Lessons Learned: Taking it to the Next Level

Sandra F. Rowe, PMP, MBA, MSCIS
Trouble Projects Specific Interest Group, VP
Finance & Lessons Learned PM

Sharon Sikes, PMP
Trouble Projects Specific Interest Group
President/Chair

Session # PMT01
Session Objectives

• Suggest a methodology for the capture, classification, storage and dissemination of lessons learned
• Discuss lessons learned tools and techniques
• Discuss the importance of generating metrics and how the use of metrics can lead to sustained cultural change.
Session Outline

• Lessons Learned Overview
• Level 1: Lessons Learned Process
• Level 2: Evaluation of Lessons Learned Repository
• Level 3: Metrics
• Achieving the Next Level
Lessons Learned Defined

The learning gained from the process of performing the project. Lessons learned may be identified at any point. Also considered a project record, to be included in the lessons learned knowledge base.

Source: Adopted from the *PMBOK® Guide* -Third Edition
Learning

• Who learns?
  – Project managers, team members, leadership

• What can be learned?
  – Project management processes and tools
  – Technical work of the project
  – Business processes
  – Leadership and teamwork
Common Beliefs

- Every project is different and learning from one project is not applicable to other projects
- There is not enough time for learning. We have to complete the project.
- Nothing ever happens after lessons learned are captured.
What does it take for a culture to support lessons learned?
Level 1: Lessons Learned Process
Level 1 Overview

- Organizations are not routinely capturing lessons learned
- Organizations do not have a lessons learned process
Lessons Learned Process

- **Identify**: Identify comments and recommendations that could be valuable for future projects.
- **Document**: Document and share findings.
- **Analyze**: Analyze for application of results.
- **Store**: Store in a repository.
- **Retrieve**: Retrieve for use on current projects.
Identify Lessons Learns

- Select participants
- Facilitator should prepare in advance
- Always ask the three key questions
  - What did we do right?
  - What did we do wrong?
  - What do we need to improve?
Document Lessons Learned

- Lessons learned session notes
- Findings summary
- Post-project report
- Store lessons learned reports with project documentation
Analyze Lessons Learned

- Determine process improvements
- Determine training needs/update existing training programs
- Determine which lessons should be communicated to other teams and how this communication will occur
Store Lessons Learned

- No formal repository exists
- Store lessons learned in a project library
Retrieve Lessons Learned

• Rarely used during Level 1
• Informal
  – Review lessons learned before starting a new project
  – Share information with the team
  – Risk mitigation
Level 2: Evaluation of Lessons Learned Repository
Level 2 Overview

• Organizations have a defined process and basic tools for identifying and documenting lessons learned

• Organizations are capturing lessons learned but they are not fully utilizing them
Consistency

• Review lessons learned at the beginning of the project
• Effective tools for capturing lessons learned
• More analysis of stored lessons learned
# Project Evaluation

## Scope

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>SA</th>
<th>A</th>
<th>N</th>
<th>D</th>
<th>SD</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>The business case was sound.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.2</td>
<td>Project vision, objectives, requirements, assumptions and constraints were clear.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.3</td>
<td>Success and acceptance criteria (sustainability: knowledge transfer and support) was clear.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.4</td>
<td>The deliverables list was complete.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Cost

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>SA</th>
<th>A</th>
<th>N</th>
<th>D</th>
<th>SD</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>The budget was based upon a realistic estimate.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.2</td>
<td>Estimates and/or prices were accurate.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.3</td>
<td>Cost control was sufficient.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

SA – Strongly Agree, A – Agree, N – Neutral, D – Disagree, SD – Strongly Disagree, NA – Not Applicable
Project Questions

1. How could we have improved our estimate of size and effort of our project?
2. Describe any early warning signs of problems that occurred later in the project?
3. Were our constraints, limitations, and requirements made clear to all vendors/contractors from the beginning?
Key Questions

1. What went right?
2. What went wrong?
3. What needs to be improved?
Post-Project Review Report

• Background and objective
• Lessons learned process overview
• Summary of results
  – Project strengths – what went well
  – Project weaknesses – what went wrong
  – Recommendations – what we need to improve
• Detailed results by knowledge area or category
• Next steps
More Analysis

- Lessons Learned Input Template
- The Lessons Learned Repository
Lessons Learned Input Template

• Category
• Lesson learned
• Action taken
• How did you arrive at the action
• Root cause
• Key words
Key Words

- Data fields to aid search
- One of the determinants of success in utilizing lessons learned
- Key words: vendor, process improvement, software upgrade
What Is the Best Tool?

• There is no one answer
• Work with Company software currently available
• Must have reasonable access across the Company’s intranet or LAN
Successful Software Tool

- Establish standard template to capture lessons learned information
- Create easy to use software screens for data entry
- Create easy to use search capability on key data fields and key words
- Develop easy to read output reports
- Provide ability to generate metrics reports
Lessons Learned Tool Examples

• IBM: LotusNotes
• Novel: Linux Systems, Linux Desktop, OpenOffice, iFolder
• Microsoft: SharePoint, Word, Excel, Access
• Oracle
Level 3: Metrics
Level 3 Overview

- Organizations have identified process and templates in place
- Analysis of data occurs
- Consistency with identifying and reporting lessons learned
Metrics

- Organizations need to take the completed analysis and convert that data to metrics that are important to its executive level action approvers
- Metrics help identify important events and trends
What are Metrics?

• The assignment of numbers, ratings, or ranks based on instruments that characterize and quantify selected attributes
• Indicates formalized project management
• Designed to measure project success
Reporting Metrics

• Executive-level lessons learned report
• Graphical presentations
• Remember your audience
• Sustained cultural change
Achieving the Next Level

• Have a documented lessons learned process with supporting tools
• Capturing lessons learned should be an expected deliverable
• Use lessons learned to generate best practices
• Have management commitment
PROJECT SUCCESS
Contact Information

Sandra Rowe, PMP
Trouble Projects Specific Interest Group
vp-finance @tpsig.org or lessons @tpsig.org

Sharon Sikes, PMP
Trouble Projects Specific Interest Group
pres @tpsig.org

www.tpsig.org

Session # PMT01