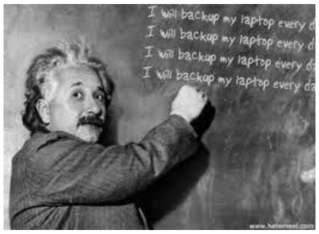

Top 10 Tips for Your "Lessons Learned" Review

By Kathleen Coyle, Partners HealthCare System

Business organizations and teams that produce excellence are those that work hard and continuously improve. One technique used to evaluate and perfect future results is called a "Lessons Learned" review *(sometimes referred to as after-action or post-project review)*. To harness the power of continuous improvement for your organization, read on for tips and techniques for planning and running Lessons Learned reviews that are well worth the time and energy you put into them.

1. Determine when to conduct a Lessons Learned review. Lessons Learned reviews are appropriate anytime you feel that valuable learning can be achieved. This may include when you:

- reach the end of a project or a key milestone
- identify an "on-the-spot" learning opportunity
- utilize a new process or technology
- initiate a similar project
- identify a highly successful project, especially one with unique characteristics
- identify a project that faced numerous challenges, and perhaps even failures
- engage new groups of people to work together
- complete several similar projects (or a year's worth of work)

2. Initiate and set the right tone. As a manager or project leader, take the initiative to request a Lessons Learned review when appropriate. It will give you the chance to lead an honest dialogue about best practices *(things that should be repeated)* and project challenges and necessary improvement solutions *(what needs to be done differently next time).* You should welcome everyone to the session and state the goal. After that, review meeting norms and ground rules. Focus on learning and continuous improvement e.g., what worked well, what didn't (without blame) and what can be done differently. An ice-breaker can help establish a conversational tone that's conducive to open sharing and learning. One example: Start by acknowledging one thing you might do differently next time, and why.

3. Consider a neutral facilitator and note taker. Most teams benefit from having a facilitator and note taker who are not part of the team. Besides being viewed as impartial, a skilled facilitator can help manage the dialogue, the participants, and the time. If you engage outside support, it is critical to bring the facilitator up to speed on the project and the participants. One or more key members of the project should partner with the facilitator to design and lead the review. Alternatively, ask a respected colleague from another team to lead your session.

4. Determine the appropriate level of effort and timing needed. How much value will the Lessons Learned bring to future work? (If none, don't hold one! An adjournment or celebratory session may be more appropriate.) Are there significant unresolved challenges or differences of opinion where progress can be made by discussing them? Should the project go further than it has? Who will take what actions following the Lessons Learned review so that outcomes are applied? Answers to questions like these will help you select the best approach and determine the time necessary for adequate problem solving. If time is very limited, are there ways to increase efficiency? An input survey may be used to capture themes in advance of the session. Or the session itself may be designed to focus on collecting everyone's input, with a small group assigned afterward to identify the improvement recommendations. Time constraints should not trump quality problem solving unless there is an equal or better method to complete the needed conversations. The facilitator and the leader(s) should discuss what agenda topics are most important in advance, so adjustments are easier to make in real-time.

5. Identify who should participate and how. Should a cross-section of team members be selected to identify the needed solutions? Is the whole team too large to support a rich dialogue? Might you best involve attendees in smaller discussions by role (e.g., end-users in one session, and development team members in another?) Sometimes important topics aren't relevant for everyone, such as topics that are too technical for some, or issues best discussed without clients present. Is some level of anonymity (perhaps via a pre-session survey) necessary to surface important yet sensitive topics? Will any participants be highly disruptive? If yes, what role should they have and how can you best support their participation?

6. Solicit design services for surveys or interviews. If you use an online survey or conduct individual interviews before the session, request support from a skilled survey and interview designer. Check if your organization has groups with expertise in this area.

7. Convene in a timely fashion. Because it may take a while for the changes made by the project to become visible, the Lessons Learned review often occurs a couple weeks after a go-live or project end. This timing also allows team members time to put the project into perspective. Keep in mind: Waiting too long may cause important topics to be forgotten as people's attention is often overtaken with other priorities, and memories tend to dim quickly for busy people.

8. Customize the review to your needs. At its simplest, a Lessons Learned review requires verbal notice to the team about what you wish to achieve, an email invitation with session logistics including questions you'd like them to come prepared to answer, and a set of slides or other visual aids used to help focus discussion. Check if your organization has standard templates for Lessons Learned sessions. Always customize the templates to your needs. For example, a project review asks "what worked well, what didn't, and what can be done differently" while an organizational review might ask "are we doing the right things", or "considering all our work, when are we most successful?" Determining the right questions to ask for your needs is critical. Think "less is more" when determining the questions you'll ask. For example, the following questions will suffice for a typical review:

1. What best practices did we employ that are critical for us to repeat on future projects?
2. What significant challenges did we face that we should avoid in the future? (Once listed, you might ask the group to prioritize the top 3-5.)
3. What potential solutions might we employ to overcome our prioritized challenges? (Once discussed, you might ask which they will commit to implement.)

9. Hold people accountable to desired behaviors. Norms and ground rules lay out the expected behaviors needed to reach your review goals. Take the time to ensure you have the right behaviors identified going into the session. You can cover them quickly at the beginning of your session but don't skip over them thinking they aren't needed. It's much more difficult to set norms when someone is already acting in a way that's not helpful.

Example ground rules specific to a Lessons Learned session may include:
- Withhold the judgment of success or failure
- Avoid targeting individuals
- Focus on continuous improvement
- Encourage surfacing of important lessons
- Participate equally
- Balance advocacy and inquiry

10. Summarize, publish, and utilize outcomes. When planning your review, think about the most logical next steps, and include in your session slides. Insist that the last 10 or so minutes of your Lessons Learned review be used to evaluate the session itself, validate the next steps, and establish timelines for action. As part of closing, you might ask "Does everyone feel the main concerns have been heard?" and invite anyone with remaining inputs to participate in next steps.

After the review:

Immediately following the Lessons Learned review, create a summary of the major findings and solution recommendations. Commit to take action on what was agreed upon. Those who invested time in the review will want to see tangible results. Where agreements were not reached, consider scheduling a follow on meeting, assigning one or more team members to take further action, or organizing a problem resolution discussion at the management level. Report results to the participants and thank them for their input.

Find multiple mechanisms to make implementation of recommended solutions visible. This may include reviewing the Lessons Learned output before initiating similar future projects, conducting a meta-analysis of several Lessons Learned reviews to identify common themes, or sharing results with your broader business owner audience.

Kathleen Coyle (kcoyle@partners.org), Senior Organizational Development & Training Consultant, Partners HealthCare System, has led numerous Lessons Learned sessions drawing rave reviews from participants. She created these guidelines for managers and team leaders based on her own experiences and best practices.