|  |
| --- |
|  |
| Lessons Learned |
| [Insert Project/Program Name] |

***Purpose of Lessons Learned***

*This document may be used as part of new project/program planning for similar projects/programs in order to determine what problems occurred and how those problems were handled and may be avoided in the future. Additionally, this document details what went well with the project/program and why, so that other project/program managers may capitalize on these actions. Project/program managers may also use this document to determine who the team members were in order to solicit feedback for planning their projects/programs in the future.*

 *While the lessons learned report is part of the Portfolio Management Group’s project/program closure process, lessons learned should be collected throughout the project/program. A log for lessons learned generated throughout the project/program can added to the* [*RAID log*](https://uwaterloo.ca/iist-project-management-office/methodologies/project-management/planning/raid-log)*. If this is for a program, lessons learned should have been collected and summarized at the end of each of the program component projects as well.*

*Review of lessons learned is a required input to project initiation/program definition and drafting the project/program charter.*

***Lessons Learned Contributors***

*Input into the lessons learned may come from many different sources including, but not limited to, project/program manager, project/program team, subject matter experts within business unit(s), and other key stakeholders (such as staff, students, faculty).*

*It is recommended that lessons learned be facilitated by a third party who was not involved with the project/program, who would be the author of this report.* ***PMO resources are available to facilitate lessons learned.***

***Instructions***

1. *Review project/program documentation for lessons learned information. Potential sources include: lessons learned log, meeting minutes, change requests, etc.*
2. *Conduct* *[lessons learned meeting](https://uwaterloo.ca/ist-project-management-office/lessons-learned-meeting). This meeting is best facilitated by a third-party as appropriate.* ***PMO Resources are available to facilitate lessons learned****,* [*Contact the Portfolio Management Group*](https://uwaterloo.ca/ist-project-management-office/about/contact-us) *to request support.*
3. *A survey can be conducted to better facilitate collection of lessons learned. The Portfolio Management Group provides a standardized survey, delivered via web-form.* [*Contact the Portfolio Management Group*](https://uwaterloo.ca/ist-project-management-office/about/contact-us) *to request support.*
4. *Document the key successes and issues for the report. Ensure to categorize issues to aid readers of the report in applying the lesson to their process, document, or lifecycle phase.*
5. *Upload completed document to the* [*TeamDynamix*](https://uwaterloo.teamdynamix.com/) *briefcase. There are instruction about how to enter Lessons Learned in the* [*knowledge base*](https://uwaterloo.teamdynamix.com/TDClient/KB/ArticleDet?ID=49926)*.*
6. *Before you close your project, add your Lessons Learned document to the* [*file cabinet*](https://uwaterloo.teamdynamix.com/TDClient/KB/ArticleDet?ID=43577) *in TeamDynamix.*

***Next Steps***

*Once the Lessons Learned Summary has been completed the key learnings will be included in the Closure Report. It is also recommended that lessons learned be presented to other projects/programs where there may be potential application to the project/program in planning or execution. Please enter your Lessons Learned information into [TeamDynamix](https://uwaterloo.teamdynamix.com/) or contact the PMO to ensure your lessons learned are available in the Lessons Learned repository so that they are available for review during project/program initiation for other similar projects/programs.*

# Summary

*Provide a brief description of the project/program for context. Briefly summarize the key findings from the lessons learned effort for use on other projects/programs. Identify key success factors and major issues, as well as the potential impacts of each that should be considered in the future.*

[Insert Summary]

# Lessons Learned Approach

*Lessons learned are documented throughout the project/program lifecycle. How they are collected and documented is part of project/program planning. Refer to the Project/Program Management Plan for this information and expand as necessary to describe how lessons learned have been collected for this report (e.g. surveys, interviews, group meetings, et cetera). Please refer to PMO’s information on tips for conducting a* [*Lessons Learned meeting*](https://uwaterloo.ca/ist-project-management-office/lessons-learned-meeting)*.*

[Insert Lessons Learned Approach]

# Lessons Learned

*Complete the chart below with details about the Lessons Learned through the project. This chart should include both lessons learned from successes as well as from problems. You may organize the chart by successes vs problems; or you could do 2 charts – one for successes and one for problems.*

*The lessons learned need to be categorized in a consistent manner so they can be retrieved to inform future projects and analyzed to identify trends. If you used the PMO satisfaction survey, please refer to the* [*Appendix*](#Appendix) *for a chart to help with categorizing Lessons Learned based on survey questions. If you did not use the survey, please use any of the following categories for the first column of the chart below: Cost Management, Communication Management, Quality Management, Scope Management, Resource Management, Schedule Management, Stakeholder Management, Benefits Management, Procurement Management, Change Management, Risk/Issue Management, and Project Planning/Monitoring. Two examples are included in green text in the chart (these rows can be deleted from the table for your final report).*

*For the second column, project phases should be one of: initiation, planning, execution, closure. Program phases should be one of: program definition, program benefits delivery, program closure.*

| Lesson Learned Reporting Category(See [Appendix](#Appendix)) | Program/ Project Phase(List the project/ program life cycle phase the lesson learned arose in) | Problem/Success(Describe the problem/success, and its impact) | Lesson Learned(State the actual lesson learned based on the description of the problem/success) | Problem or Success? (indicate whether the lesson was a problem in the project, or a success) | Recommendation(Explain recommended actions to take advantage of this opportunity in the future, or how to improve this issue in the future) |
| --- | --- | --- | --- | --- | --- |
| *e.g. Scope Management* | *Execution* | *Requirements were clearly identified and documented, enabling the team to make decisions that allowed them to remain within scope.** *Requirements were understood by team members*
* *When something new was suggested, it was easy to see that it was out of scope and should not be added*
* *Clear requirements allowed the team to create concise success criteria*
 | *Clear, concise, documented requirements facilitate scope and success criteria decisions* | *Success* | *Maintain clear, concise, documented requirements for the project*  |
| *e.g. Scheduling Management* | *Execution* | *Work not completing to plan due to partially allocated team members having competing priorities.* | *Determine resource availability early in project and address variances in this agreement immediately.* | *Problem* | * *Include explicit allocations as part of resource planning.*
* *Adopt just in time meetings (scrums) or planning aligned with resource availability to manage work.*
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# Process Improvement Recommendations

*Describe any recommendations for process improvements that should be implemented. This is an important step for the University to strive for continuous improvement and provide benefits towards future projects.*

[Insert Process Improvement Recommendations]

# Project Team Members

|  |  |  |
| --- | --- | --- |
| Name | Role on Project | Email |
|  |  |  |
|  |  |  |
|  |  |  |

# Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
|  |  |  |  |  |
|  |  |  |  |  |

# Appendix: Reporting Category Map for Survey Questions

*This map is intended to assist in categorizing lessons learned arising from specific questions on the PMO Project Satisfaction survey. The mapping provides a category for the questions in the 1st and 2nd sections in the survey. The remaining sections of the survey are primarily intended to inform the Closure Report rather than Lessons Learned. The Lessons Learned reporting categories are intended to help capture and report on Lessons Learned to identify areas of potential improvement and opportunities across the project portfolio and to assist Project/Program Managers to retrieve Lessons Learned to help inform future projects and programs.*

|  |  |  |
| --- | --- | --- |
| Survey Section | Survey Questions | Lesson Learned Reporting Category |
| Execution/Control | Budget and costs | **Cost Management** |
| Initiation | Kick off | **Communication Management** |
| Execution/Control | Meetings |
| Communications |
| Status reports |
| Initiation | Project Charter |
| Established governance |
| Closeout | Transition to operations |
| Execution/Control | Procurement | **Procurement Management** |
| Execution/Control | Change | **Change Management** |
| Governance |
| Execution/Control | Quality | **Quality Management** |
| Delivery Methodology | Testing |
| Design and development |
| Integrations and Workflows |
| Implementation |
| Delivery Methodology | Requirements  | **Scope Management** |

|  |  |  |
| --- | --- | --- |
| Planning | Defining project work (tasks, activities) and resource requirements | Resource Management |
| Roles and responsibilities |
| Execution/Control  | Resources |
| Planning | Definition of schedule | **Schedule Management** |
| Definition of work |
| Execution/Control | Schedule |
| Execution/Control | Stakeholders | **Stakeholder Management** |
| Execution/Control | Risks and issues | **Risk/Issue Management** |
| Close out | Realization of benefits, goals, and/or objectives | **Benefit Management** |
| Assessing project success |
| Initiation | Success criteria |

Appendix: Survey Questions

*If a survey was used to solicit responses from project participants include the questions, and selection options for the survey.*