

Consulting Engagement Post-Mortem Document Outline

1. Engagement Overview

- Project name and brief description
- Client name
- Consulting team members
- Engagement dates (start–end)
- Project objectives and scope

2. Approach & Methodology

- Summary of approach/methods
- Key deliverables
- Tools and frameworks used

3. Results & Outcomes

- Main outcomes and deliverables produced
- Client feedback
- Success metrics and measurements

4. What Worked Well

- Project strengths
- Successful practices
- Major accomplishments

5. Challenges & Areas for Improvement

- Key issues encountered
- Barriers to success
- Lessons learned

6. Recommendations & Next Steps

- Suggestions for future engagements
- Opportunities for process improvement
- Potential follow-up actions

7. Appendix

- Project documentation and links
- Meeting notes
- References