**[Insert Department Name]**

**Lessons Learned**

**[Insert Project Name]**

Version History

| Version # | Date | Author | Key Differences |
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Introduction to the Lessons Learned Template

Lessons learned is a form of continuous improvement in which we learn from both the successes and mistakes of prior endeavors. In order for an organization to improve future performance, it is necessary to formally identify, acknowledge, analyze, and document the lessons learned. This is especially true with projects where resources typically transition to other projects at completion. Collecting lessons learned over time adds to the organization’s body of knowledge related to project management and provides a rich source of information for current and future work.

Lessons learned is conducted at the end of a project, or it may take place between project phases to make the lessons learned available for later phases. This lessons learned template will assist the project team in identifying and recording lessons learned. The template will guide you through the questions of what worked well, what did not work well, and what needs to be done differently. The objective of documenting lessons learned is to identify both the positive and negative lessons learned from the project, as well as to recommend corrective actions based on negative lessons learned observations

The lessons learned template with instructions contains guidelines for properly completing lessons learned. Additional hints, examples, and suggestions are included within each of the template sections and/or tables where key information is recorded.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project. |
| [Instructional text in brackets] | Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
* footers

Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant change are made.

**Project Sample Library:**

The CA-PMF has a Project Sample Library that contains real-world project artifacts from approved projects that you can reference to help you complete CA-PMF templates. Visit the [CA-PMF website](http://capmf.cio.ca.gov/) to access the Project Sample Library.

# Introduction

[Provide a brief description of the purpose of lessons learned and details of what is included in the document.]

*Lessons learned allows a project team to retrospectively contemplate and document the failures and successes experienced on a project to facilitate the knowledge transfer from one team to the next. Capturing this information in a formal fashion creates an artifact that can be utilized during future endeavors to mitigate the chances of repeating a mistake. Project Managers will use this document as they begin planning new projects by instilling the lessons learned in their approach to the Project Management Lifecycle (PMLC). This lessons learned document includes input from the project team as to what went well, what did not go well, why, and what could have been done differently during each phase of the PMLC. These lessons learned were captured during the Closing Process Phase of the project.*

# Lessons Learned Approach

[Describe the process that was utilized to capture these lessons learned, including the approach (such as group brainstorming, surveys, interviews, participants), and what types of information was gathered. The table with all of the lessons learned will follow.]

*All project team members and key Stakeholders participated in lessons learned for this project. One interview was conducted with the Project Sponsor and three facilitated brainstorming sessions were held: one with staff, one with management, and one with oversight and key Stakeholders. The separate sessions ensured that there were only peer-to-peer relationships within each group to facilitate open and honest communication. A non-project team member was used to facilitate the meetings to prevent any bias in leading the discussion.*

*The project team members were asked to identify and delineate lessons learned by process phase (Concept, Initiating, Planning, Executing, and Closing) and by the following categories:*

* *Cost*
* *Communication*
* *Documentation*
* *Processes*
* *Procurements/Contracts*
* *Quality*
* *Resources/Staffing*
* *Schedule/Time*
* *Scope/Requirements*
* *Tools*

*To encourage the thought process, the facilitator prompted the participants with the following questions in relation to each process phase and category identified above:*

* *What worked well for this project or for the project team?*
* *What did not work well for this project or for the project team?*
* *What could have been done over or differently?*
* *What surprises did the team have to deal with?*
* *What project circumstances were not anticipated?*
* *Were the project goals attained? If not, what changes need to be made to meet goals in the future?*

*For the facilitated brainstorming sessions, large sheets of paper were placed around the room, one for each category. Participants were provide with sticky notes to capture their lessons learned. The participants placed the notes on each sheet of paper, making sure to annotate the process phase where it was applicable. The participants collaboratively discussed each comment to further define the lesson learned and also to ensure that there was a recommendation included. All lessons learned are documented in the table below. Where there was repetition and similar themes across multiple lessons learned, those lessons learned have been consolidated into a single lesson learned.*

# Lessons Learned Table

[Complete the following table. Identify the process phase (Concept, Initiating, Planning, Executing or Closing), the categories (such as cost, communication, documentation, processes, procurements/contracts, quality, resources/staffing, schedule/time, scope/requirements, and tools), the lesson learned, a description of the lesson learned, and a recommendation to implement the lesson learned.]

| ID | Process Phase | Category | Lesson Learned | Description | Recommendation |
| --- | --- | --- | --- | --- | --- |
| *1* | *Planning* | *Resources* | *Not enough staff* | *The Planning Process Phase for this project took significant effort to develop plans and methodology, and to navigate the Project Approval Lifecycle. Only two resources were allocated for this work – the Project Manager and an analyst. There were too many concurrent work streams for the two resources to complete.* | *The full scope of activities during the Planning Process Phase needs to be taken into consideration when resourcing the work. If additional resources are not available, the schedule must be pushed out.* |
| *2* | *Executing* | *Scope/Requirements* | *Too many new requirements* | *During the project development phase, the business owners consistently introduced new requirements into the scope of the project without adjusting the schedule milestones. The project was continually missing milestones to accommodate the additional work.* | *Project scope needs to be locked down during project development, or management needs to acknowledge the additional work and re-baseline the schedule. Staff cannot continually absorb additional work to maintain the schedule.* |
| *3* | *Executing* | *Tools* | *Document management system was difficult* | *The document management system used on the project was sufficient during the Planning Concept Phase when there were a limited number of project documents. However, during the Executing Process Phase, a lot more project documents were developed and stored in the system. It became difficult to find documents.* | *Time needs to be allocated to configure the document management system to be more user friendly, or another tool with greater functionality needs to be used.* |