

## Lessons Learned and Innovation Capture

Richard Hemsworth (Project Coach and EPMO Director)

Capturing lessons learned is an integral part of every project and serves several purposes. While the finalisation of a formal lessons learned document is completed during the project closeout process (sometimes called post-implementation review), capturing lessons learned should occur throughout the project lifecycle to ensure all information is documented in a timely and accurate manner. The lessons learned document serves as a valuable tool for use by other project managers within an organisation who are assigned similar projects.

The lessons learned register should not only describe what went wrong during a project and suggestions to avoid similar occurrences in the future, but it should also describe what went well and how similar projects may benefit from these successes. The register should be communicated to the project sponsor and Project Management Office (PMO) for inclusion in the organisational assets and archives as part of the lessons learned database. Where the issue addresses a risk, it should also be listed in the risk library and costs placed in the estimating tool.

If the organisation does not have a PMO, then other formal means of communicating the lessons learned should be utilised to ensure all project managers are included. Many organisations use an internet / cloud-based tool to distribute this information.

### An Approach

1. Gather the key stakeholders by issuing an agenda for a post-implementation review meeting.
2. The agenda should come with the project benefits specification (written at the start of the project, probably as part of the business case).
3. The section on deliverables should answer the questions:
  - a. What went right?
  - b. What went wrong?
  - c. What could have been better?
  - d. Was the project delivered within scope?
  - e. Were the Success Criteria as described in the Business Case achieved?
  - f. Are the deliverables fit for purpose and functioning well?
  - g. Have the users received training and support?
  - h. How does the end result compare with the original project plan, in terms of quality, schedule and budget?
  - i. What were the variations?
4. The section of quality and acceptance should answer the questions:
  - a. Have you met the needs of your key stakeholders/end users?
  - b. If they are not satisfied, how will this be addressed?
5. The lessons learned section should address questions like:
  - a. What worked well for the project or project team?
  - b. What didn't work well for this project or for the project team?
  - c. What should be done over or differently?

- d. What surprises did the team handle during the project?
- e. What project events were not anticipated?
- f. How did you communicate about your project with your customers, project team, and management? What worked well and what would you do differently next time?
- g. What changes to scope, to costs, to resources, and/or to the schedule occurred during the project? What did you learn from this?
- h. How were project resources estimated, as well as the project schedule? How were these documented and communicated to the project stakeholders?
- i. Were the project goals attained? If not, what changes would help to meet future goals?
- j. Did you speak with anyone else about the project or use lessons learned to get information about similar project efforts, similar user groups, etc.? If so, was it beneficial?
- k. What lessons have you learned that need to be carried forward to future projects?
- l. How were project risks identified, communicated, and resolved?
- m. How well were the projects deliverables assessed?
- n. How well were timescales and costs assessed?
- o. What went wrong, why did these things go wrong, and how could these problems be avoided next time? If there are problems here, how will these be addressed?
- p. Do you have comments on any of the following items that were used on your project: checklists, vendor issues, new skills acquired, security issues, etc.?
- q. Are there things about the technology, the organization (how we work), the project, etc. that others might benefit from knowing?
- r. Was the Project Management methodology useful?
- s. Was the project reporting adequate – did all stakeholders get a targeted communication suited to their needs (progress, issues, risks, changes, etc.)?
- t. Were the templates and other guidance available from the EPMO helpful?

A simple template can capture the recommendations, including:

- Recommendation
- Action
- Owner
- Date

or you may choose to use a more comprehensive capture tool like the one discussed below.

Capturing the data is primarily the project manager’s responsibility, but everybody on the project should be aware that they can provide ideas and insight into the lessons learned. This needs to be a collaborative effort in order to succeed. Recording lessons learned should be a regular part of project governance and needs to be included in the weekly and monthly processes.

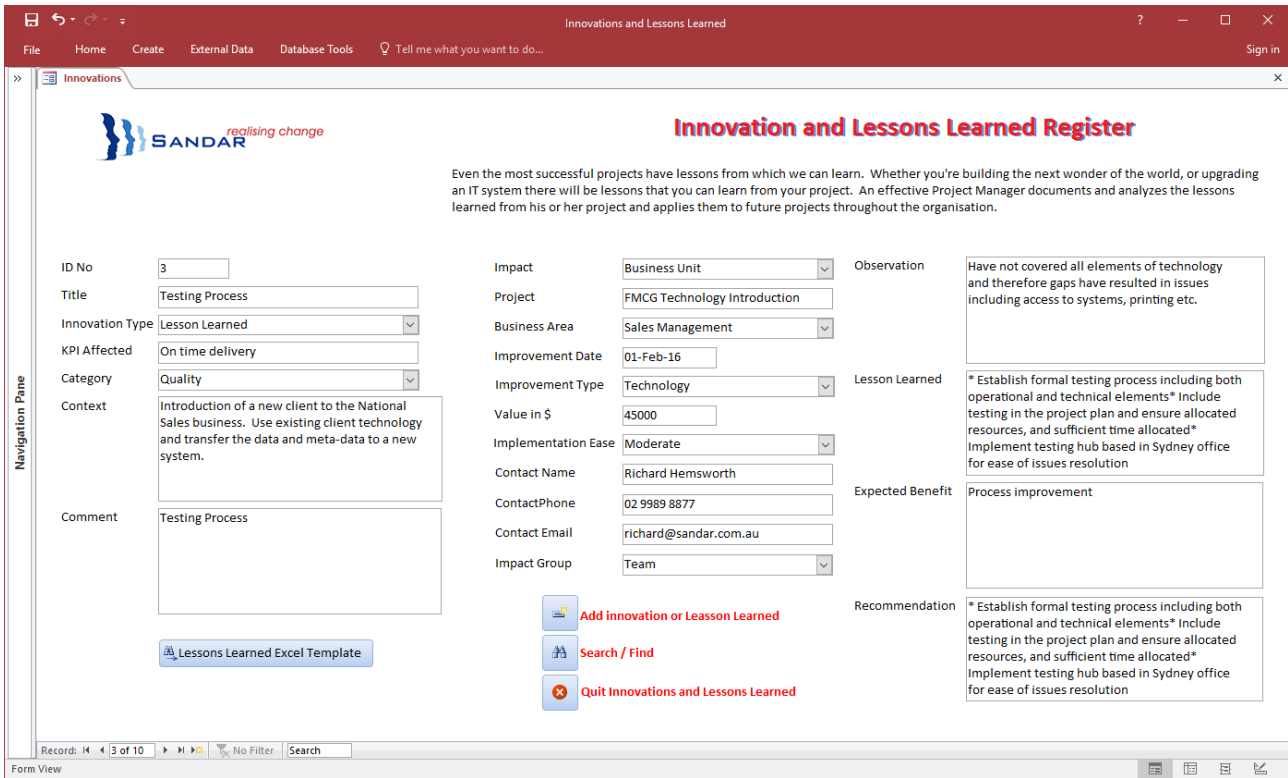
### Field Descriptions

Parameter /Field Name	Parameter Type	Description
ID	Text	Unique identifier
Title	Text	Brief name of the lesson learned

Parameter /Field Name	Parameter Type	Description
Observation	Text	Description of what happened in the project that resulted in this lesson/innovation
Category	Pull-down menu - Text	One of the 10 PMBoK knowledge areas eg scope, time, quality, risk, integration, communication, procurement, etc
KPI Affected	Text	List of KPIs affected
Context	Text	Description of where this innovation is relevant
Lesson Learned	Text	Details of lesson learned or innovation
Recommendation	Text	Free form text detailing recommended implementation approach
Expected Benefit	Text	Free form text detailing expected benefits
Comment	Text	Free form text to comment on innovation
Project	Pull-down menu - Text	Name of the projects from Projects table managed by EPMO
Improvement Date	Medium Date	eg 13 Apr 16
Value In \$	Number	eg 45,000
Contact Name	Text	Contact's name
Contact Phone	Text	Contact's phone number
Contact Email	Text	Innovation email contact
Business Area	Pull-down menu - Text	Listed by name of actual business area
Impact	Text	Local Widespread Global / Systemic
Impact Group	Pull-down menu - Text	Individual Team Business Unit Enterprise
Improvement Type	Pull-down menu - Text	Technology Financial Contract Personnel System / Process Reward / Motivation
Implementation Ease	Pull-down menu - Text	Easy Moderate Difficult
Innovation Type	Pull-down menu - Text	Lesson learned Innovation Suggestion Improvement

If you would like to create your own Innovations Register in SharePoint or some other cloud based tool, the basis of your register is in the fields above. If you would prefer a copy of Sandar's

Microsoft Access Innovation and Lessons Learned Register, it is available from the 'Reflect' page of the P.O.D.S. change leadership tool. A screenshot sample is included here:



**Innovation and Lessons Learned Register**

Even the most successful projects have lessons from which we can learn. Whether you're building the next wonder of the world, or upgrading an IT system there will be lessons that you can learn from your project. An effective Project Manager documents and analyzes the lessons learned from his or her project and applies them to future projects throughout the organisation.

**ID No**: 3

**Title**: Testing Process

**Innovation Type**: Lesson Learned

**KPI Affected**: On time delivery

**Category**: Quality

**Context**: Introduction of a new client to the National Sales business. Use existing client technology and transfer the data and meta-data to a new system.

**Comment**: Testing Process

**Impact**: Business Unit

**Project**: FMCG Technology Introduction

**Business Area**: Sales Management

**Improvement Date**: 01-Feb-16

**Improvement Type**: Technology

**Value in \$**: 45000

**Implementation Ease**: Moderate

**Contact Name**: Richard Hemsworth

**Contact Phone**: 02 9989 8877

**Contact Email**: richard@sandar.com.au

**Impact Group**: Team

**Observation**: Have not covered all elements of technology and therefore gaps have resulted in issues including access to systems, printing etc.

**Lesson Learned**: \* Establish formal testing process including both operational and technical elements\* Include testing in the project plan and ensure allocated resources, and sufficient time allocated\* Implement testing hub based in Sydney office for ease of issues resolution

**Expected Benefit**: Process improvement

**Recommendation**: \* Establish formal testing process including both operational and technical elements\* Include testing in the project plan and ensure allocated resources, and sufficient time allocated\* Implement testing hub based in Sydney office for ease of issues resolution

Buttons: Add innovation or Lesson Learned, Search / Find, Quit Innovations and Lessons Learned

Footer: Record: 14 of 10, No Filter, Search

## Useful References

Project Management Institute (2013). A Guide to the Project Management Body of Knowledge (PMBok Guide) 5th Edition, PMI.

Office of Government Commerce (2009). Managing Successful Projects with PRINCE2, Stationery Office Books, Axelos, Norwich, United Kingdom.