

Lessons Learned:

We Won't Be Fooled Again

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What is Success?

- Did we manage projects *correctly*?
- Did we manage each project *successfully*?
- Can we improve in our project management practices to manage projects more efficiently?

Honest, Retrospective Insight



- How was the project delivered?

- Did the project deliver what it promised?

A Continuous Watch



Why Do It?

- Capture key project metrics
- Reduces rework and pitfalls for future projects
- Provides the opportunity to repeat what works well

Why Do It?

- Provides formal handoff to operations
- Obtain customer acceptance
- Communicate the end of the project
- Close off funding
- Release resources back to the organization
- Celebrate



Project Closing Statement

Project Closing Statement

Project Name:		Project ID:	
Exec Leader:		Project Leader:	
Start Date:		End Date:	
		Date Submitted:	

- Project closing is the process by which the project is brought to an end. The information from this template will be used to assist in improving the overall environment for project management in the organization.
- The Project Manager should guide the team members and other stakeholders through a standard project closing process so that all projects are completed in an organized and successful manner. Project closing ensures that the loose ends are addressed and provides a mechanism for documenting and sharing lessons learned.
- This template provides the following sections:
 - Project Closing Checklist – a reminder of the steps needed to close a project
 - Project Completion – document the project completion relative to the expected deliverables
 - Business Success – document the business success of the project relative to the business outcomes
 - Lessons Learned – document lessons learned for use by other projects

Project Closing Checklist

- The following checklist is meant to provide steps for the Project Manager to consider when closing a project. Click on the checkbox to indicate completion.
 - Complete handoff to operational units
 - Retain resources to support that transition
 - Provide new process flows and other required documentation to operational unit
 - Provide metrics for all new processes
 - Provide new/updated reporting schedule
 - Obtain sign-off for handoff to operational units
 - Obtain project sign-off from Executive Leader
 - Communicate completion to all stakeholders
 - Conduct a post-project review meeting
 - Review accomplishments versus expected deliverables
 - Complete project metrics (if possible at this time) to measure expected business outcomes
 - Document lessons learned

Project Closing Statement

- Project Closing Checklist
- Project Completion
- Business Success
- Lessons Learned

Project Closing Checklist

- Handoff complete
- Signature obtained
- Communication completed
- Post-project review conducted
- Project documentation finalized
- Project files stored
- Celebrate!
- Prepare performance feedback
- Resources released

Project Completion

ID	Deliverable <i>(from POS)</i>	Completion Metric <i>(from POS)</i>	Planned Date <i>(from POS)</i>	Actual Date	Successful (Y/N)
1					
2					
3					
4					
5					

Business Success



Did the project produce the anticipated business outcomes at the time expected?

Business Success

ID	Business Outcome <i>(from POS)</i>	Business Success Metric <i>(from POS)</i>	Expected Date <i>(from POS)</i>	Actual Date	Successful (Y/N)
1					
2					
3					
4					
5					

Lessons Learned

- What worked?
- What did not work?
- Suggestions for Improvement

Honest Reckoning



- Unbiased facilitation
- No judgements
- Collection of important data

Lessons Learned: What Worked

ID	What Worked? (Process, Tool,...)	Why Did It Work?	Suggestions for Improvement
1			
2			
3			
4			
5			

Lessons Learned: What Did Not Work

ID	What Didn't Work? (Process, Tool,...)	Why Didn't It Work?	Suggestions for Improvement
1			
2			
3			
4			
5			

Lessons Learned-Ground Rules

- Express the importance of honest feedback
- Explain the feedback is not personal – remind participants to focus on the process to improve the process
- Limit criticism to constructive criticism
- All recommendations should be actionable
- This is not a decision-making session; it is to solicit feedback only

Lessons Learned – Easy Collection

- Provide “categories for thought”
- Brainstorm
- Ensure all participants are engaged
- Follow the Rule of Threes
- Prioritize suggestions at the end of the session
- Allow for anonymous feedback

Don't Keep it to Yourself



Shout it Out!



Share the Wealth



Lessons Learned: Topics

- Project Coordinator
- Meetings
- Documentation
- Resources
- Project Management
- Communication
- Testing
- Risk Management
- Project End Dates



Lessons Learned: Project Coordinator

❑ Problem: Never enough



❑ Solutions:

- ❑ Assign to multiple projects
- ❑ Develop administrative staff
- ❑ Share roles



Lessons Learned: Meetings

❑ Problem: Too many meetings!



❑ Solutions

- ❑ Core Team vs. other sub-teams
- ❑ Face-to-face vs. virtual
- ❑ Agendas work
- ❑ Cancel

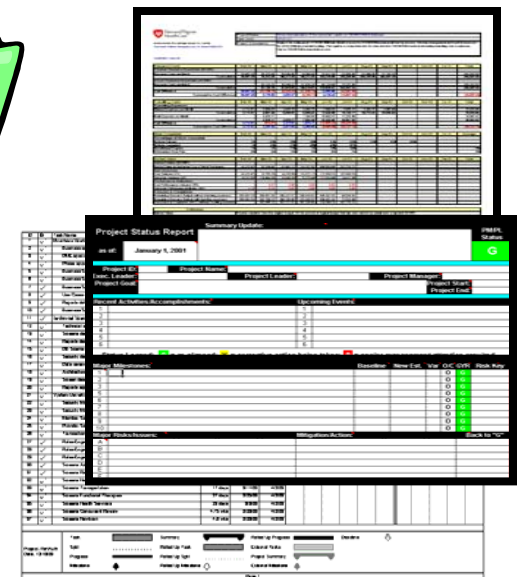


Lessons Learned: Documentation

❑ Problem: Too much, too few

❑ Solutions:

- ❑ Use Standardized Templates
- ❑ Use Central repositories
- ❑ Use naming conventions
- ❑ Use change control / version control
- ❑ Establish ownership



Lessons Learned: Project Management

❑ Problem: Disjointed, inefficient processes and tools

❑ Solutions

- ❑ Use standardized schedule layout
- ❑ Use joint planning to synchronize initiatives
- ❑ Define and follow an issues resolution process
- ❑ Define and follow a decision process
- ❑ Define and follow other PM processes, i.e., scope mgt, risk mgt, document control



Lessons Learned: Communication

- ❑ Problem: Large projects/program require dedicated efforts



- ❑ Solutions:

- ❑ Develop communication planning course
- ❑ Insert triggers and reminders for project team



Lessons Learned: Testing

❑ Problem: Need more detail in specs;
not enough time create/plan test scripts; no time
for iterations

❑ Solutions:

- ❑ Need to create testing methodology
- ❑ Create and use test issues grid
- ❑ Need more detail in testing specifications



Lessons Learned: Risk Management



- Problem: Too much reactive risk management

- Solutions:
 - Conduct a proactive workshop regarding project risk (a “pre-mortem”)

The Boundaries of Success

- True evaluation of success must extend beyond individual projects
- Evaluate the portfolio as a whole
- The portfolio is a multiplex
- Determining the success of a business plan and its associated initiatives represents many challenges

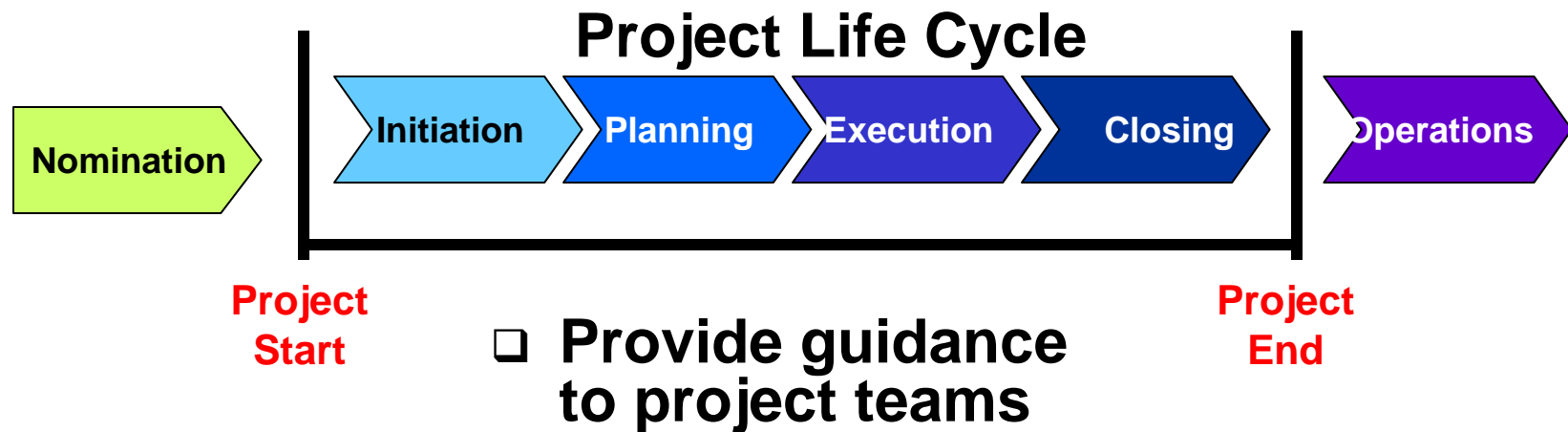
Retrospective Review

- Did we hit our target outcomes?
- What could we have done differently to produce more favorable results?
- How do these results influence our process and/or decisions for next year?

A Good Goal

- ❑ Improve the portfolio selection process

- ❑ Track and measure success



A Better Goal

❑ Improve the portfolio selection process

❑ Track and measure success

Project Life Cycle

Nomination

Initiation

Planning

Execution

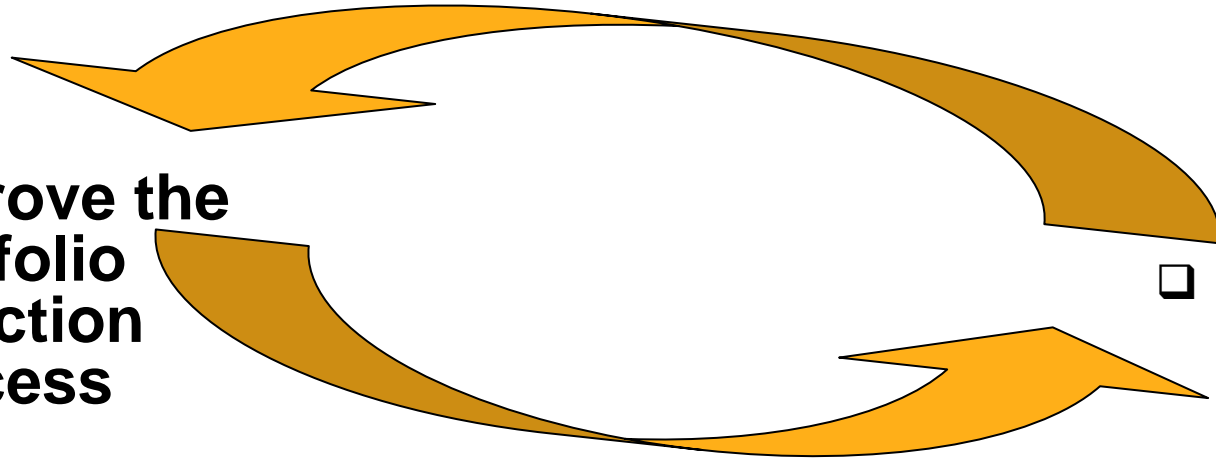
Closing

Operations

Project Start

❑ Provide guidance to project teams

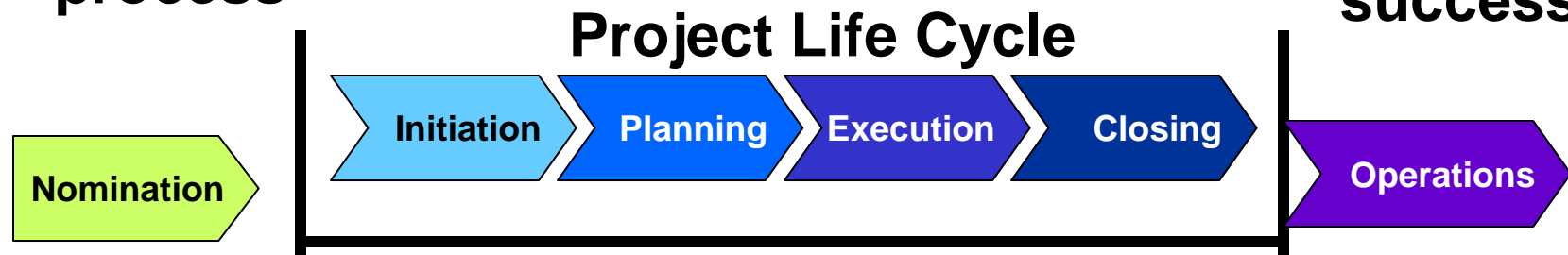
Project End



The Ultimate Goal

- ❑ Improve the portfolio selection process

- ❑ Track and measure success



Project Start

Project End

- ❑ Provide guidance to project teams

There are no mistakes or failures, only lessons.

Dennis Waitley

Questions?

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