

# COMPANY NAME

## Stage-End Report Detail

*To complete this document replace the variable (blue) information indicated by dollar signs with the correct information for your project, then change the font color to 'auto' and remove the dollar signs. Help text (red) is provided for assistance and must be deleted before publishing the report. **Do not delete any sections of this template.** If a section does not apply, mark the section, "Not Applicable."*

### **\$ PROJECT NAME \$**

**PRODUCT MANAGER: \$ Product Manager's Name \$**  
**PROJECT MANAGER: \$ Project Manager's Name \$**  
**DEVELOPMENT MANAGER: \$ Development Manager's Name \$**

### **\$ STAGE \$ STAGE END REPORT DETAIL**

Prepared By: \$ Author(s) Name(s) \$  
Date Created: \$ Creation mm/dd/yy \$  
Version Number: \$ Version Nbr / Draft \$  
Date Revised: \$ Revision mm/dd/yy \$

**Revision History (Template)**

*Use this Revision History for revisions to the Stage End Report Template. Complete the table below as indicated. Delete these instructions when the report is ready for publication.*

<b>Document Version</b>	<b>Revision Date</b>	<b>Originator</b>	<b>Revision Description</b>
1.0	xx-xx-20xx	Flo Samuels	Initial Release.
1.1	<i>Date</i>	<i>Your Name</i>	<i>Short Description of Changes</i>

**DOCUMENT DISTRIBUTION LIST**

**DEPARTMENT**

**NAME**

\$ Department \$

\$ Name \$ (who has master)

**\$ General Distribution Category \$**

**Executive Council**

**Key Stakeholders**

\$ Department or Title \$

\$ Name \$

\$ Department or Title \$

\$ Name \$

\$ Department or Title \$

\$ Name \$

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*When you've completed your report, to update the Table of Contents, place your cursor anywhere within the Table of Contents (it will become highlighted), hit the F9 key and select 'Update Entire Table'.*

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## **1. EXECUTIVE SUMMARY**

For all projects, stage end reports will be prepared for:

- Project Launch
- Feasibility (including Business Case)

Based on the software development life cycle selected for the project, subsequent stage end reports will include the following stages:

- Requirements
- Design
- Development
- Test
- Implementation

If the classic waterfall life cycle is selected, the stage end reports will be in the same order as the preceding list. If other life cycles, such as iterative, rapid delivery, prototype, or web design, are selected, the stage end reports will be based on module development. This will be noted as indicated below:

**\$ Development Life Cycle \$**  
**\$ Stage End Reports Schedule by Component \$**

*Use this section to briefly document the highlights of the report and its recommendations. Include all important points for signoff purposes - main scope and requirements changes, any major risks or unresolved issues, changes in bottom line costs and benefits, schedule changes, and any major items that are affecting the progress of the project.*

### **1.1. Project Summary**

*In paragraph form, provide a brief description of the project and the scope and requirements. Include major requirements and main scope inclusions/exclusions only. Keep it at a high-level but include enough detail for signoff purposes.*

*NOTE: this can be a copy of the same section from the previous Stage End Report, if appropriate.*

**\$ Scope and Requirements \$**

### **1.2. Stage Summary**

*In paragraph form, provide a summary paragraph listing the major deliverables of the stage, a one-sentence description of the purpose of those deliverables and whether they were produced on time and within budget. If not, include a brief explanation of why not. Include any key events that may have relevance for project progress. Reference appropriate detailed sections of the document.*

**\$ Description of stage and major deliverables produced \$**

### **1.3. Schedule Summary**

*Summarize how the schedule for the stage just completed was met. Summarize the schedule for the next stage and give high level timelines for the remainder of the project. If there are any major assumptions that may directly affect the next stage or project schedules, include them here.*

**\$ Major Milestone activity for stage completed \$**  
**\$ Major Milestone activity for next stage \$**  
**\$ High level project timelines \$**  
**\$ Major assumptions \$**

**1.4. Cost / Benefit Summary**

*Summarize the costs for the project so far and the projected costs for the next stage and the remainder of the project. Summarize the projected benefits.*

\$ Cost / Benefit \$

**1.5. Constraints, Issues and Risks**

*Briefly describe any outstanding issues or major constraints and limitations affecting the project. This may include scope, technical, schedule, resource, cost, or other issues that could not be resolved. Risks that are not strongly balanced with effective counter measures may also be described here.*

\$ Constraints, Issues and Risks \$

**1.6. Summary of Changes**

*Briefly summarize and explain any changes made to the scope, requirements, costs, benefits, risks or schedule since the last stage report was produced. For requirements changes, indicate how the changes have affected schedule and costs.*

\$ Description of major changes affecting the project during the Stage \$

**1.7. Recommendation**

*Use this section to give a synopsis of the recommended project approach and next steps. Key components of the Project Plan and significant milestones may also be listed, if relevant. The section summarizes the project team's assessment of the detailed information in the plan and gives the Executive Council a high level view of what to expect for the rest of the project.*

\$ Recommendation \$

## **2. BACKGROUND INFORMATION**

### **2.1. Document Purpose and Structure**

This document summarizes the results of the \$Stage\$ stage of the \$Project Name\$ project and recommends proceeding to the \$Stage\$ Stage. The project plan has been reviewed and revised, and consists of:

- high-level Requirements
- a clearly defined Project Scope
- project issues
- outline solution
- a detailed schedule for the next stage of the project
- a revised overall project plan
- a project organization structure
- an updated Quality Plan
- an updated SCM Plan
- project control procedures to be used for the project
- a revised risk management plan
- updated training requirements
- a revised cost / benefit analysis
- sponsor benefits

This report includes:

- A distribution list of people receiving this document.
- *Section 1 - Executive Summary*, providing an overview of key project information and high level recommendations for the project. This is the minimum that must be read and approved for Executive Council signoff purposes.
- *Section 2 – Background Information*, providing a summary of the history of the project, plus an explanation of the Stage End Report and key terms used in it.
- *Section 3 – Stage Summary and Deliverables*, providing a summary of the stage activities and key events, plus references to the major work products produced during the stage.
- *Section 4 – Revised Project Plan*, providing details of the future plan for the project and referencing project documentation not included in this report or attached as appendices.

These plans act as a recommendation to the Executive Council for how the \$Project Name\$ should be completed. After studying the document, if the Executive Council recommends changes; this Stage End Report will be updated to reflect these changes prior to distribution, to ensure accurate communication of the project plan to all involved parties

The rest of the document supplies or references supporting information that has been developed during the stage. These sections, appendices and referenced documents provide the detailed information and analysis upon which the Executive Summary was based and should be studied for a full understanding of the project plans.

### **2.2. Key Terms and References**

*List any project specific acronyms or abbreviations used in the document and explain their meaning in full. For example :*

*SR = Service Request*

*VCS = Version Control System*

**\$ Key Terms and References \$**

**2.3. Project Background**

*Describe any (past or current) related projects that have contributed to this project or any (current or future) projects that should be worked in conjunction with this one. Note the status of these projects, their successes, challenges, and any key contacts for further information.*

*Describe why and how this project was initiated and any related project history.*

\$ Background \$

**2.4. Related Documents**

*List documents associated with any related projects or the history of this project as described in Section 2.3 Project Background. Include any previous Stage End Reports. Do not include design or technical documents that have been produced during the stage being reported – these will be listed in the following section.*

<b>DOCUMENT TITLE</b>	<b>VERSION</b>	<b>DATE</b>	<b>DOCUMENT STORAGE REFERENCE</b>
\$ Document Title \$	\$ Vsn \$	\$ mm/dd/yyyy \$	\$ Path/filename or hardcopy holder's name \$
\$ Document Title \$	\$ Vsn \$	\$ mm/dd/yyyy \$	\$ Path/filename or hardcopy holder's name \$



**3. STAGE SUMMARY AND DELIVERABLES**

**3.1. Updates to Project Requirements**

*List and describe only updates that were made during the stage being reported. These can be obtained from Requirements Management software system version reports. If there were no updates, please state this explicitly.*

[\\$ Project Requirement Updates \\$](#)

**3.2. Changes to Project Scope**

*List and describe only changes that were made during the stage being reported. If there were no changes, please state this explicitly.*

[\\$ Project Scope Changes \\$](#)

**3.3. Updates to Project Organization**

*In paragraph form, describe updates that were made to the Project Organization during the stage being reported and/or any known updates to the Project Organization for the next stage. If there were/are no updates, please state this explicitly.*

[\\$ Project Organization Updates \\$](#)

**3.4. Issues and Constraints**

*Describe any outstanding issues or major constraints affecting the project. This may include scope, technical, resource, cost, or other issues that cannot be resolved. Also identify any important, specific limitations within which the project must operate.*

*Issues can be taken from the Requirements Management software system Issues Log or Customer Complaint software system Issues. When the Development Stages begin, issues may also be in the Defect Management software system.*

*NOTE: Do not include scheduling issues - these are documented separately in Section 4. If there are no issues or constraints, please state this explicitly.*

[\\$ Issues / Constraints / Limitations \\$](#)

**3.5. Stage Activities and Key Events**

*In paragraph form, provide a description of the activities of the stage and how they helped to meet the project objectives. Include a summary paragraph for each of the major work products of the stage and whether they were produced on time and within budget. If not, include a brief explanation of why not. Describe any key events that may have affected project progress.*

[\\$ Summary of activities and events \\$](#)

**3.6. Stage Products**

*List all work products that were created and/or revised during the stage in this section. Include the Quality Plan, the SCM Plan and other Project Control documents if they are not attached as appendices. If a separate evaluation / design document or technical report is being produced as part of this stage, list it here.*

The following deliverables were produced during the \$Stage\$ stage. They are available on-line in the locations shown in the following table.

<b>Deliverable Name</b>	<b>Vsn Nbr</b>	<b>Deliverable Description</b>	<b>Where Located</b>
\$ Deliverable \$	\$Vsn\$	\$ One sentence description of why the deliverable was created \$	\$ Path and filename for deliverable\$

**4. REVISED PROJECT PLAN**

*At the end of each stage, you must review and revise the Project Plan (developed when the initial request was received by Product Management and revised at each previous stage end). In this section describe any significant changes in the schedule, costs, benefits and risks since the previous stage end report was published.*

**4.1. Project Schedule**

4.1.1. \$ Stage \$ Stage Milestones

*List the milestones that were published in the previous Stage End report, together with the actual dates.*

Stage Milestones		
Milestone	Scheduled Date	Actual Date
\$ Major Milestone from Stage End Rpt \$	\$mm/dd/yyyy \$	\$mm/dd/yyyy \$
\$ Major Milestone from Stage End Rpt \$	\$mm/dd/yyyy \$	\$mm/dd/yyyy \$
\$ Major Milestone from Stage End Rpt \$	\$ mm/dd/yyyy \$	\$ mm/dd/yyyy \$
\$ Major Milestone from Stage End Rpt \$	\$ mm/dd/yyyy \$	\$ mm/dd/yyyy \$

4.1.2. \$ Stage \$ Stage Milestones

*List the major milestone descriptions and scheduled dates for the next stage. The detailed stage plan may be attached as an appendix, if required.*

Stage Milestones	
Milestone	Scheduled Date
\$ Major Milestone for Next Stage \$	\$ mm/dd/yyyy \$
\$ Major Milestone for Next Stage \$	\$ mm/dd/yyyy \$
\$ Major Milestone for Next Stage \$	\$ mm/dd/yyyy \$
\$ Stage End Review \$	\$ mm/dd/yyyy \$

4.1.3. Schedule Milestones

*In paragraph form, list any significant changes to the high level target dates since the previous stage end report.*

\$ Changes in high level schedule \$

*In the following table, list major milestone descriptions and dates from the overall Project Schedule. Attach the full project schedule in an appendix (**mandatory**).*

Overview of Remaining Project Schedule	
Milestone	Timeline
\$ Major Milestone from Schedule \$	\$ mm/yyyy \$
\$ Major Milestone from Schedule \$	\$ mm/yyyy \$
\$ Major Milestone from Schedule \$	\$ mm/yyyy \$
\$ Major Milestone from Schedule \$	\$ mm/yyyy \$
\$ Major Milestone from Schedule \$	\$ mm/yyyy \$
\$ Major Milestone from Schedule \$	\$ mm/yyyy \$
\$ Project Closure \$	\$ mm/yyyy \$

4.1.4. Schedule Dependencies

*Describe any significant schedule dependencies (especially external factors).*

\$ Schedule Dependencies \$

4.1.5. Schedule Assumptions/Issues

*List all schedule assumptions and issues for the next stage and for the overall project schedule.*

\$ Schedule Assumptions/Issues \$

**4.2. Business Case**

4.2.1. Cost / Benefit Analysis

*In paragraph form, summarize any revisions to the cost/benefit analysis. Attach the full Cost/Benefit Analysis spreadsheet(s) in an appendix (**mandatory**).*

\$ Cost / benefit analysis changes \$

4.2.2. Risk Management

*In paragraph form, summarize any revisions to the Risk Management Plan. The full Plan may be included as an appendix attachment to this report if required.*

\$ Risk analysis and risk management actions changes \$

**5. ATTACHMENTS**

**5.1. APPENDIX A - Overall Project Schedule**

*Attach or copy the overall MS Project project schedule Gantt Chart at the step level (**mandatory**).*

**5.2. APPENDIX B - Cost / Benefit Analysis**

*Attach or copy the Cost/Benefit Analysis(mandatory).*

**5.3. APPENDIX \$ x \$ - \$ Other Project Work Products \$**

*Optionally attach or copy any other project deliverables that are necessary. Possible inclusions are:*

- *the Next Stage Detailed Schedule (Gantt chart)*
- *the Quality Plan*
- *the SCM Plan*
- *the Risk Management Plan*
- *the Training Requirements and Plans*
- *the Project Organization Chart*
- *the Business Case*

*Even if these documents are attached, make sure they are referenced in the stage deliverable list in Section 3.*