

# 690. WRAP-UP: DETERMINING LESSONS LEARNED

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## Goals

- To identify lessons learned from a specific completed project or from a discrete phase of a large, complex project.
  - To develop an action plan to put learnings into practice.
  - To provide a model for participants to learn how to use their experience to improve future work.
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## *Group Size*

At least four and up to thirty participants who are working on the same long-term project.

## *Time Required*

One-and-one-half to three hours, depending on the number of participants reporting back.

## *Materials*

- One flip-chart with extra paper.
- Felt-tipped markers.
- 3" x 5" Post-it® Notes, one pad per participant.
- Masking tape.

## *Physical Setting*

A large room with round tables at which groups can work without disturbing one another. Ample wall space is needed for displaying flip-chart sheets.

## Process

1. As a wrap-up to a completed project or a particular phase of a project, bring participants together at a meeting and ask: "What's the most pleasant/worthwhile event that happened during the project?" Record their answers on a flip-chart. (Ten minutes.)
2. Have participants brainstorm the major components of the project thus far (for example, interaction, teamwork, work processes, etc.) and post those major headings on the wall, each on its own large piece of flip-chart paper. Have individuals decide on at least six components. (Fifteen minutes.)
3. Ask participants to think of various experiences that (a) went well and (b) didn't go well during the project. For each experience, have participants identify the lesson learned from that experience and write it on a Post-it® Note using a fine-point marker.
  - *Example:* "We had pizza together one day a week and as we got together issues emerged. We learned that we needed to get together informally."
  - *Example:* "A lot of team members traveled home for the weekends; they spent most of Monday asking questions. We learned we needed to spend thirty minutes each Monday doing catch-up in a scheduled meeting."Remind people to write legibly. (Ten minutes.)
4. Have participants post their lessons learned on the appropriate flip-chart sheet on the wall. Have participants roam around the room and read all the notes, silently, before moving on to the next step. (Five to ten minutes.)
5. Divide participants into random small groups of four to six members each. Assign each group to one of the categories on the wall. Depending on the numbers of topics and people, some groups may have to be responsible for more than one subject. Have each group summarize the comments that have been posted and prepare to report back to the large group. (Note: Consider having each group prioritize the lessons learned and report on the top three or four, again depending on the amount of data collected.) (Fifteen to twenty-five minutes.)
6. As groups read back the summary of comments, elicit the positive results of the lesson, as well as the negative consequences of not acting on the lesson learned. (Ten to twenty minutes.)
7. Have the total group identify the most important themes and messages they heard from the small-group reports. Record these on the flip-chart. (Ten to twenty minutes.)

8. Develop an action list of next steps based on the previous discussion, with the focus on how to retain, access, and use the most important lessons surfaced by the groups. Assign responsibilities and time lines for each action item. (Fifteen to twenty-five minutes.)
9. If necessary, check and affirm that there is formal authority from management to enact the recommended action items. Senior management may want time to deliberate and offer the following choices: act now, act later (when?), defer or modify (explain logic, provide feedback), reject (explain logic, provide feedback).
10. Schedule a follow-up meeting to revisit the action plan and check on implementation and progress.
11. Summarize by asking:
  - How can lessons learned be a tool for progress?
  - How can you continue to benefit from what you learned today?
  - Can you think of a way to archive the lessons learned?
  - How will you review progress on the action items?
  - What will this team do differently to improve future work?(Twenty minutes.)

### ***Variation***

- Create specific major headings for lessons learned, which could be done after individuals have posted lessons and rearranged them into clusters of "similar" items. Then ask participants to come up with a descriptive label or title for each cluster.

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