



Capturing Those Lessons Learned

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Do you capture your lessons learned? If you do, how effectively do you capture them?

There are many reasons why lessons learned are not captured, or, if they are captured, not used, including:

- Lack of time
- Lack of management support
- Lack of resources
- Lack of clear guidelines around collecting lessons learned
- Lack of processes to capture lessons learned
- Lack of knowledge base to store and search lessons learned for future use

We all have good intentions to do so, but often don't get around to effectively capturing lessons learned from projects. Often, if we do try to capture lessons learned, we do so at the very end of the project – getting the team together to try to remember what worked and what didn't. With short projects – maybe just a few weeks in duration – this might work well some of the time. The team hasn't forgotten anything. Just catch them before they are off to the next project!

For longer projects though, it is difficult to wait until the end to attempt to capture the lessons learned. Too often team members are ready to move on, or they have forgotten much of what should likely be captured. Better to track lessons learned throughout the project, as much as possible. For example, track the following as it occurs on the project, including the team's response to the situation, the resolution/outcome, and comments:

- Risks or issues
- Quality defects
- Vendor issues
- Change requests

By tracking these situations throughout the project, everything is fresh in your head as it has just occurred. You can then compile the information at the end and develop a more comprehensive lessons learned.



Other areas worth capturing on projects, detailing what worked well and where improvement is needed include:

- Requirements management
- Scope management
- Schedule development and management
- Cost estimating and budget control
- Quality planning and management
- Resource allocation
- Teamwork/team performance
- Problem solving/issue resolution processes
- Communication management
- Stakeholder identification and management
- Status reporting
- Risk identification and management
- Procurement planning and management/vendor management
- Process improvement initiatives
- Change management process

Detail also areas where the team performed exceptionally on the project and areas where improvement is needed. Delineate options for improvement – be specific.

Sample Template

Here is a simple template you may find of use in capturing lessons learned. Customize the template to include components important to your project.

Project Name:				Date:		
Project Manager:				Team Members:		
Area (Process) Reviewed	Situation/ Issue that Occurred	Actions taken/ alternatives considered	What Worked Well	What Can Be Improved	Comments	Shared Learning
<i>Customize for project components/ processes/tasks relevant to your company</i>	<i>Was there a specific issue – how did it impact the project</i>	<i>What did you do to fix the situation/ issue that occurred; what alternatives were considered</i>	<i>Delineate what worked well on the project – be specific</i>	<i>Delineate areas/ alternatives for improvement. Be specific; offer suggestions around improvement</i>	<i>Additional information that may be helpful to others on future projects</i>	<i>Add here advice for future teams based on what your project team learned</i>
Requirements management						



Scope management						
Schedule development/ management						
Cost estimating/ budget control						
Quality planning/ management						
Resource allocation						
Teamwork/ team performance						
Problem solving/ issue resolution						
Communication management						
Stakeholder identification/ management						
Status reporting						
Risk identification/ management						
Procurement planning/ management and vendor management						
Process improvement initiatives						



Change management processes						

Lessons Learned Captured? Your Job’s Not Done!

Once you have captured lessons learned – make sure they are easily referenced by other project teams. Keep them in a location where they can be easily found and searched – maybe a project portal or intranet site. Start every project by accessing past project lessons learned. Track improved effectiveness and efficiencies on projects based on applying the lessons learned from past projects. In this way, the lessons learned from past projects help to increase the success of future projects. Make a component of every project a requirement to review the lessons learned from past projects.

Summary

Capturing lessons learned is of vital importance. Unfortunately, it is often forgotten at the end of the project – people just want to move on to the next assignment. By assigning an individual on the project (ideally an individual trained in capturing lessons learned) to lead the capture of lessons learned from the beginning of the project, and tracking throughout all the stages of the project, you won’t feel so pressured at the end to fit it in.

The more mature the project management function within the organization, the more likely that lessons learned are captured, internalized and applied to all future projects. Effective transfer of knowledge from lessons learned is not solely to other project teams, but also to the organization as a whole. These organizations which are more mature will capture lessons learned not just from the project team, but also from customers, contractors, and other internal staff. These organizations likely also have a formal process to capture lessons learned to ensure there are consistencies among all project teams.

Resource: **Post-Project Reviews to Gain Effective Lessons Learned** (Terry Williams)