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Let That Be A Learned Lesson

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After a difficult project is completed, taking time to lead a retrospective may be the last thing you or the team want to do. But a structured review can provide valuable benefits and, it just might make the next project less difficult. Here are some best practices for leveraging lessons learned through project retrospectives.

Retrospectives are structured ways to gather "lessons learned" from those who know best — the people who worked directly on a program or project. Project leaders use what was learned to improve the processes, tools, capabilities and behaviors of their organization. These improvements make future projects more successful.

Unfortunately, retrospectives are unnatural. Esteemed software consultant and author Norman Kerth, sometimes cited as the "father of retrospectives," says, "It is not natural for us to stop, reflect and learn. … I am usually worn out at the end of one of my alligator-infested swamp-draining projects. … The act of reflecting on my just-finished project is not naturally a high priority. Yet it is the key to ensuring that my next project will have less water to drain and fewer alligators to manage."

Despite this obstacle, investing in good retrospectives delivers three important benefits: 1) improves the capabilities of people who work on projects *and* the organization to which they belong; 2) recharges people and repairs damaged working relationships; and 3) fulfills the human need for ritual and closure.

Here are the four foundational steps for conducting a structured retrospective:

1. Prepare: A poorly designed, willy-nilly retrospective can actually do more damage than good. Selecting the wrong participants, creating a bad agenda, or just being unprepared can all sink a retrospective session, especially when emotions run high. Most retrospectives, even those about non-controversial projects, require careful preparation.

2. Hold Retrospective Session: This is where the learning starts to happen, once you overcome issues of safety, blaming, self-protection and poor memory. Here is a good framework for guiding retrospective sessions:

Beginning: Build a good foundation…
 __ Establish an environment of safety and engagement. The majority of participants must feel safe expressing their true observations.
 __ As a group, reconstruct the history of the project by creating a timeline that shows significant events. This tickles memories, as well as increasing interest and curiosity.
Middle: Discover lessons…
 __ List the things that did and did not go well during the project.
 __ Understand the root causes and learn from these events.
End: Set the stage for action on the vital few…
 __ Identify the highest priority lessons.
 __ Recommend actions that will affect skills, tools, processes and behaviors.

3. Analyze Results: Quality expert Joseph Juran famously said that the vital few must be separated from the trivial many. That applies to a retrospective, too. Most retrospective sessions generate a long

list of comments and ideas. The full list will be overwhelming and thus people will not be likely to act on it. This step selects just a vital few ideas to take action on.

4. Take Action: Too many retrospectives stop with a report that gets filed and never seen again. That's a pity. The individuals in the retrospective session will carry away some of the learning just by virtue of attending, but the real leverage of a retrospective comes when the organization agrees to change its tools, processes, and behaviors. Therefore, the keepers of these tools, processes, and behaviors — usually management — must drive follow up actions.

The Prime Directive

Even if you follow these steps, a retrospective will spiral into disaster if you can't keep it constructive. Thus, Kerth requires that a prime directive must guide every aspect of a retrospective. This directive assumes that everyone did his or her best. Participants will not allow blame. Instead, they will be open to learning, even when it is painful.

Embed the Lessons

A retrospective can be the catalyst for four levels of improvement. The lowest levels are the easiest to accomplish but also have the least leverage. For example, by virtue of merely attending the retrospective session, each participant will learn some valuable lessons that he or she can use for self-improvement in the future. This is an example of level one improvement (individual learning).

At level two (team learning), the assembled team learns how they can help each other in the future, if they get the chance work together again. If the learning stops at this point, the organization has only received partial value from its investment in the retrospective. For maximum impact, a retrospective must also change the system, which happens at levels three and four.

At level three (process improvement), the leaders of an organization invest some of the organization's time and resources in follow up actions. These actions are driven by recommendations from the retrospective, so they convert lessons from the project into improvements in the processes, tools, and capabilities that the organization uses for all projects.

At level four the behavior of the entire organization changes. People, especially the leaders, act differently. The new and improved way of doing things is not captured just in processes and tools. It is embedded in the fabric of the organization.

Such systemic change, although difficult, offers huge advantages. The entire performing organization and all future projects improve every time one group of people on a single project learns something. Because the learning effect is multiplied by the number of projects that the organization does, it improves rapidly in small, frequent steps.

Endpoint

Top performing organizations use frequent retrospectives to improve individual and team skills, tune processes, upgrade tools, and change organizational behavior. The key is to take action on the learning to improve the future processes and skills of the organization. This way, the entire organization will benefit from the accumulated experience of everyone who works on projects and programs.

References: *Project Retrospectives: A Handbook for Team Reviews* (Dorset House; 2001) by Norman L. Kerth

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