

Lessons Learned

by Sophia Tutorial



WHAT'S COVERED

This lesson provides an overview of documenting lessons learned including:

1. Documenting Lessons Learned
2. Communicating Lessons Learned

1. DOCUMENTING LESSONS LEARNED

Lessons learned are documented during the closing process of a project. It is a shorthand description of the information gained from a current project that can assist future projects and improve the quality of the project management and deliverable creation.

It is a formal document that is 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.

Elements of a lessons learned document include:

- *Red flags.* Any events or issues that created stress in the project or any events that 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.* 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 project management.
- *Critical success factors.* Include factors that were critical and necessary for the project's completion.
- *Key risks.* Only the risks that might impact future projects are documented. Document the contingencies used for these risks as well.
- *Project deliverables.* Document performance or quality issues with the deliverables and why they occurred. Suggest how it might be avoided in the future.
- *External resources.* Include external resources that were an issue for the project. Recommendations can

be provided on future projects.

- *Project failure:* If a 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. A project manager should also be sensitive when noting individuals in the lessons learned document.



TERM TO KNOW

Lessons Learned

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

2. COMMUNICATING LESSONS LEARNED

Once the Lessons Learned have been gathered, they must be communicated to the organization.

If possible, the best method to communicate the lessons learned is with a team meeting. This way, everyone receives information in the same manner. Questions can be asked, and the project manager can provide answers to the team as a whole.



STEP BY STEP

- 1. Plan the meeting and prepare the lessons learned document for distribution.* Create a draft version of the document.
- 2. Get additional feedback, make changes, and finalize the document.* Share the draft with key team members and gather their comments and incorporate the comments to create a final version.
- 3. Send final Lessons Learned to project stakeholders with sign off approval via meeting or electronically.* As with a team meeting, a live presentation is best. However, if that is not possible, comments from the stakeholders should be incorporated into the lessons learned document.
- 4. After final review, Lessons Learned can be shared with the organization.* The document can be shared with the team and also with the entire organization at this time using whatever method is commonly used.
- 5. Archive project documentation.* The material should also be warehoused, along with the other project records.



SUMMARY

In this lesson, you learned how to **document lessons learned** and now understand that it should include elements such as red flags and innovative approaches. While red flags are included, it should not include every risk - only those key to future projects. **Communicating lessons learned** should be conducted within a team meeting if possible in order to answer any questions.

Source: This work adapted from Sophia Author Jeff Carroll.



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