

Lessons Learned

Identifying the Learning

The project manager cannot conduct lessons learned on his/her project – the reviewer needs to be an independent peer of the PM (possibly part of the PMO function). The PM's role is to provide input to the review, or reviews. Lessons learned should not just be at the end – useful information can be gathered at many points during the project.

However, projects cannot be completed until all of the required deliverables are finalised¹. If 'lessons learned' are a requirement, the project manager is responsible for ensuring the process is conducted effectively.

PIRs

A 'Post Implementation Review' (PIR) will generate lessons learned but is a different process that occurs after the project has finished. The focus of the PIR should be on measuring the realisation of the benefits the project was created to enable. The key question being: *“Was the overall process successful?”*

PIRs should encompass the complete flow from recognising a need, defining the project, doing the project and then how effectively the business used the project's deliverables to create the intended value².

Project lessons learned are focused on *'doing projects right'*. The PIR should focus on the organisation *'doing the right projects'*.

Managing the Knowledge

The challenge with lessons learned is making the information gathered easily and quickly available to the people who need it³. The organisation needs to develop a clear understanding of the *customer (or customers)* for the lessons. This will influence the objectives of the lessons learned program, the development of any templates or tools, and the necessary process and impact measures. The needs of the current team are likely to be different from the needs of future teams and managers.

Making the system user-friendly and effective for both recording lessons and retrieving lessons is critical. If the lesson is not properly indexed or the index does not reflect the context the organisation is working within, retrieving information is difficult. Some valuable ideas on developing an effective Lessons Learned KM system have been published by the American Productivity & Quality Center (APQC). Their key recommendations are:

1. **Determine the Strategic Objectives.** When an organization designs a lessons learned process, there are two primary strategic paths that the organization can pursue. An organization must define how lessons will be used to determine the best approach. Ideally, an organization enable both options, recognising that each requires different processes, people, and investments:
 - a. Focusing on supporting current process or project teams with 'lessons learned' built into the project or process methodology. This requires staged gathering of lessons during the course of the project with feedback loops to make the information immediately available to the team.

¹ For more on deliverables see WP1042:

www.mosaicprojects.com.au/WhitePapers/WP1042_Outputs_Outcomes_Benefits.pdf

² For more on the 'value chain' and benefits realisation see:

http://www.mosaicprojects.com.au/WhitePapers/WP1023_Benefits_and_Value.pdf

³ A very public set of lessons learned have been published by the London Olympics. To access the full set of published documents see: <http://learninglegacy.london2012.com/>

- b. Focusing on creating a mechanism by which lessons are made available to future projects or users. To be effective the lessons in this role the lessons need to be indexed, categorised and stored in a usable retrieval system.
2. **Align the Lessons Learned Approach with Process Excellence.** The value of a ‘Lessons Learned’ system is enhanced significantly if the enterprise has a widely deployed and mature process or project excellence methodology⁴.
 3. **Create Governance Processes and Clearly Defined Roles.** Governance is a critical success factor for an effective lessons learned program, it provides a well-defined structure for oversight and execution of a common approach, enabling an organization to optimally coordinate resources and manage lessons learned activities. All stakeholders should know who has accountability for the process and what roles are responsible for supporting and/or executing the various process components. Ideally, this will be the responsibility of a single entity, possibly a PMO⁵.
 4. **Integrate the Lessons Learned into Core Processes.** Any effective lessons learned process relies on well-defined, well-managed, and properly resourced lessons capture events. By integrating the lessons learned approach into project planning, initiation, execution, monitoring, and closeout procedures, the organisation ensures that key experiences are captured. When the capture and reuse of lessons are viewed as critical components of the work, employees are much more inclined to turn to lessons learned for guidance.
 5. **Leverage Facilitators at Key Points.** Most successful lessons learned processes focus on human interaction. Trained moderators⁶ who are experts at extracting and distilling lessons help draw out what went well, what went wrong, and how problems might have been averted; this helps the current team learn by reflection and ensures the lessons are captured properly for future use.
 6. **Make Captured Lessons Easily Accessible.** Lessons should be readily available to employees interested in discovering how previous experiences may inform their efforts. This requires a well-designed content management strategy enabled by a technology portal, and potentially multiple modes of access.
 7. **Review and Publish Lessons in a Timely Manner.** Processes for publishing lessons quickly without compromising review and validation procedures.
 8. **Encourage Participation.** Organizations should provide process training, set clear expectations, help employees recognise the opportunities to be gained from making effective use of lessons learned.
 9. **Measure Progress and Impact.** Factors to consider when designing a measurement program for lessons learned include source vs. recipient measures, process vs. impact measures, and individual vs. organizational reuse. Performance and impact measures are crucial; the right combination of measures helps track progress and demonstrates the value of the lessons learned process to: project team members, business leaders and executives. Knowing the extent to which lessons learned are being integrated into daily work can encourage participation and spur process improvement.

Use STEALTH

Gathering ‘lessons learned should be formalised. STEALTH is a Lessons Learned process adapted from the U.S. Air Force:

- S:** Set time/location/preparation phase. Fighter pilots hold a formal debriefing 45 minutes after they are back on the ground.
- T:** Tone. Keep the tone nameless and rankless to facilitate open communication. Lead by example.

⁴ For more on OPM3 and process maturity see: <http://www.mosaicprojects.com.au/OPM3.html>

⁵ For more on PMOs see: http://www.mosaicprojects.com.au/WhitePapers/WP1034_PMOs.pdf

⁶ For more on facilitation see: http://www.mosaicprojects.com.au/WhitePapers/WP1067_Facilitation.pdf

- E:** Execution versus objectives. Ask “Was the objective clear, measurable and achievable? Did it support our picture of the future?” After reconstructing the sequence of events, ask, “Did we accomplish the mission objective?”
- A:** Analyse execution. First, review data to find execution errors and successes. Next, determine the cause of each error and success. And, finally, identify the root cause for each error and success.
- L:** Lessons learned. Look for patterns. Determine the prominent or recurring root cause that bridges several errors or successes.
- T:** Transfer lessons learned. Spreading the lessons learned by errors and successes helps to accelerate experience and improve future execution.
- H:** High note. End with a positive summation of all that was learned. A formalized process for debriefing people after an experience can help any leader create the best practices that build a better organization.