Facilitation Team Summary Recommendations

General Rules

- Lessons Learned sessions tend to bring out the negatives, be sure to ask "What Went Right"
- Conduct Lessons Learned meetings
- Depending on the size and type of project there can be one or more LL session.
- Use survey questions (recommended below) to solicit feedback
- Meetings and questions should address both PM and non-PM Lessons Learned

Before the meeting

- Use online anonymous survey to collect feedback, distill down to areas of discussion and focus actual meeting(s) around identifying specific actions to follow
- Prepare the team in advance of the meeting for what will be discussed
- Take steps to ensure that the meeting will be comfortable and non-confrontational
- Involve a "scribe" or two to ensure that all notes get captured - the PM could be considered for this role
- Project Manager of the project should not be facilitator of the lessons learned - get another PM or strong facilitator
- Who is invited? Should include team members, customers, other stakeholders
- Try to plan to feed people (when possible), breaks may be needed as well
- Encourage creative thinking - make it a relaxed environment for having the discussion - go to a less familiar, interesting place

During the meeting

Introduction

- Be clear about the agenda, what the goals are for the meeting
- Develop a list of ground rules - have the team develop these (suggested set - be nice, don't blame, be constructive)
- Hand out set of topics and ask team which items they would like to talk about - go around the table to discuss - make sure each person gets a turn
- Start session with an overview of the project - goals, what we accomplished, any particular challenges encountered

During discussion

- Focusing the discussion around actions/solutions rather than rehashing the past
- Identify top items to be worked on

Closing

- Identify clear actions and owners where appropriate
- If you use a meeting to collect the feedback, save a period of time at the end to focus on identifying solutions for the most important issues

After the meeting

- Followup on actions agreed upon

Other considerations

- Start out focusing on the positive lessons learned - what went well
- Be prepared to discuss specific problems (problem, perceived cause, what should have been done differently)
- For large projects, don't do it only at the end of the project - do LL at various key milestones
- Develop standard LL templates for online surveys
You can conduct surveys using questions selected from the following

Sample Questions for Lessons Learned Sessions

**Mid-Project Lessons Learned**

- What is going well that we want to continue?
- What isn’t going well that we want to fix?
- What can we do to improve?

**Key End of Project Questions**

- **General**
  - List top significant project successes? (keep to a manageable number)
  - What obstacles or unanticipated circumstances made it difficult to complete the project?
  - Based on what you know now, what should have been done differently in this project?
- **Communications**
  - Were communications adequate in all activities? (right time, right audience, right information, right type) If not, in what ways could communications be improved?
  - Was documentation appropriate, timely, and clear? If not, what should be included for future efforts?
- **Project Management**
  - What value did project management bring to the project?
- **Project Planning**
  - How well was the project staffed to complete the project?
  - How well was the project planned?
  - How well were roles and responsibilities defined?
  - How well was stakeholder input factored into the project planning process?
- **Project Execution**
  - How well did we execute according to plan?
  - How well were the stakeholders involved in the execution of the project?
  - How well were issues resolved?
  - How well did the teams/sub-teams work together?
- **Testing**
  - Was adequate testing performed (if applicable)? If not, what should be done differently next time?
- **Cutover**
  - Was cutover planned well? Executed well? If not, what should be done differently next time?

**Additional questions you may want to consider**

- **Project Planning**
  - Was the project plan realistic or unrealistic?
  - Did the planning effort include key stakeholders?
  - Were all major activities accounted for?
  - Did the individual team members responsible for the work provide the estimates?
  - Were appropriate staff involved in the planning effort?
  - Do you believe the technology PM applied provided a better ultimate outcome for this project?
- **Communications**
  - Were communications effective?
  - Were meetings effective?
  - Were expectations clear?
  - Did you know where to go to get information about the project?
  - Did communications go to the right people, at the right time?
  - Were communications with our consultant effective?
  - Did we escalate effectively and at the right time?
  - Were issues dealt with effectively?
- **Staffing, Roles, and Responsibilities**
  - Were people appropriately assigned to the project?
  - Was staffing sufficient?
  - Were roles and responsibilities clear?
  - Did team members and stakeholder fulfill their roles appropriately?
  - Was leadership and governance effective?
  - Have you participated in this type of technology project before?
• Project Execution
  • Was the project executed according to plan?
  • Was there an appropriate level of commitment and urgency?
  • Was change management performed appropriately?
  • Was risk management performed appropriately?
  • Was issue management performed appropriately?
  • Would you recommend this technology PM service to a peer?
  • Was the project flexible enough to adapt to unforeseen circumstances?
  • Did the project unduly stray from identified goals and objectives?
  • How well were scope changes managed
• Teamwork
  • Did the teams/sub-teams work effectively together?
  • Did the teams share a common goal/mission?
  • All stakeholders were appropriately engaged, involved, and available?
• Cutover
  • Was the cutover successful?
  • Was the cutover well planned?
  • Were cutover communications effective?
• Anything else?
  • What tools or techniques worked well?
  • How well did the project meet objectives?