



# Documenting Lessons Learned

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## Video Transcription

Hi, I'm Jeff, and in this lesson we'll learn how a project manager can document the lessons learned during the course of a project. This occurs during the closing process. So let's get started.

Lessons Learned is a shorthand description for the information gained from a current project that can assist future projects and improve the quality of the project management and deliverable creation. It's a formal document that's archived and accessed by the organization and should be available to all project managers. The information documented as Lessons Learned should be relevant and topical to the organization.

Some examples of information that can be described in a Lessons Learned document are red flags. These are any events or issues that created stress in the project. The events were not predicted by the management team. For Lessons Learned, describe these issues and note how the issues were resolved so future projects can learn from the experience and hopefully prevent the same issues from occurring.

Innovative approaches. This should be any innovation that was used in the project and could be used in a future project. This might include innovations with the development of deliverables or innovations with the project management. Critical success factors. Why was this project successful? This can include any factor that was critical and necessary for the project's completion.

Key risks. Not all risks should be listed here. Instead, the project manager should include only the risks that might impact future projects also. Document the contingencies used for these risks as well. Project deliverables. If there was a failure with the project deliverables, such as a performance or quality issue, document why that occurred and suggest how it might be avoided in the future.

External resources used. What external resources were an issue for the project? Recommendations can be provided for external resources on future projects. And project failure. If the project failed, document why this occurred. Be thorough, because even a failed project has value if it helps avoid failure for future projects.

To obtain these Lessons Learned, a project manager must cooperate with the team and the stakeholders. Interviews, surveys, and questionnaires are all excellent methods to gather the necessary details. When documenting the list of Lessons Learned, a project manager must use discretion. Often internal or confidential information is expressed in these lessons. And it may not be appropriate to place that information in the Lessons Learned document. A project manager should also be sensitive when noting individuals in the Lessons Learned.

Once the Lessons Learned have been gathered, they must be communicated to the organization. The best method to communicate the Lessons Learned to the team is with a team meeting, if possible. With a team meeting, everyone receives the information in the same manner. Questions can be asked, and the project manager can provide answers to the team as a whole.

Before this meeting, the project manager should prepare the Lessons Learned document for distribution. The first step will be to create a draft version of the document. Share this draft with key members of the project

team in order to receive their comments. The project manager should then incorporate those comments to create a final version of the Lessons Learned document. This should be shared with the project sponsor and key stakeholders via a meeting or by electronic form.

As with a team meeting, a live presentation is best. But it can sometimes be difficult to coordinate such a meeting with stakeholders once a project is complete. In either case, the comments from the stakeholders should be incorporated into the Lessons Learned document. Once this is done, the document can be shared with the team. It can also be shared with the entire organization at this time using whatever method is commonly used. The material should also be warehoused, along with the other project records.

All right. Good job. In this lesson, we learned how to document lessons learned and then how to communicate those lessons to the stakeholders, the team, and the organization. Thanks and have a great day.



## TERMS TO KNOW

### **Lessons Learned**

Information gained from a current project that can be used in future projects to improve overall quality of project management.