

Applying “Lessons Learned” to a Project

How often does your organization apply the lessons learned from past projects to new projects?

If you say “rarely”, you’re not alone. A recent survey of 961 experienced project managers found that although 62 percent had formal procedures for learning lessons from projects, only 12 percent adhered closely to them.

Yet transferring such knowledge from one project to another can offer enormous benefits, says Dr. Blaize Reich, a professor of management information systems at the Segal Graduate School of Business at Simon Fraser University in Vancouver, B.C. “Lessons learned are the vehicle to improve individual and organizational project competency and project success,” she says.

That’s why she and colleagues Dr. Andrew Gemino, of the SFU Faculty of Business Administration, and Dr. Chris Sauer of Saïd Business School at Oxford University, recently interviewed 15 experienced information technology (IT) project managers in New Zealand and North America. They wanted to discover how organizations capture lessons learned and apply them to new projects.

Their findings, however, were discouraging. “Although many tools and processes exist for capturing such information at the end of a project, few organizations bother to use them,” says Reich. End-of-project post-mortems were infrequently and inadequately performed. “Project managers cited the usual problems,” she says. “A lack of time, key people not available, a culture of blame...” And, as one interviewee noted, “most projects don’t have enough budget to support any good closure.”

Still, the interviews did yield some best practices and suggestions from the project managers, resulting in two key principles that project teams can use to more easily capture lessons learned:

- Project teams should start sharing knowledge at the *beginning* of each project
- Lessons learned should be captured *when* they occur, not later

“These two principles work together,” says Reich. “The first sets a tone of active learning by involving team members in reflective thinking and asking them to pool ideas. The second suggests some timing and techniques to formalize this learning.”

Continuous Learning, From the Beginning

The researchers recommend using a skilled facilitator to lead the initial knowledge-sharing discussion. A good facilitator will encourage people to express their fears and past failures as well as their successes and creative ideas. This information can then

inform planning and risk management for the current project. "By not censoring ideas and views, the project manager can deliberately encourage a culture of learning and speaking the truth," says Reich.

Since most project managers are under pressure to get a project underway quickly and demonstrate early progress, Reich says it's important to incorporate the initial knowledge-sharing meeting into normal planning practices, perhaps during the creation of the risk register or during a methodology acceptance meeting or a regular project planning meeting. All members of the project team should be involved, she says, including the client and sponsor, where possible.

Capture Lessons Learned When They Occur

"Abandon the idea that comprehensive lessons learned can be produced at the end of a project," counsels Reich. Instead, develop a culture, a methodology and tools for creating project logs, then refine these as the project proceeds. This repository of team memory can be used to document critical decisions and train new team members. It will also form the basis for a "lessons learned" document at the end of the project. Individual project managers can each create their own log or a project office could create one all-encompassing log.

The researchers recommend making entries in the project log at several key points in a project:

- At the end of each major phase – as hand-over notes for the next group, noting areas of concern, decisions still to be made, etc.
- Whenever key decisions are made or changed – to document rationale
- Whenever key targets or deliverables change – to identify why this happened, what was decided and whether follow-on work is needed

Project logs are useful for making decisions and rationales available to the entire team," notes Reich. As project phases are debriefed and documented, the team will gain in confidence and cohesiveness. The logs also remove the pressure at project's end to document lessons learned. Says one survey respondent, "All you have to do is go back and synthesize the log and boom, you've got it."

Finally, say the researchers, don't forget to mine the project log for ideas to incorporate into project methodologies.

PMPerspectives.org is a website which connects project managers and sponsors with project management researchers. Our mission is to understand and improve project management practices. The research team comprises Dr. Blaize Horner Reich and Dr. Andrew Gemino from Simon Fraser University, Canada and Dr. Chris Sauer from Oxford University, UK.

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