

Conducting and Facilitating Lessons Learned

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**INTERNATIONAL INSTITUTE
FOR LEARNING, INC.**

IMPROVING ORGANIZATIONAL PERFORMANCE WITH
INTELLIGENCE, INTEGRITY AND INNOVATION

Welcome!



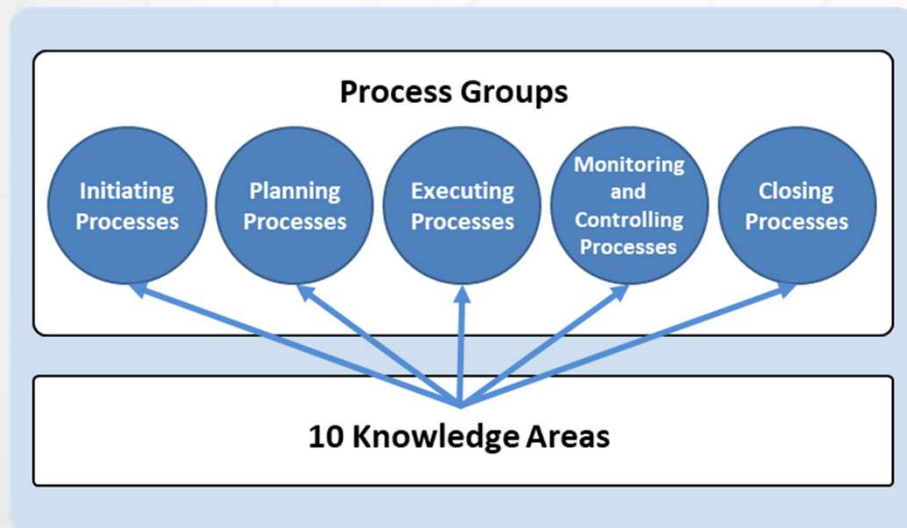
The goal of this webinar is to discuss the principles of Lessons Learned in the context of Project Management. Lessons Learned are used primarily for:

1. Documenting results
2. Process improvement

Document Lessons Through *PMBOK*® *Guide*'s Process Groups & Knowledge Areas

The 10 project management knowledge areas are:

- Project Integration Management
- Project Scope Management
- Project Schedule Management
- Project Cost Management
- Project Quality Management
- Project Resource Management
- Project Communications Management
- Project Risk Management
- Project Procurement Management
- Project Stakeholder Management



Adapted from
PMBOK® *Guide* – Sixth Edition, Part 1, Fig.1-5, p. 18

Adapted from
PMBOK® *Guide* – Sixth Edition, Part I, Table 1-4, p. 25

Rationale for Using Process Groups

- **Initiating:** To judge whether the needs assessment conducted was appropriate
- **Planning:** To determine if kickoff meeting involved the correct participants
- **Executing:** To analyze the productivity of project team members
- **Monitoring/Controlling:** To verify if validation activities followed procedures
- **Closing:** To review records management efficiencies



Rationale for Using Knowledge Areas (1 of 2)

Project Integration Management

To score specific project components to develop a dashboard

Project Scope Management

To understand if scope creep occurred

Project Schedule Management

To construct new network diagrams to address fast-tracking/crashing

Project Cost Management

To calculate earned value based on time points/milestones

Project Quality Management

To define new standards for the balanced scorecard

Rationale for Using Knowledge Areas (2 of 2)

Project Resource Management

To improve the format of the job description template

Project Communications Management

To determine preference for information distribution

Project Risk Management

To find out if there was the right amount of insurance for the project

Project Procurement Management

To estimate potential savings using another contract type

Project Stakeholder Management

To verify stakeholders' needs and expectations are being met

Knowledge Area Dimensions

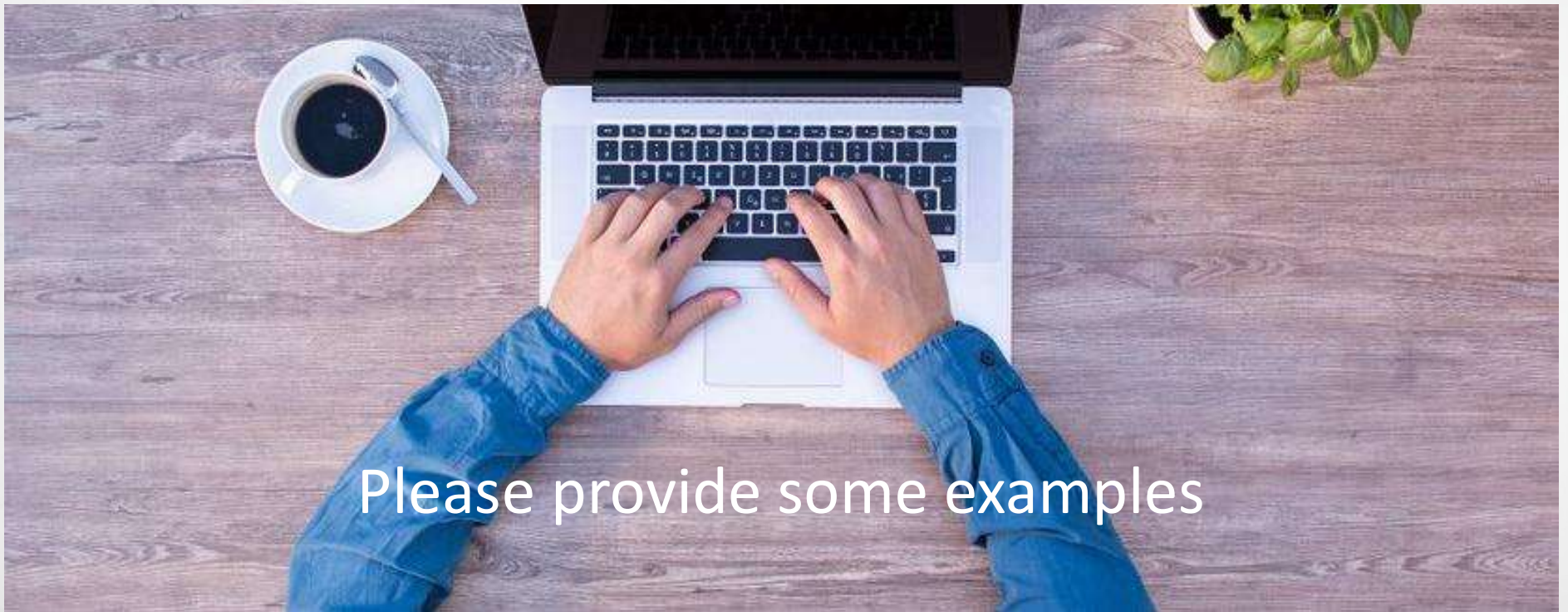
Lessons Learned should capture *key knowledge gained* throughout the project's life cycle (initiation through closure).

This should include the knowledge area components as depicted on the right.



Adapted from Frigenti, Enzo, and Dennis Comninos. *The Practice of Project Management: a Guide to the Business-Focused Approach*. Kogan Page, 2006. p. 39

What Lessons Learned Have you Captured from your Projects?



Project, Evaluation, and Lessons Learned Defined

A project is temporary, unique and undertaken for a specific purpose:

- Product,
- Service, or
- Result

An evaluation involves the determination of:

- Merit (quality),
- Worth (value), or
- Significance (importance)

Lessons Learned is a form of project evaluation that reviews:

- What went right?
- What went wrong?
- What could have been done differently?



Two Dimensions of Lessons Learned



Summative

- A detailed analysis intended to judge the effectiveness of an activity in terms of its outcome or impact, i.e., to determine accountability
 - *Looking at things through the rear-view mirror*



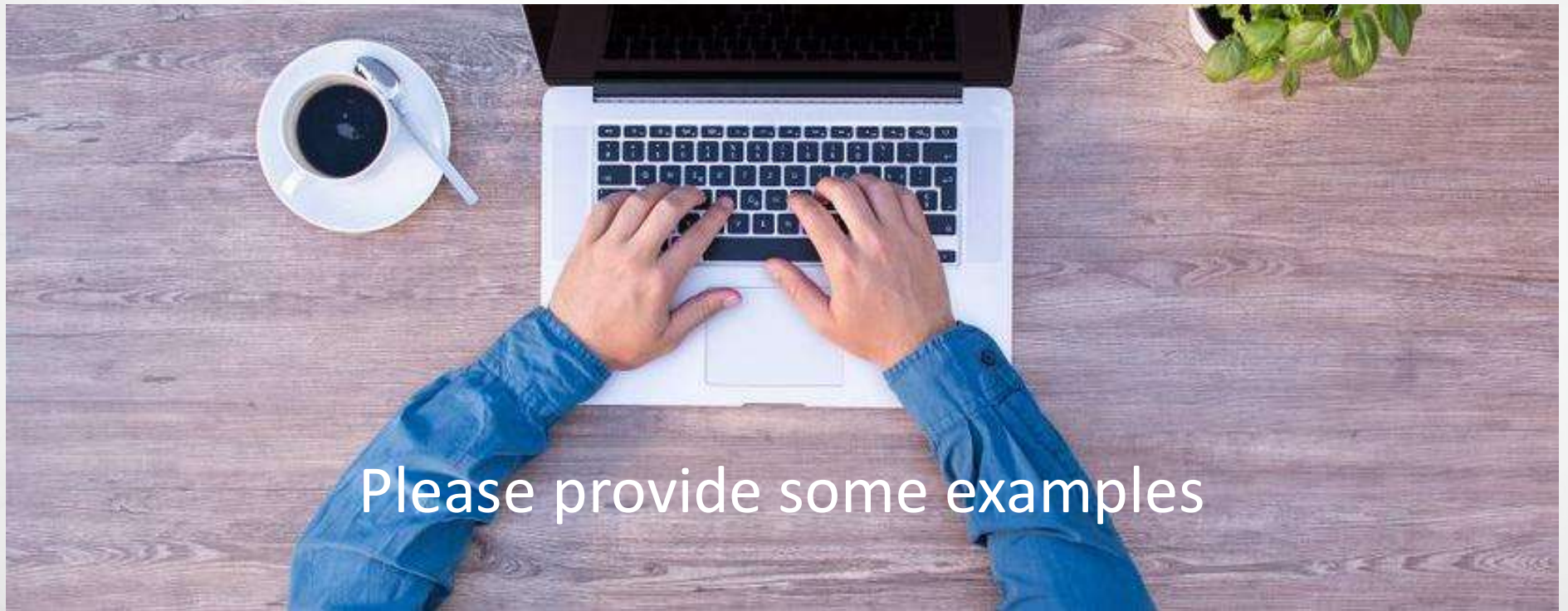
Formative

- A comprehensive review designed to support process improvement, i.e., future implementations of a project
 - *Viewing upcoming things through the windshield*

Common Names for Lessons Learned



How Do you Refer to Lessons Learned?



What are the Characteristics of a Lesson?

- A designated period of time where learning is intended to occur
- A task assigned for individual study
- An experience that is potentially applicable to future related events
- A meaningful exchange of knowledge that can be reused
- An event that has consequences – positive or negative
- An understandable, tangible, recordable fact
- An item that can be captured, traced or tracked
- An issue that changes thinking or behavior

Some project information may not be a lesson at all!

What is Meant by Learned?

Capturing of data into a:

- Logical database

Systems that support translating data into useable information:

- Reports

Acquisition of knowledge:

- Explicit (codifiable): how to use software

Being able to apply understanding:

- Deriving the correct interpretation

Ability to make a decision

- Avoid the same mistakes



Example of a Lesson Learned

- The Fixed Price Incentive Fee (FPIF) contract awarded to John Doe construction, when reviewed, was 50% higher than the estimated cost of a Time and Materials (T&M) contract
- In the future, we will more carefully analyze all pricing models before awarding a contract



What are NOT Lessons?

Information may arise during the Lessons Learned collection process that may not be lessons at all, such as:

Non-lessons: experiences with NO KEY LESSONS LEARNED.

- Using selected project-related occurrences to place blame:
 - John Doe's attitude in last week's meeting regarding the budget is justification for not putting him on the next project

Non-facts: partial data, misperceptions or skewed inferences

- Using project events to draw incorrect conclusions:
 - Due to challenges experienced during the initiating phase of this project, we can assume the same headaches will occur during the closure phase

Encouraging a Healthy Environment for Lessons Learned



A learning organization (company, business, institution, agency, association, etc.) continuously captures the learning experiences of its members (employees, vendors, customers, etc.) and transforms itself through these documented lessons.

The philosophical approach to Lessons Learned requires that an organization is open to:

- Honesty
- Openness
- Change

Facilitating Lessons Learned

Who should facilitate Lessons Learned?

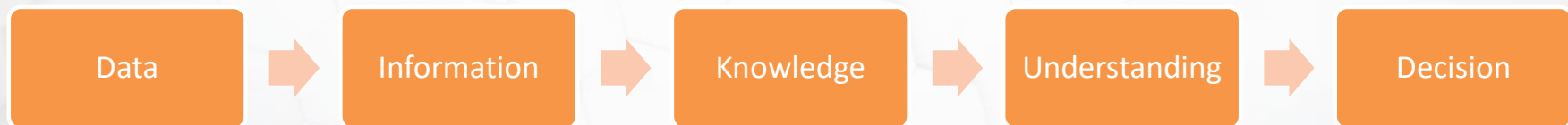
A person or team who has:

- A chosen methodology of project management principles, i.e.,
 - PMI
 - PRINCE2®
- A comprehensive understanding of project evaluation
- A working knowledge of research and measurement
- An awareness of the DIKUD continuum...



Deriving Lessons: Data – Decision Continuum

- **Data** is the source material in the form of facts or non-facts that serve as a basis for generating information
- **Information** is a product of data that has been processed into a form understandable by its intended audience
- **Knowledge** is ways of knowing obtained through sensory experience (e.g., seeing, hearing, smelling, sensing, tasting or feeling)
- **Understanding** is the ability to interpret knowledge
- **Decision** is the tools and techniques applied to understanding



PMI Lessons Learned Findings

- In 2007, PMI engaged in a comprehensive research study involving the use of Lessons Learned within 500 organizations
- According to the researcher Terry Williams, PhD, approximately half of organizations surveyed stated:
 - Their projects were more successful because of implementing Lessons Learned
 - Storing Lessons Learned in a well-indexed database is important
 - Lessons Learned from projects are implemented into the organization's processes

Williams, Terry. *Post-Project Reviews to Gain Effective Lessons Learned*. Project Management Institute, 2007.



Lessons Learned References



Some texts discuss Lessons Learned in the context of how to avoid the same or similar mistakes.

The focus is on documenting results or accountability (SUMMATIVE).

Other texts outline what can be done to improve processes or systems (FORMATIVE).

Samples:

- Kozak-Holland, Mark. *Avoiding Project Disaster: Titanic Lessons for IT Executives*. Multi-Media Publications, 2006.
- Kaner, Cem, et al. *Lessons Learned in Software Testing: a Context Driven Approach*. Wiley, 2002.

PMI Articles Pertaining to Lessons Learned

- Alderton, M. (2019). *Silver Linings: Capturing Lessons Learned Can Help Teams Turn Project Failure into Long-Term Project Success*. PM Network, 33(6), 56–63.
- Berke, M. (2001). *Best practices lessons learned (BPLL): A view from the trenches*. Proceedings from the Project Management Institute. Philadelphia, PA: Project Management Institute.
- Corrective Measures: We Asked the Project Management Community: What Lesson Did You Learn from a Project Management Mistake? (2017). PM Network, 31(2), 20–21.
- Fister Gale, S. (2011). A series of unfortunate events. PM Network, 25(1), 22–29.
- Ladika, S. (2008). By focusing on lessons learned; project managers can avoid repeating the same old mistakes. PM Network, February.
- Pitagorsky, G. (2000). *Lessons learned through process thinking and review*. PM Network. March, 35-38. Philadelphia, PA: Project Management Institute.
- Rowe, S., & Sikes, S. (2006). *Lessons learned: Taking it to the next level*. PMI Global Congress Proceedings. Seattle Washington. Philadelphia, PA: Project Management Institute.
- Whitten, N. (2007). In hindsight: *Post project reviews can help companies see what went wrong and right*. PM Network, 21.
- Williams, T., Eden, C., Ackermann, F., & Howick, S. (2001). *The use of project post-mortems*. Proceedings of the Project management Institute Annual Seminars and Symposium. November. Philadelphia, PA: Project Management Institute.
- Zwerman, B., Thomas, J., Haydt, S., & Williams, T. (2004). *Professionalization of project management: Exploring the past to map the future*. Philadelphia, PA: Project Management Institute.

Lessons Learned Process



Tools: Lessons Learned Matrix

	INITIATING	PLANNING	EXECUTING	MONITORING / CONTROLLING	CLOSING	In Your Opinion
Project Integration Management						Was done right
						Was done wrong
						Would do differently
Project Scope Management						Was done right
						Was done wrong
						Would do differently
Project Schedule Management						Was done right
						Was done wrong
						Would do differently
Project Cost Management						Was done right
						Was done wrong
						Would do differently
Project Quality Management						Was done right
						Was done wrong
						Would do differently
Project Resource Management						Was done right
						Was done wrong
						Would do differently
Project Communications Management						Was done right
						Was done wrong
						Would do differently
Project Risk Management						Was done right
						Was done wrong
						Would do differently
Project Procurement Management						Was done right
						Was done wrong
						Would do differently
Project Stakeholder Management						Was done right
						Was done wrong
						Would do differently

This form can be used to capture lessons learned during a brainstorming session and then transferred to a repository.



Techniques: Lessons Learned (LL) Repositories

To ensure that LL are accessible, systems must be established to allow for storage and retrieval. A repository is a storage location for LL, which can be paper-based or electronic (digitally stored).

- Shared folders: Network hard drive
 - E-room
 - MS-SharePoint
- Personal computer: Local hard drive
- CD / Optical Disc
- Magnetic Tape
- Flash Drive
- Microfilm / microfiche

LL repositories can be:

- Private – contained within the organization
- Public – accessible external to the organization

Questions?

