


# What Have We Really Learned From Lessons Learned?

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# What Have We Really Learned From Lessons Learned?

- Not Much 
  - We don't consistently collect Lessons Learned
  - We don't have practical access to our documented Lessons, nor to Lessons from others
  - We learn primarily from our own experiences, from what we remember
- We can do better!



# PMBOK® Guide – 4<sup>th</sup> Edition

- Closing Process Group, Project Integration Management, 4.6 Close Project or Phase
  - Organizational Process Assets Updates
    - Historical information and lessons learned are transferred to the lessons learned knowledge base for use by future projects or phases. This can include information on issues and risks as well as techniques that worked well that can be applied to future projects.

# Challenges

- Motivation
  - Lack of motivation or incentive to initiate and complete lessons learned
  - Others usually don't want to participate
- Mechanisms
  - Typical office systems and tools are not conducive to capturing or accessing lessons learned
  - A knowledge base is difficult to implement

# Motivation Problems

- When project is coming to a close, recognize people's attitudes
- Heavily influenced by good or bad project
- Some don't want to the project to end
  - Energy, Chaos, Thrill
  - Anti-climactic
  - Sense of identity
  - Feeling a sense of loss of purpose or relationships
  - May not have another job
- Some want to get out as soon as possible
  - Want to move on to something new
  - High stress from difficult project, people, or recent implementation
  - Personality conflicts, stress, many hours

# Motivation Problems

- Naming the end of the project...
- Closure – sense of finality; ending of a grieving period or the end of a relationship
  - Cease, Termination, Desistance, Shut Down
  - Plug, Seal, Blockage
- Post Project Review
- Post Project Audit
- Project Implementation Audit
- Project Evaluation – External, uneducated reviewer
- After Action Review or Report – Army , often used in training
- Ventilation and Evaluation – Crisis Management



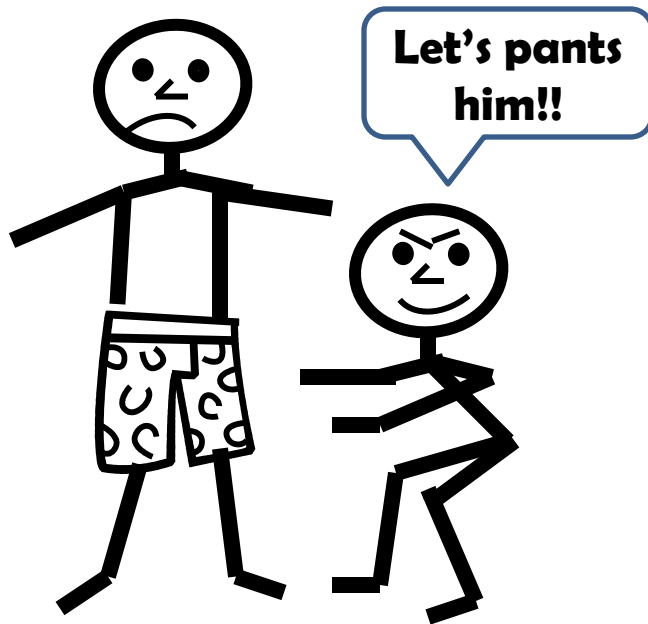
# Motivation Problems

- Post-mortem
  - Review after death; examination of a corpse to determine cause of death
  - “We know why the project died. Let’s just bury it.”
- Retrospect Investigation of Project - RIP



# Motivation Problems

- Project Debrief
  - Fully clothed reviews are more appropriate

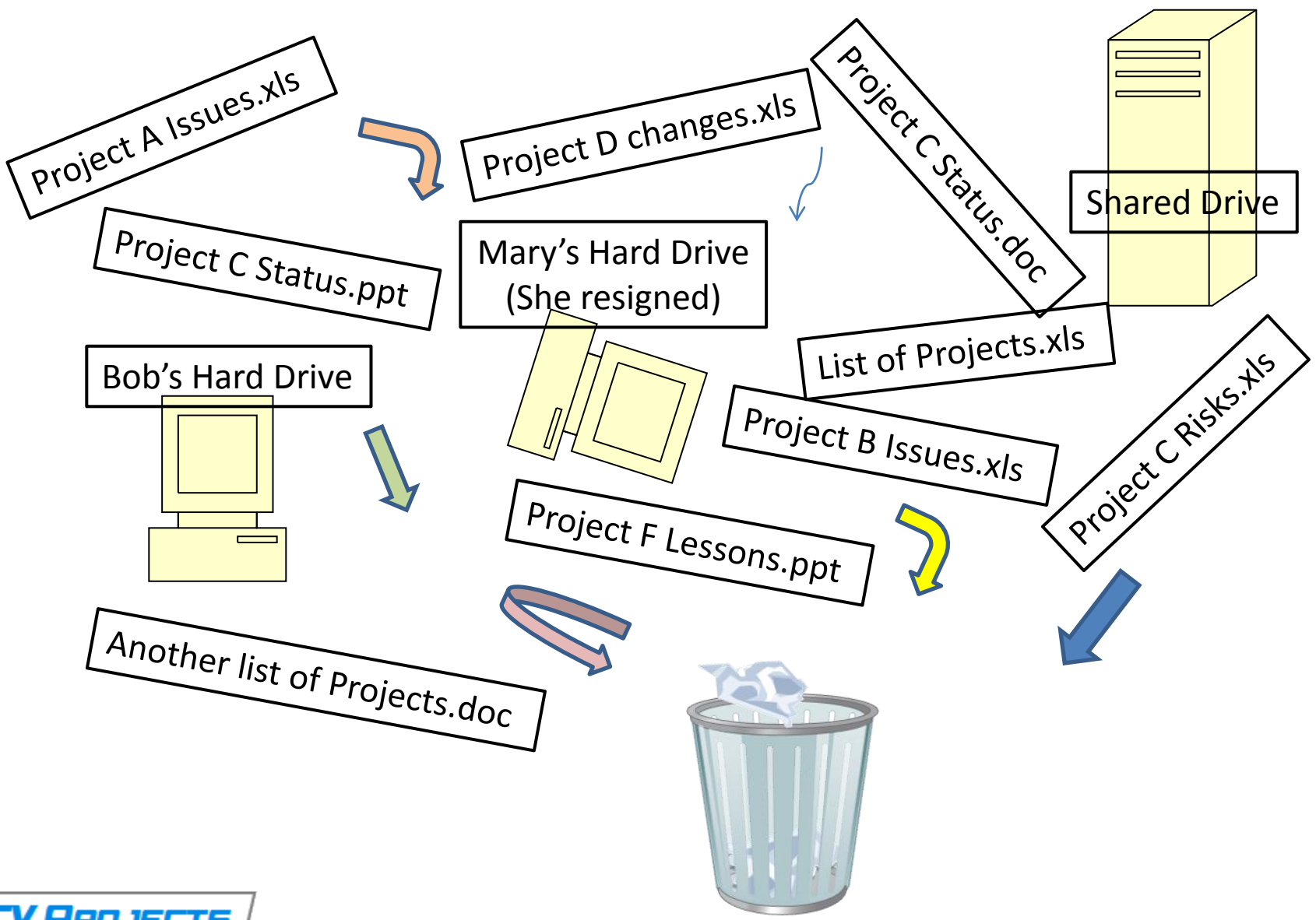


# Motivation Problems

- Reluctance to participate
- Hate doing documentation
- Facing the facts – budget or product problems
- Fearful of Blame
- Audit, Driven by separate group or PMO
- Often resent outsider involvement
  - I don't need anyone telling me what was wrong. We already know the problems.
  - They're getting involved now!?! Where were they when we needed help?
- Why bother?
  - Nobody reads it anyway
  - Nothing new will result from it
  - It will just get lost or thrown away
  - Face it, the project is over. A year from now, no one will remember it.

What have we really learned from lessons learned?

# Mechanisms



# Mechanisms

- Excel, Word, Powerpoint, Access
- Sharepoint, Documentum eRoom
- Shared Drives
- PPM Tools usually Risks, Issues, Changes
- Printed, bound books
- Usually not integrated, not able to search by content, not able to search across projects
- Usually gets lost

# After Action Reviews

- Are conducted during or immediately after each event.
- Focus on intended training objectives.
- Focus on soldier, leader, and unit performance.
- Involve all participants in the discussion.
- Use open-ended questions.
- Are related to specific standards.
- Determine strengths and weaknesses.
- Link performance to subsequent training.

## AAR Observation Worksheet

Training/exercise title:

Event:

Date/time:

Location of observation:

Observation (player/trainer action):

Discussion (tied to task and standard if possible):

Conclusions:

Recommendations (indicate how the unit could have executed the task(s) better or describe training the unit will need to improve future performances):

# Checkpoint with Dawn

- So what have we learned so far?
- How many of you...
  - Believe lessons learned are important to capture?
  - Agree that there can be challenges in motivating people to participate?
  - Would like to hear some proven techniques for overcoming some of these challenges and creating high quality lessons learned?

# Preparing for a Lesson Session

- Post Project Meetings usually review schedule, budget, metrics, what went right, what went wrong, lessons learned
- You are looking for specifics
  - What went right
  - What was challenging
  - SUGGESTIONS for improvement that are ACTIONABLE!
- Determine how to solicit lessons learned
  - Discussion Meeting
  - Anonymous Solicitation
  - Summarize with Review Meeting and/or Publication
- Easy with well formed team – openness, honesty, trust
  - On a good team with open communications, problems are already known. Session is just a review to formalize and make improvements
- Include as part of the project celebration; make it entertaining
- Large Projects – Recommend separate sessions based on subteams; Project Leadership, Sponsor & Executives, PMO, Sub-contractors & Vendors, Project Team

# Preparing for a Lesson Session

- Who will Facilitate?
  - Project Manager, 3rd Party Facilitator (objective), PMO
  - Establish ground rules
- If Lessons are done throughout project, no surprises. System or database to enter lessons at any time helps immensely.
- If lessons (or gripes) result in process changes, more willing to participate
- If no one wants to participate, Project Manager should do it anyway, alone if necessary, gathering feedback through less obvious means like lunch discussions

# Techniques to Gather Lessons

- PMBOK Guide 4<sup>th</sup> Edition, Collecting Requirements
  - Interviews, Focus Groups, Facilitated Workshops, Group Creativity Techniques, Group Decision Making Techniques, Questions and Surveys, Observations, Prototypes
- Group Creativity Techniques
  - Brainstorming
  - Electronic Brainstorming – Solicit with email; can be anonymous
  - Nominal Group Technique - voting to determine ideas to discuss further or prioritize
  - Delphi Technique – experts answer questionnaires, facilitator summarizes, experts discuss and refine answers
  - Idea or Mind Mapping
  - Affinity Technique or Diagram
    - Write ideas on Sticky Notes, Group related ideas on the wall (silently), Title or Categorize the groups
    - Good for Requirements, WBS, Risks, Lessons
    - Can be anonymous

# Techniques to Determine Actions

- Group Decision Making Techniques
  - Unanimity – All agree on single course of action
  - Majority – more than 50%
  - Plurality – largest group decides, even if not majority
  - Dictatorship – one person decides for the group

# Formalizing the Lessons Learned

- Capture the discussions
  - Whiteboard, flip charts, sticky notes, on screen (Excel, System)
  - Refine & Summarize
  - Decide what to recommend as a procedural changes, for all projects
  - Thank everyone for participating
- Publish the results and make accessible to all
- Follow through with process changes
- Use the Lessons Learned with future projects

# Lessons Session Tips

- Ground rules (e.g., one voice at a time, all ideas are good)
- Come prepared
- Be objective and if you have trouble with this, ask someone else to facilitate
- Create high quality lessons learned
  - Specific
  - Action recommendations

# Lessons Session Tips

- Example: “There were so many defects in the testing phase, it was ridiculous”
- Remember – the benefit of this is that later you can do something about it!
- Facilitator questions:
  - Is there anything good about the testing phase we should ensure we do again?
  - What should we do differently that could have prevented this from happening?
- Create high quality lessons learned
  - Specific
  - Action recommendations

# Lessons Capture Tips

From “There were so many defects in the testing phase, it was ridiculous”, to this:

Title	Description	Date Entered	Contributor	Categories
Over 1,000 defects were found during testing phase	+ Important to take the time to conduct formal testing phase managed by a quality professional (rather than have the developers put the product right into production)	11/7/2009	Dawn Mahan	Project Management, Scope, Schedule, Technical, Staffing
Over 1,000 defects were found during testing phase	+ While we had no idea how many defects would be found, it was fortunate that we had implemented a quality management tool rather than Excel which is typically used. We wouldn't have been able to manage this by spreadsheets as effectively given the volume of defects and number of people required to test and fix. Lesson: Insist a quality tool like Mercury be used for projects like this or for implementing other "immature" software or software where we don't have a lot of experience. The license fees were well worth it.	11/7/2009	Dawn Mahan	Project Management, Budget, Equipment
Over 1,000 defects were found during testing phase	- While it is important to capture all defects, some team members needed better training in being able to spot a "real" defect as per written requirements vs. desired changes. Next time, 1) Ensure requirements are written to be specific 2) turnover to developers includes a discussion and 3) For new Business Analyst's, more training is conducted to help them understand what is real vs desired	11/7/2009	Dawn Mahan	Project Management, Scope, Schedule, Budget, Technical, Staffing
Over 1,000 defects were found during testing phase	- Some of the many defects were because many times fixes resulted in a break of something else. For immature, complex and/or not well understood software, ensure that there are enough developers who are EXPERIENCED rather than junior.	11/7/2009	Dawn Mahan	Project Management, Budget, Technical, Staffing

# Our Lessons Session

- Many sessions if unmanaged are “gripe” sessions...keep it positive
- Let’s practice together and learn from each other at the same time by gathering some lessons from your successful projects
  - We are a team who have not yet gotten to “performing”
  - Think of a project you were a part of that was really great
  - What was one item that you would recommend we do again when we embark on a similar project

# Capture

- Project List
- Knowledge Search
- Import
- User Admin

ABC Corp

Bob CIO [logout] My Account | Help

[Project](#)
[Dashboard](#)
[Milestones](#)
[Risks](#)
[Issues](#)
[Changes](#)
[Lessons](#)
[Choose Another Project](#)

Lessons Learned for **Breakout 1** Project

Title	Description	Date Entered	Contributor	Categories
Strong Executive Sponsorship	Recommend monthly reviews with executive sponsors/committee, and ensure they are available for issue resolution.	11/7/2009	Bob CIO	Executive Management, Staffing
Accountability & Honesty	In depth roles/responsibility, with realistic and clear expectations. Set project values up front. RACI Matrix.	11/7/2009	Bob CIO	Project Management, Staffing

Add New Lesson Learned

# Search

Risks Found							
ID	Description	Status	Date Entered	Prob.	Imp.	Rating	Categories
<b>Project: ABC Launch</b>							
4	Inability to support long-term if many customers <i>Response: Outsource</i>	Pending	7/16/2007	M	M	4	Staffing

Lessons Learned Found					
Title	Description	Date Entered	Contributor	Categories	
<b>Project: ABC Launch</b>					
Learning New Technology	It's difficult for most to learn and transition from previous architecture with spare time learning. Prescribe dedicated training and a "mentor", and allocate time to learn and do a project.	7/16/2007	Bob CIO	Technical, Staffing	
<b>Project: Breakout 1</b>					
Strong Executive Sponsorship	Recommnd monthly reviews with executive sponors/committee, and ensure they are available for issue resolution.	11/7/2009	Bob CIO	Executive Management, Staffing	
Accountability & Honesty	In depth roles/responsibility, with realistic and clear expectations. Set project values up front. RACI Matrix.	11/7/2009	Bob CIO	Project Management, Staffing	
<b>Project: Breakout 2</b>					
Appropriate Resource	Ensure that correct skilled technical resources are assigned, particularly with a tight deadline. Keep team together for future projects if possible.	11/7/2009	Bob CIO	Budget, Technical, Staffing	
Co-locate Team	Keep team together with dedicated facilities to build a sense of community, faciliate communications and learning, improves efficiency, and accountability.	11/7/2009	Bob CIO	Executive Management, Staffing, Equipment	

# Recap

- Elite organizations learn from their experiences
  - Create high quality lessons learned – specific and actionable
  - Share lessons across projects
  - Implement recommendations

# Summary

- Determine the best way to ensure participation
- Provide a mechanism to easily capture and find lessons learned
- Encourage submitting Lessons throughout the project, not only at Closure
- Act on suggestions from the team in the next project or with organizational process change