

Top Mistakes in Conducting Lessons Learned

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Assertion

Most lessons learned and their follow-up actions are ***not*** conducted in the most effective manner where the business gains an optimal return on its investment



What you will take away from this session

- Identify the top 10 mistakes in conducting lessons learned
- Identify many additional common mistakes
- Handy 1-sheet takeaway that lists the lessons learned mistakes



What is a lessons learned review?

- A review that is performed when one of the following has completed:
 - The project
 - A significant portion of the project
 - An increment of the project (could be a sprint: *retrospective*)
- Conducted by all members of a small project or selected group of members representing all the major organizations that participated in the project
- Group identifies what went right and what went wrong to apply towards future projects or remaining portions of the current project



Let's examine top 10 mistakes in conducting a lessons learned



1. Ensure a well-defined lessons learned process is in place

Examples of questions to address:

- What is the overall process to be followed?
- When and how frequently will lessons be captured?
- Who should be invited to a lessons learned review?
- How will the lessons learned review be conducted?
- During the review, what are the categories of inquiry to ensure all key aspects of the project have been sufficiently reviewed?
- How will the required follow-on work from the lessons learned be identified and managed?
- How will the results of the lessons learned be made available to others?
- What is the process to improve the lessons learned process?



2. At the start of a project, review the lessons learned from the most recent, relevant projects

- If lessons learned have been done for earlier projects, it would be business foolish not to review those lessons
- Recommend that this exercise is mandated
 - 3-member new-project review board
 - Made up of 3 experienced project managers
 - PM's of new projects review lessons from past projects and identify the lessons to apply to their new project
 - PM must have board's approval to move on to next phase of project
- Board members rotate



3. Capture lessons learned throughout the project

- Don't wait until project has completed
- Lessons can be overlooked
- Reduces focus for continuous improvement
- Consider requesting lessons learned once per week in a team meeting dedicated for another purpose such as a project tracking meeting
- Consider an intranet data base where any stakeholder can log in lessons learned or ideas



4. Solicit feedback on the performance of the project manager

- Performance of PM must be part of lessons learned
- Projects with continuous serious issues often can trace the root of the problems to an ineffective PM



5. During a lessons learned, focus on identifying the top 3 things done well and the top 3 things requiring improvement

- Most lessons learned reviews cause members to become overwhelmed with lessons to run off and work
- After identifying the lessons, focus only on the top 3 items that went well and the top 3 that need improvement
- This is a total of 6; not 16 or 60
- Focusing on the top 6 gives the best business return
- Avoid boiling the ocean



6. Solve the problems identified in the lessons learned outside the review meeting

- Ensure the lessons learned review takes as little time as possible
- Solving problems during the review meeting can cause members to be rushed and impatient which can yield less-than-optimal solutions



7. Assign and track to closure action items that represent addressing the top 6 items coming out of the lessons learned

- One person is assigned to drive the process
- An action item is created for each of the six items
- Ensure the action items are assigned to the right people
- Routinely track action items to closure
- Ensure solutions have been appropriately institutionalized



8. Present lessons learned findings to the project sponsor, management, the team and outside teams

- Present this valuable information to others
- The project sponsor should care because he or she is likely the person paying for the project and should want each successive project to learn from past projects
- The management of those on the project should care to see how well their employees performed
- The project team wants to see the summary of the findings; after all, the findings are a reflection on their performance
- Lastly, other management and teams should want to see the lessons learned findings so that they can better mitigate these issues on their projects



9. Build a lessons learned data base

- Project managers and members of new projects can benefit
- Data base should be easy to navigate for future reference
- Data base should show top problems common to multiple projects as well as top actions that benefited projects
- Without a lessons learned data base, there is little value in conducting lessons learned reviews



10. Conduct post-implementation reviews

- Post-implementation review:
 - An independent review
 - Performed at selected points *after* the product or service has been delivered to the client
 - Allows a completed product or service to be examined for meeting key business parameters
 - Provides valuable feedback to the development and support groups so they can continue to improve their processes and the results of key measurements
- Helps to validate lessons learned and can result in new lessons



Additional common mistakes...

- At the start of a project, review the lessons learned from the most recent, relevant projects with the team
- Gather feedback from stakeholders who are outside the core players
- Solicit project problems accountably; not anonymously
- Managers should not attend lessons learned review meetings



Additional common mistakes... (cont.)

- Promote the use of an outside facilitator to run the lessons learned review
- The project manager should attend the project's lessons learned review meeting
- Carefully select non-company project members to be invited to the lessons learned
- Make the lessons learned as much fun as possible



Additional common mistakes... (cont.)

- Provide guidelines for participants to follow in the lessons learned review meeting
- In a lessons learned review meeting, focus not only on what went wrong but what went right as well
- Create a lessons learned report
- Update the lessons learned process after each lessons learned that offers improvement ideas
- Managers should review all the lessons learned from a review



Power Snippets

Top 10 Mistakes in Conducting Lessons Learned



How to conduct a lessons learned review?

- Make sure that everyone attends or is represented.
- Attempt to make the event enjoyable for all; cater in lunch if possible.
- Introduce the objective of the lessons learned review, list ground rules and explain the process.
- Set up two flipcharts (or electronic screens), one for “praise,” the other for “improvement.” Assign a scribe. Place filled charts on meeting room walls. The scribe should only add items to these charts after the facilitator has told him/her to do so.
- Create a high-level chart that represents the processes, phases, deliverables and other relevant parameters of the project. Use this chart to take everyone down memory lane.
- Create a “tickler” chart of keywords and phrases that can trigger the identification of useful information. Examples: Staffing and skills; client involvement; education and training; schedules and milestones; change control and scope creep; approvals; productivity; quality; tools; relationships; budget assessment; noteworthy accomplishments; problems.
- After completing the brainstorming, select the top three items from the praise list. Do the same with the improvement list.
- After the meeting, prepare a relatively brief report that can be archived for access by others. Present the results to management.
- Assign people to work the top problems and the top good actions and track these assignments to satisfactory closure.



Sprint retrospective

- Also known as Lessons Learned
- Last Scrum Team meeting of the Sprint
- Team discusses:
 - What went well
 - What could have been better
 - What they can do to apply lessons to the next Sprint
- An important event to ensure that continuous improvement across the Scrum Team is occurring
- Typically, only one hour but could be up to three hours is time-boxed for the Sprint Retrospective



Last words of advice on lessons learned reviews

- Do them!
- Don't make the excuse that they are not mandatory in your organization; you don't need someone to force you to do lessons learned reviews
- An organization is not likely to show significant or routine improvement if it does not pause occasionally to reflect on its performance
- We must study our weaknesses and blemishes if we want to become the best

