

How to Conduct a Lessons Learned Review



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HOW TO CONDUCT A LESSONS-LEARNED REVIEW

The primary purpose of a lessons learned review is to assess the overall success of a project and to learn from your mistakes. Often it is best to conduct a survey before holding the lessons-learned meeting.



Survey. A lessons-learned survey, as shown below,¹ can be sent to team members during or after a project, to solicit their feedback on how the project was conducted. It applies to any project; and questions can easily be added to focus on additional areas for your project.

Purpose. The purpose of the survey is to capture lessons learned from the project while they're fresh in people's mind. The results can be summarized and recommendations passed on to future teams.

How. Send a survey through email or on paper to members of the project team. Let them know that results can be kept anonymous (to encourage people to be frank in their assessments). Send out this survey before any group "lessons learned" meetings. The feedback you receive from the survey can help point to particular areas that should get special exploration in the group lessons learned meeting.

What. The survey can address any pertinent items including the effectiveness of project communications, an evaluation of project processes such as problem solving, change control management, decision making, project tracking, stakeholder management, customer satisfaction, etc.

GENERAL PROJECT ISSUES AND COMMUNICATION

The questions are geared to your particular project but wherever appropriate you can comment about release-level issues too.

Note: add any particular comments you wish....

¹ Adapted from ProjectConnections.com [www.ProjectConnections.com].

1. How clearly defined were the objectives for this project?

Very somewhat not very not at all

2. How clearly defined were the objectives for your work?

Very somewhat not very not at all

3. How clear were you on your role in the project?

Very somewhat not very not at all

4. How adequately involved did you feel in project decisions?

Very somewhat not very not at all

If not, what decisions did you feel left out of?

5. How efficient and effective were project team meetings?

Very somewhat not very not at all

What would you change?

6. How efficient and effective were technical meetings?

Very somewhat not very not at all

What would you change?

7. How well do you feel the executives support this project?

Very somewhat not very not at all

8. How adequate has cross-functional participation been?

Very somewhat not very not at all

What were the problems encountered in the project-functional area relationship, why, and how could they be fixed? What cross-functional participation, if any, was lacking?

9. Do you feel appreciated, recognized and rewarded for your efforts?

Very somewhat not very not at all

What if anything has been lacking?

10. To what degree do you feel the entire team was committed to the project schedule?

Very somewhat not very not at all

What if any issues are there?

12. To what degree have any "people issues" gotten in the way?

___Very ___somewhat ___not very ___not at all

What issues?

13. What communication, organization, structural problems in general were encountered, and how could we have done better in these areas?

SCHEDULE ESTIMATION ISSUES

NOTE: The survey isn't intended to collect exhaustive data on everything right now. We might decide after the post-mortem to go work with a sub-group to investigate certain estimation issues, for instance to help us next time out. The survey just helps us ferret out the rough scope of any issues.

Your take on the next few questions will help.

Which of the following estimation issues did you personally have and what was its impact?

I was diverted to work on another project full-time.

Project: Amount of time diverted for: _____

Impact on your project work: _____

I overestimated the amount of time I would have each week to work on this project.

The other work that interfered was _____

The amount of time per week it took up was _____

Impact: calendar schedule slip of ___days ___weeks ___ months

My initial schedule did not include some pieces of technical design or coding work that I subsequently realized I had to do.

Describe briefly _____

Impact: additional hours of work: _____

My initial schedule did not take into account certain project "other" work such as attending other people's design reviews, doing two rounds of my own design reviews, etc.

Describe: _____

Impact: calendar slip to my work of ___ days ___ weeks ___ month _____

My estimates for particular tasks were not accurate.

Describe: type of task, how "off" the estimate was (days, weeks) _____

Why was it difficult to estimate? _____

What would help get better estimates next time? _____

I unexpectedly had to re-do some work.

Describe: (Did something in the system design change that forced you to redesign? Was there a spec misunderstanding? etc.) _____

Impact on your schedule: _____

What could have helped prevent the problem? _____

Knowing what you know now, how would you do the scheduling/estimating process differently next time to avoid any problems noted above?

DESIGN, IMPLEMENTATION, TEST PROCESSES

1. How effective was our architecture/system design process in phase 2 and 3?

__Very __somewhat __not very __not at all

Comments: _____

2. How effective were our functional specs?

__very __somewhat __not very __not at all

Comments: _____

3. How effective were our design (or implementation) specs?

__Very __somewhat __not very __not at all

Comments: _____

4. How effective were our design reviews?

Very somewhat not very not at all

Comments: _____

5. How effective were our code reviews or hardware reviews?

Very somewhat not very not at all

Comments: _____

6. How well were interfaces defined?

Very somewhat not very not at all

Comments: _____

7. How well were design and interface decisions documented?

Very somewhat not very not at all

Comments: _____

8. How effective has interaction/cooperation between technical "Sub-teams" been?

Very somewhat not very not at all

Comments: _____

9. How useful was your unit testing?

very somewhat not very not at all

Comments: _____

Did you take unit testing into account in your schedule? _____

10. How smooth do you feel Integration has been?

very somewhat not very not at all

Comments (why or why not?): _____

11. How comprehensive was integration testing, especially to allow SQA testing to get off to a good start?

very somewhat not very not at all

Comments: _____

12. How well is the build process working?

very somewhat not very not at all

Comments: _____

13. To what degree did you have the tools you needed for testing?

very somewhat not very not at all

Comments: _____

PERCEIVED PROCESS ISSUES

1. Is there any way in which you think our development process hampered this project? If so, how?

2. What would you change about our development process?

3. What would you like to better understand or see better documented about how to use our process on this type of project?

CLOSING

1. What were up to 5 main causes for schedule slips, and how could we avoid those causes in the future?

2. Was the project significantly delayed/ hampered by outside dependencies (outside to the project that is)? Which ones? How to solve?

3. What were the main bottlenecks on the process?

4. What were the main sources of frustration in the project?

5. If we had to do over what is the one thing that you would change (related to process, not to technical solution)?

6. For the next project, how/ what could we improve on the way project was conducted?

7. Feel free to add any other comments here: