

Post-Incident Retrospective (PIR)

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Retrospective Meeting Process

By blending the structure of postmortems with the collaborative elements of retrospectives, we can create a more engaging and effective process for learning from incidents and improving team performance.

A retrospective is meant to create a safe space for team members to share their honest feedback about what’s going well for the team and what could be improved. Retrospectives generate discussions around how to improve team collaboration, with actionable items that are documented and can be followed up on in the future.

Why have retrospectives?

- Retrospectives help a team establish a practice of continuous improvement of their interactions and processes. This is achieved through reflecting on “how” a team delivers versus “what” the team delivers.”
- Retrospectives create transparency and trust. They compel a team to discuss both problems and success stories. Being honest and transparent about the good, the bad, the ugly, and everything in between builds trust among team members.
- Retrospectives empower team members. Team members define and own their actionable items and changes. Since team members are empowered to act on collective decisions, there will be little resistance to follow through on these changes. Thus, this gives power back to the team.

1. Preparation

Schedule the Meeting

- Set a date and time soon after the weekly incident review meeting.
- Schedule the meeting for 45 minutes.
- Incident must meet the following criteria:
  - Severity 1
  - Incident occurred 2 times within 30 days
  - Identified during incident review
- Ensure all relevant stakeholders are available:
  - Incident Owner/Commander (Technical Owner)
  - TPM(s)
  - Product Owner(s)
  - Director of the Department (Manager of the Team Manager)
  - Manager of the Team(s)
  - All Engineers of the Team(s)

Create the ADO Retrospective Board

- Set up a retrospective board in Azure DevOps (ADO).
- Ensure the board is under the ADO project for the primary team assigned to the incident.
- If multiple teams are involved, designate one team as the primary.

Gather Materials

- Bring all relevant data from the postmortem incident review.
- Prepare a summary of the postmortem findings to share during the meeting.

2. Conducting the Retrospective Meeting

Introduction

- Welcome attendees and outline the purpose of the meeting.
- Explain the goals of the session: to understand what happened, why it happened, and how to prevent it in the future.
- Emphasize a blameless approach to ensure open and honest discussion.
- Briefly summarize the incident and key findings from the weekly incident review meeting.

Review the Incident Timeline

- Work together to review and ensure a detailed timeline of events leading up to, during, and after the incident.
- Identify key moments, decisions, and actions.

Reflect on What Went Well

- Ask participants to share positive aspects of the incident response.
  - Examples: Effective communication, quick resolution, teamwork.
- Use the ADO retrospective board to document all positive points.

Identify Areas for Improvement

- Discuss what could have been done better.
  - Examples: Delays in detection, unclear responsibilities, insufficient monitoring.
- Encourage open and honest feedback.
- Document all points for improvement on the ADO retrospective board.

Brainstorm Solutions

- For each identified area of improvement, brainstorm potential solutions.
- Assign action items to specific team members.
- Set deadlines for implementing these solutions.
- Ensure all action items are documented on the ADO retrospective board.

Action Plan Review

- Based on the discussion, create a list of actionable items to address the identified issues.
- Assign ownership and set deadlines for these actions.
- Ensure that action items are specific, measurable, achievable, relevant, and time-bound (SMART).
- Assign a TPM to track the progress of all action items.

Review and Document

- Summarize the findings and action items.

- Document the postmortem report, including the timeline, discussion points, root cause analysis, and action plan.
- Share the report with the team and relevant stakeholders.

3. Follow-up

Monitor Progress

- The TPM should regularly check in on the progress of the action items.
- Update the ADO retrospective board with the status of each action item.

Regular Updates

- Provide regular updates to stakeholders on the progress of the action items.
- Include updates in team meetings or via email.

Continuous Improvement

- Incorporate feedback from the retrospective into the incident management process.
- Encourage a culture of continuous learning and improvement within the team.
- Ensure that improvements are implemented and monitor their effectiveness.

Retrospective Meeting Agenda Template

Introduction (5 minutes)

- Welcome and purpose
- Incident summary and key findings

Review the Incident Timeline (10 minutes)

- Review the timeline of events for the incident.

Reflect on What Went Well (10 minutes)

- Positive aspects of the incident response
- Document positive points

Identify Areas for Improvement (10 minutes)

- Discuss areas needing improvement
- Document improvement points

Brainstorm Solutions (10 minutes)

- Solutions for each improvement area
- Assign action items and set deadlines

Action Plan Review (10 minutes)

- Review and confirm action items
- Assign TPM for follow-up

Final Review and Documentation (5 minutes)

- Summarize the findings and action items.
- Finalize the postmortem report

Example Retrospective Meeting Mockup

Website Outage Due to Marketing Email

Date: 2024-07-14  
Time: 11:00 AM  
Duration: 30 minutes  
Platform: ADO Retrospective Board under Team Alpha project

Attendees:

- **Incident Owner/Commander:** Jane Doe
- **TPM(s):** John Smith
- **Product Owner(s):** Alice Johnson
- **Director of the Department:** Mary Brown
- **Manager of the Team(s):** Bob White
- **All Engineers of the Team(s):** Team Alpha

Agenda

Introduction (5 minutes)

- **Welcome and Purpose:**
  - Jane Doe: "Welcome everyone. The purpose of this retrospective is to discuss what we learned from the recent website outage incident caused by the marketing email campaign. Our goal is to identify what went well, what didn't, and how we can improve our processes to prevent similar incidents in the future."
- **Incident Summary and Key Findings:**
  - Jane Doe: "To briefly summarize, our website experienced a two-hour outage on July 8th due to an unexpected surge in traffic following a marketing email sent to 1 million subscribers. The root cause was insufficient scaling of our web servers. Let's dive into the details."

Reflect on What Went Well (10 minutes)

- **Discussion:**
  - Jane Doe: "Let's start by discussing what went well during the incident response."
  - Team Members:
    - "Our alerting system worked as expected and notified us quickly."
    - "The communication between the SRE team and the support team was efficient."
    - "We were able to temporarily increase server capacity and restore service within 2 hours."
- **Documentation on ADO Retrospective Board:**
  - Alerts were timely and effective.
  - Strong communication between SRE and support teams.
  - Quick resolution through temporary server capacity increase.

Identify Areas for Improvement (10 minutes)

- **Discussion:**
  - Jane Doe: "Now, let's discuss what could have been done better."
  - Team Members:
    - "There was no prior communication from the marketing team about the email campaign."
    - "Our servers were not prepared for the sudden spike in traffic."
    - "We lacked automated scaling policies."
- **Documentation on ADO Retrospective Board:**
  - Lack of communication from the marketing team.
  - Servers not scaled for high traffic.
  - No automated scaling policies in place.

Brainstorm Solutions (10 minutes)

- **Discussion:**
  - Jane Doe: "For each identified issue, let's brainstorm potential solutions."
  - Team Members:
    - "Implement a communication protocol between the marketing and IT teams."
    - "Conduct load testing before future marketing campaigns."
    - "Set up automated scaling policies for our web servers."
- **Action Items:**
  - **Implement Communication Protocol:** Assigned to Alice Johnson, Due: 2024-07-30
  - **Conduct Load Testing:** Assigned to Bob White, Due: 2024-07-25
  - **Set Up Automated Scaling Policies:** Assigned to Jane Doe, Due: 2024-07-20

Action Plan Review (5 minutes)

- **Review and Confirmation:**
  - John Smith: "Let's review and confirm the action items."

- Action Items:
  - Implement Communication Protocol (Alice Johnson, Due: 2024-07-30)
  - Conduct Load Testing (Bob White, Due: 2024-07-25)
  - Set Up Automated Scaling Policies (Jane Doe, Due: 2024-07-20)
- John Smith: "I will follow up on the progress of these action items and update the ADO board accordingly."

Conclusion

- **Jane Doe:** "Thank you everyone for your valuable input. Let's work on these action items to improve our processes and prevent future incidents. Our next retrospective will include a review of the progress on these items."