Capturing Lessons Learned Information – Making your current and future projects Smarter!


Presented by Bill Dow, PMP

Bill Dow, PMP

- **26 years in information technology**
- **24 in Project Management**
- **9+ years at Microsoft, 11 running large PMOs**
- **Instructor of Project Management, currently teaching at Bellevue College, and has taught in other Colleges in British Columbia & Ontario, Canada**
- **Strong passion for Project Management, PMO's & Project Management Methodologies.**
- **Author of three Project Management books and articles.**

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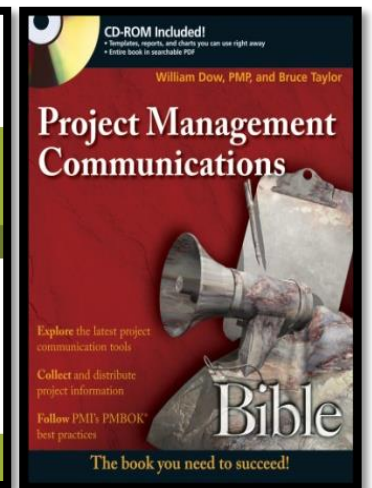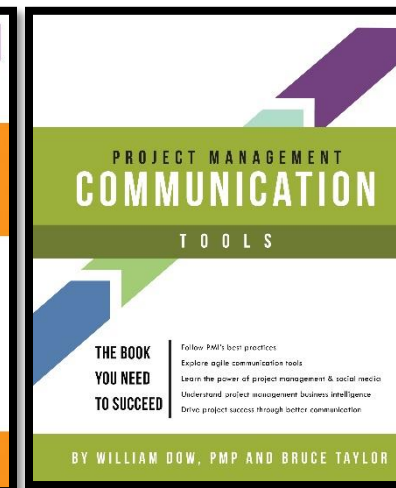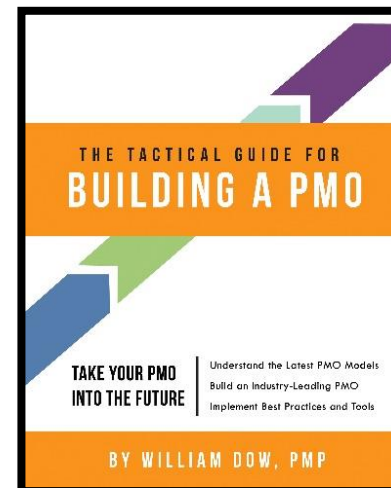
Agenda

1. Collect Lessons Learned at Project Kick-off

2. Collect Lessons Learned throughout life of project

3. Review Past Project Information

4. Show discretion in what you are capturing

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▸ **Today's project manager's do not track Lesson's learned information for their project's.**

▸ We can show PM's survey after survey on project failures and that does not matter. Project Manager's don't see value, so they won't do it.

▸ It may be a bold statement, but sadly it is true!

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- So what are we going to do about it?

- Who's problem is it anyway? Is it the Project Manager's problem? Is it the PMO Manager's problem? What about the functional manager's?

- **I am here today to tell you that it the project manager's problem.**

Think about it!!!!

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‣ Who is the first person the customer turns to when a project has a problem?

The Project Manager!!!

It happens every time!

▸ So, if it is the project manager's problem, then I think it is safe to say the project managers must do whatever he or she can to fix that problem.

Would you agree?

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BEST PRACTICE

Capturing & Using Lesson's Learned Information on your projects.

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▸ *Best Practice # 1 – Collect Lessons Learned information from the project kick-off!*

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▸ From the project kick-off meeting, review lessons learned information from past projects.

▸ Spend some time, may a couple slides going over lessons learned information from past but similar projects.

▸ The caveat to those discussions – It shouldn't take to long, and make the conversations meaningful. Not a check box activity.

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▸ What do I mean by that?

▸ Look at some of the challenges the projects had communicating information, running the project, dealing with stakeholders…etc.

▸ One of the areas important to cover is looking at how past projects communicated project information. Where did they struggle, what went well?

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▸ Knowing this information from the project kick-off, would help the project team be better prepared.

▸ For example, on one large project, I had a customer that wanted a status report every Thursday, but I had to give that status report in person.

▸ Another example, I had a customer that wanted a .mpp (Microsoft Project) file sent to them EOD Friday's.

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▸ Sharing past projects experiences will only help set expectations from the very beginning and help everyone be project successful.

▸ Spend the time, go over lessons learned information from past projects and give you and your project team the best chance of landing a successful project.

▸ Failing to review past project information, could have you making the same mistakes.

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▸ *Best Practice # 2 – Collecting Lessons Learned information throughout the life of your project!*

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▸ Starting from the first project status meeting and continue that process for every meeting going forward.

▸ Collecting Lesson's Learned information from the beginning allows you to make course correction along the way.

▸ Many project manager's miss this – They lose the ability to see patterns and change things up. *Bob always late on his deliverables….etc.*

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▸ How do you do that? How do you collect Lessons Learned along the life of your project.

▸ Easy really, you start from the first status meeting and you ask your team "**What is going well?**" & "**Where are we struggling?**"….

▸ Those words don't have to be exact, but the one thing you don't do…..

Don't tell your team you are collecting Lessons Learned Information! – Just do it!

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- If you say the word "Lessons Learned", it will quickly throw the team off and they quickly devalue what you are doing.

- So, you have to be a bit tricky here, and you have to **"collect"** the lessons Learned information, without them knowing it.

- It is actually pretty easy…

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Agenda Item	Description	Owner / Responsible
1	Review Last week's Minutes	Project Manager
2	Review Current Action items	All Team
3	Review Project Schedule	All Team
4	Major Area Updates	All Team Leads
5	Review Current Budget information	Project Manager
6	Project Risks	All Team
7	Project Issues	All Team
8	Lessons Learned Information	All Team
9	Walk-ons	All Team

"What is going well?" & "Where are we struggling?" "How are things going?...etc."

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▸ Incorporating your lessons learned information directly into your weekly status agenda, will help you tremendously in driving your project.

▸ Especially, if you need to do any course corrections, any adjustments of staff, process changes.

▸ Just remember, don't call it "lesson's learned", capture it more discreetly, and you have a much easier time.

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▸ *Best Practice # 3 – Review Past Project Lessons learned information.*

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▸ One of the biggest mistakes project managers can do is not continuing to learn their craft.

▸ Once project manger's give up and stops wanting to learn and get better, the project's tend to suffer.

▸ One of the ways to continue to learn is to review past project information and determine if what was done before can be done on your project.

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▸ How do you do that?

▸ Start reviewing lessons learned information from past projects or other projects in your organization and take some of the key learnings from those projects and apply to your project.

▸ Focus your research on some of the Nitty-Gritty information.

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- **Nitty-Gritty information includes:**

- Project Budget information. How was budget managed, what reports were built, what dashboards? How was it tracked?

- Project Schedules? What reports? Did customers want to see the timeline or did they like the Gantt chart?

- Project Resources… What resource reports did the stakeholders what to see?

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▸ Some companies have centralized databases, or standard SharePoint sites where lessons learned data is stored for you to review.

▸ It seems like today, those repositories are harder and harder to find, but when you do find them, the wealth of data you find is priceless.

▸ Spend the time and find those repositories and review past information where you can.

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- *Best Practice # 4 – Show discretion in capturing Lessons Learned information!*

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▸ Collecting lessons learned information throughout the life of the project requires discretion. This is not information that in most cases can be shared. **It is just for you!**

▸ Project Managers are going to have to be discreet in what information can and can not be shared.

▸ Sharing information that should not be shared, can quickly turn into the team members not trusting you. *That's the worst place you can be in!*

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▸ Collect your lesson's learned information offline in a folder or a document that is not sharable.

▸ Offline hard drives, secured folders on SharePoint, but where ever you collect the data, use security and discretion whenever possible.

▸ Sharing *"Bob is always late in his deliverables"* or *"Mary is the worst employee ever"* is not going to help anyone if the information gets out.

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▸ This is the type of information you will hear from your team members.

▸ But what do you do with that information?

▸ Is it helpful for project managers to hear one employee complain about another?

▸ No, not if there is no trend!

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- If there is a trend, watch that trend, not too long, but don't rush it, make sure you are seeing the same thing you are hearing and then react!

- Make sure you don't react too quickly!

- Reacting too quickly, could hurt your reputation with all your team members.

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▸ Watching and listening to your project team members is a critical way of staying connected to your team.

▸ Project managers must spend the time and listen, but don't react immediately.

▸ Building bonds and understanding your team members will give you the best chance of delivering a successful project.

Capturing Lessons Learned Information – Making your current and future projects Smarter! – Summary

▶ Lessons Learned information is critical to start capturing from the very beginning and all throughout the life of the project.

▶ Adding Lessons Learned to your weekly agenda provides that constant reminder to capture this valuable information.

▶ Look for trends, continue for areas of improvement on your project. Course correction throughout your project gives you your best chance of success.

For Additional Information:
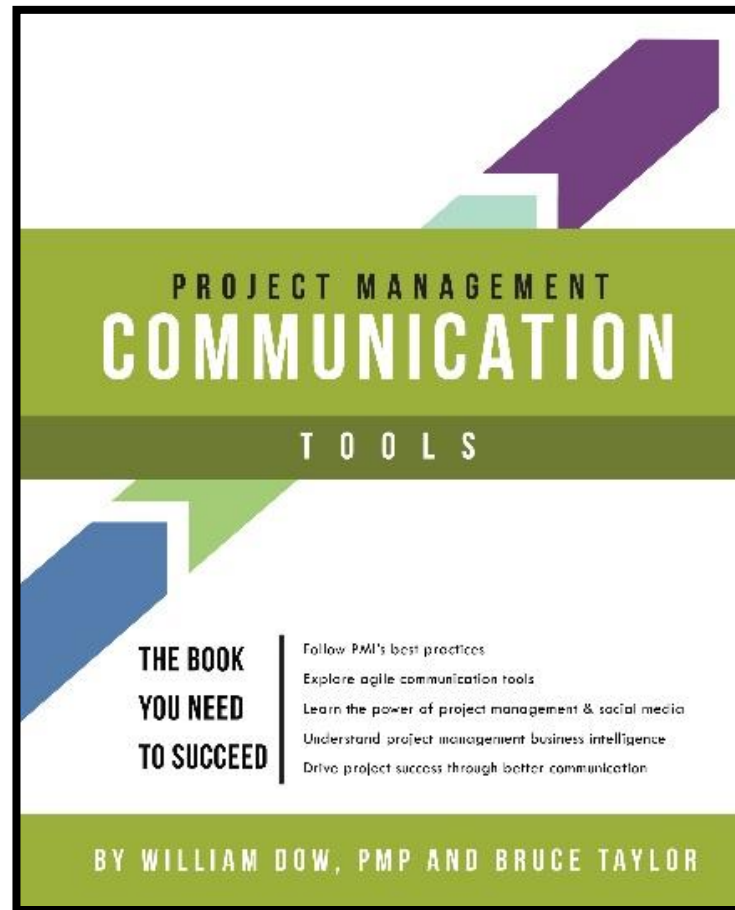
Check out my book "Project Management Communication Tools"

Thanks!