the Metals sector.

Group of indicators	Examples of indicators		
Financial indicators To track sales and costs	<ul style="list-style-type: none"> • EBITDA: Earnings before interest, taxes, depreciation, amortization • ROI: Return on investment • COGS: Costs of goods sold • R&D: Research & Development expenditure (%) 		
Business performance To gauge operational performance, market and marketing efforts	Operational <ul style="list-style-type: none"> • Overall Equipment Effectiveness • Lean metrics: batch cycle time, inventory days supply (IDS), process velocity... 	Market <ul style="list-style-type: none"> • Market growth rate • Market share • Brand equity 	Customers' relationships <ul style="list-style-type: none"> • Customer satisfaction Index or the Net Promoters Score • Customer retention rate • Marketing effectiveness
Environmental indicators To measure the interaction with or impacts on the environment	<ul style="list-style-type: none"> • Inputs • Restricted substances intensity • Recycled/reused content 	<ul style="list-style-type: none"> • Operations • Water/Energy intensity • Renewable production of energy • Residuals intensity • Air/water releases intensity 	<ul style="list-style-type: none"> • Products • Recycled/reused content • Restricted substances content • Recyclability • Energy consumption intensity • Water/Carbon/Chemical footprint
Social indicators To account for the impacts on the society including employees	<ul style="list-style-type: none"> • Number and rate of employee turnover by age group and gender • Number of accidents related to unforeseen risks, injuries, lost days, absentee rates and fatalities • Staff value & satisfaction • Average hours of training per year per employee • Assessment and management of impacts of operations on communities 		