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# The Modern Data Project Retrospective





# Are your data-driven processes working?

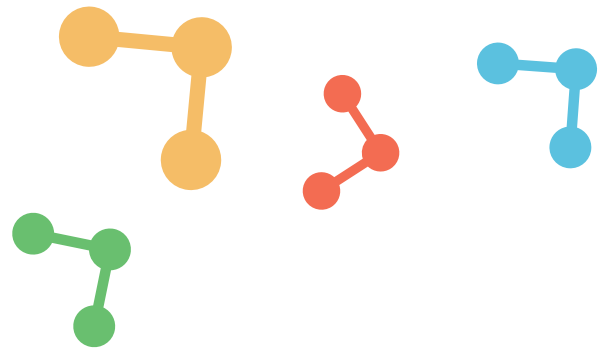
If you're not reviewing and iterating based on how things went, you simply won't know. That's why many companies do retrospectives (also called postmortems): to squeeze more knowledge out of every project and apply lessons learned to the next one.

As part of our toolkit for [Collective Data Empowerment](#), we're sharing the worksheet we use for our own data project retrospectives here at data.world. It'll help guide essential discussions with your team and identify clear ways to improve.

Use this worksheet alongside our [Modern Data Project Checklist](#) or on its own. You can also adjust it to fit your team or adapt to projects.

The worksheet is an editable PDF. Type in text fields and check boxes as you go. You also have plenty of writing room if you prefer to print it out and work with pen and paper. Either way, your team can immediately put the worksheet to use.





# Run better retrospectives.

## MAKE YOUR PEOPLE PART OF THE PROCESS

Project participants should share what they learned with others and listen respectfully to their collaborators. Plus, not all data project retrospectives need to be led by the same person, and he or she certainly doesn't need to be in a leadership position at the company. Instead, nominate someone to be your data practices champion, teach them the steps, and pass the torch.

## DO IT WITHIN A WEEK

Conducting your retrospective soon after completing a project ensures the memories are fresh and participants can immediately apply what they learn. Chances are good you've already got another data project in the works that will benefit from your group's lessons.

## MAKE IT BLAMELESS, LIKE GOOGLE DOES

Google calls them postmortems, but no matter what you call them, they shouldn't be about finger-pointing.

*[Retrospectives] aren't criminal investigations, they're an affirmative process designed to make us all a little smarter.*

*– Ken Norton, Partner at GV*

## SHARE THE RESULTS

Some teams simply add their retrospective notes to the data project itself so context stays close to analysis. However you archive and distribute these lessons learned is up to you, but make sure they're accessible, easy to understand, and actionable.

# PROJECT OVERVIEW

## Did you do what you set out to do?

Review your goals, tactics, and success criteria listed for the project. (Using our [Modern Data Project Checklist](#) makes this step easy.) Don't forget to log whether the project was successful or not!

### INITIAL GOALS

What question were you trying to answer, or what was the initial objective?

### Did these change over time?

Yes    No (If yes, please elaborate.)

### PLANNED TACTICS

How did you go about achieving these goals? (It's ok to be high level with your methods here.)

### Did these change over time?

Yes    No (If yes, please elaborate.)

### SUCCESS CRITERIA

How did you measure success? For example, did you answer the initial question, or possibly a different one? Are people actively using your analysis?

### Did these change over time?

Yes    No (If yes, please elaborate.)



**Hint:** It's very common for one or all of these categories to evolve from the beginning to end of a project. Use the left column to list and discuss what was planned, then evaluate whether things changed and how. Also, don't assume everyone was even on the

same page to begin with: ask everyone if they agree with what's listed, if they want to add anything, or if they had a different understanding of any particular category.

# ACCOMPLISHMENTS

## Here's your chance to brag!

From answering the data question to working seamlessly together across teams, be specific about what went well. You want to document and share what great data work looks like.

### **SUMMARY**

Name the top three project highlights.

1.

2.

3.

### **PROCESS**

What went well, and why?

### **REUSABILITY**

Which outputs are most useful beyond the project? How can your work continue adding value?

Any suggestions on specific ways to reapply your insights?

# IMPROVEMENT AREAS

Now, what went wrong? How can you avoid or address those issues moving forward? Do you know the root causes of any project delays? What are the immediate and long-term effects of these issues? Specificity is important here, too.

## **OPPORTUNITIES TO IMPROVE**

This is another good one for everyone to complete individually. Then, review as a group and identify next steps and task owners together.

## **NEXT STEPS**

Include next steps for each opportunity listed above, or start by using this space to decide how you'll prioritize and address them.

## **TASK OWNERS**

Decide exactly who's responsible to managing each of the actions listed.

# LESSONS LEARNED

## List your key takeaways

Use this section to note any and all insights about your data project processes and the data itself.

Would you recommend any particular teams or contributors to help with similar challenges in the future?

Don't forget to note both the good and the bad, and ask everyone to contribute to this list. Some lessons may not apply to the whole team, and that's ok.



**Hint:** Use these prompts to guide your conversation:

- What processes worked well and should stay the same? What didn't?
- Was the data reliable? Did you discover a great new resource?
- As you went through the project, what did you find surprising?
- Were the right people involved? Is there another team or role that could have improved the project outcome?
- Did you have the right tools for the job? Did you discover a great new trick in any of the tools you use?

# ACTION ITEMS

**Tie off every loose end.**

What items remain from the project? Do they have clear owners assigned to them?

What are your next steps?

<i>TASK</i>	<i>STATUS</i>	<i>PRIORITY</i>	<i>OWNER</i>





# Ready for more Collective Data Empowerment?

This tool is most effective when used in conjunction with other tools, practices, and strategies to make everyone you work with more productive with data. Visit [Distinct Values](#) to get a comprehensive field guide to Collective Data Empowerment.

## About us

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data.world is the smart catalog for data and analysis. It wakes up the hidden data workforce by replacing outdated barriers and disparate silos with deep connections between data, people, and analysis. When every employee can find, understand, and use data, your advanced practitioners can focus on high-impact work, and you can build a data-driven culture, faster. data.world is a Public Benefit Corporation headquartered in Austin, Texas. Visit [data.world](#) for more information and expert guidance.



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