



Template Guide

What is a Phase Review Form?

A Phase Review Form is a document used to formally request approval to proceed to the next phase of a project. It provides a 'checkpoint' at the end of each project phase to ensure that the project has achieved its stated objectives and deliverables as initially planned. Phase Review Forms should be completed at the end of the following project phases:

- Project Initiation
- Project Planning
- Project Execution

It is not necessary to complete a Phase Review Form at the end of the Project Closure phase as approval to close the project is covered within the 'Project Closure' document. The Phase Review Form should describe the status of the:

- Overall project
- Project Schedule (based on the Project Plan)
- Project Expenses (based on the Financial Plan)
- Project Staffing (based on the Resource Plan)
- Project Deliverables (based on the Quality Plan)
- Project Risks (based on the Risk Register)
- Project Issues (based on the Issues Register).

When to use a Phase Review

Phase Review Forms should be completed at the end of each phase of the project (excluding Project Closure). The Review Form should be completed by the Project Manager and approved by the Project Sponsor. To obtain approval, the Project Manager will usually present the current status of the project to the Project Board for consideration. The Project Board (chaired by the Project Sponsor) may decide to cancel the project, undertake further work within the existing project phase or grant approval to begin the next phase of the project.

How to use this template

This document provides a guide on the topics usually included in a Phase Review document. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.