

Hi. Margaret Maloney, and together we're going to talk about how to conduct a Lessons Learned session. Because we all know it's a best practice to capture Lessons Learned, and to make use of those lessons as we move forward. We certainly do not want to repeat the same mistakes over and over again. And when something works really well, we do want to do that again.

- 0:21 And we want other project teams to avoid repeating mistakes and to leverage approaches that worked well and of course we want them to share their Lessons Learned to.
- 0:31 I want to share with you a simple approach.
- 0:34 I learned it from a group of consultants who came on-sight when I worked for a company where project managing was new.
- 0:41 And I have been using this approach ever since. Because it's just simple and efficient. Of course we start by inviting people to a Lessons Learned meeting. And we let them know that the purpose of the meeting is to come up with some things that we should do again and some things that maybe we do differently. So we let people know ahead of time. If for some reason you think someone would be uncomfortable. With you as the project manager facilitating the meeting,
- 1:07 then have someone else facilitate it. I haven't had that happen yet. [LAUGH] But it's just something I wanna put out there for you. Okay, if this is an in-person meeting, then have a white board or easels with paper to write on.
- 1:23 And if you are doing this online in a virtual meeting, then have some kind of, I'll say, white boarding tool. All right?
- 1:31 Now what you're going to do. So you've got everyone assembled. And you've got your white board and easels and pens. Or your virtual white boarding and the ability to write on it. You're gonna start by asking people, what is something you think we could have done differently? Now, the first time I did this on my own, I was worried about this. And I was worried about starting with, what should we do better, what should we do differently, cuz when we say do differently, what we're saying nicely, instead of saying what went wrong which puts everyone on the defensive, we say what could we do differently?
- 2:05 I was afraid to start with this cause I thought well maybe people would think don't start off, this is too negative and the team just stepped in and they said no let's go with that, let's start with what we could do differently and let's finish on the positives. And I've done it that way ever since my team taught me that that's what they wanted. All right? Okay. So, you do want to have some ground rules. For example, we don't name names. We don't make the lessons personal. If, for example, there was a challenge let's say because I took time off during the project. And we don't say, Margaret shouldn't have been allowed to take time off, or Margaret shouldn't use vacation time during the project. But what we might say is, we need a better understanding of allowable time off during peak project performance times. Or we might say something like, we need to have better cross-training so that when people do use their allocated time, it doesn't delay the project. That's how we want to state something like that. Then what you can do is, you go around the room. I think of it as going around the table if you've got people in person, maybe sitting at a conference room with you. Or if it's a virtual meeting, people are virtually sitting around.
- 3:20 You ask everybody to contribute. Everyone also has the opportunity to say pass, all right? I had one team member who, super wonderful person to work with. I don't know what happened to him but I believe through the course of his career he became hesitant to express any opinions out loud in public, that's very unfortunate. But he would, he would never let it be said that he didn't show up where he was supposed to be so he was there at the meetings. But he wouldn't say anything. So he would always pass, that's okay.
- 3:52 Sometimes people pass because when you have a good sized group the idea you wanted to share was already said by somebody sitting two people away from you, okay?
- 4:04 Typically about three passes around the room or around the group is enough.
- 4:10 Because after we go around three times, most people are saying pass because the ideas have gotten out there. If after the third time if there are people who still have new information to contribute.

- 4:23 Well then, we're going to let them. So use that three as a guideline.
- 4:28 So now, you've gone around the room, people have shared what we could do differently. And by the way, while they're sharing this, you're recording this information. As in writing it, I don't mean like filming or audio, I mean writing it down. So it's on the white board, virtual or otherwise.
- 4:43 But here's what you're not doing. You're not keeping track of who said what. You don't write down, Margaret said this. People may or may not remember, but we don't want to attach names to any of the ideas because people will lose their anonymity and they may not feel comfortable sharing in future Lessons Learned sessions, right.
- 5:03 Okay, so you've got this big list of ideas and you've got this group of people. Now everyone gets three votes, three votes to spend, and what we ask people to do is to take some time and look at all the ideas.
- 5:19 And then place their votes on the ideas they think are the most significant.
- 5:26 They can spend their votes any way they want. They can put three votes on one item if they think that's really important. They can put one vote on three items. It's up to them. It's up to them. And then what you wind up with is you usually wind up with a clear picture of what are the three ideas, the three things we think we should do differently next time. Now, once you've completed that, guess what? Go ahead and use the same approach with what went well. What would we do the same next time? What do we want to make sure we recreate? And so we use the same approach, going around the room, people expressing ideas, allowing people to say pass if they need to, making sure the ideas are jotted down. No names attached to the ideas, allowing people to have their three votes to spend, and then there you go. And now the meeting's over, what do you do?
- 6:19 Gather up the information, you're gonna put it in a document,
- 6:24 unless you have a Lessons Learned database, which would be wonderful. So gather it up, explain the process, so you can write like a very brief document with a brief introduction, these are the Lessons Learned sessions that's gathered from Project X.
- 6:39 Discuss the process, here's the approach we used, what we did, how we did it.
- 6:44 Here are the top three for each area, things we would do differently, things we would do the same. And in the document, I think it's a good idea to list what we would do differently first and then what we would do the same second. Leave them on the high note.
- 6:58 And consider something I like to do is in the appendix of the document. I like to include all of the items so if somebody says that's great, these are the top three. I want to know everything that was said. Good please go to Appendix A. And that is how we can do it. And then, publish it and make sure it gets out there. Of course my wish for you is that you are someplace where we can publish this kind of information. Simple, easy, off you go, gathering Lessons Learned. Thanks, and bye for now.