

1. **[Insert Project name]**
2. **[Insert Project number]**

**Lessons Learned Workshop Agenda**

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# 1.0 Document Control

**Document History**

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| Date | Version | Author | Comments |
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**Review Panel**

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| **Review Panel** | |
| **Name** | **Role** |
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**Approvals**

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| Version | Approval Date | Approver Details |
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**Supporting Documents**

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| Document | Location | Owner |
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**2.0 Project Summary**

The project is summarised as follows:

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| --- | --- |
| Project Title |  |
| Project Number |  |
| Project Sponsor |  |
| Approval Body |  |
| Approved Budget |  |
| Project Lead |  |

# 3.0 Lessons Learned Workshop Agenda

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| INTRODUCTION: Lessons Learned Meeting Agenda |
| *The agenda template is shown on the following page.*  What This Is  An example agenda for a half-day lessons learned meeting at the end of a project (sometimes called a Project Closeout Meeting). It includes:   * who should attend * meeting objectives * meeting deliverables * agenda items, showing a suggested sequence of team discussion, brainstorming, and analysis by which the team can agree upon what went well on the project, what didn’t, and what should be done differently next time   Why It’s Useful  The only way to avoid problems happening yet again in the future is carefully consider what went wrong and why, and make sure there is a way to transfer related recommendations forward. Likewise, teams can help others repeat their successes only if they somehow can express concretely what went well, and why. The specific lessons and recommendations generated in this kind of meeting will yield concrete actions for other teams.  How to Use It   1. Edit the example agenda subjects to reflect any specific areas or descriptions of what your meeting should cover. Adjust the timeslots for a longer or shorter meeting depending on your project and how much discussion you think will be needed. 2. Adjust the attendee list to include specific names and their departments/functional groups, to help ensure that you’re inviting everyone that should be there. 3. Check this draft invitee list with your core team and solicit ideas for who else should be invited. Often team members will think of key individuals who might have been a heavy participant at some point, with valuable information to relay. For instance, “We should invite Joe. He had to deal with all those problems in production; he’ll be able to talk about impact and what we should have done differently in the design.” 4. Allow enough time ahead of the meeting to allow the project manager and others to gather or compile information for reference. For example, during the first part of the meeting, the team reviews the original planned major milestone dates vs. the dates those milestones were actually achieved. That information should be brought to the meeting rather than creating it from memory on the spot. 5. Send out the agenda, with appropriate statements about the importance of attendance by all invitees and expectations about ‘tone’ and spirit of the meeting. (Specifically, lessons learned meetings must be objective and professional – no “blame games” allowed.) |

**Example Outline for an End-of-Project Lessons Learned Meeting**

Agenda: Company X Project Y Lessons Learned Meeting

8:30 a.m. to 12 noon November 21, 20xx

**Attendees:**

* Project Manager and core team members from each functional group
* Other key functional representatives who were heavily involved in the project; their functional managers as desired, or as specifically requested by the Project Manager or Project Sponsor
* Project sponsor

**Meeting Objectives:**

1. Understand how this project performed against its original goals (time, resources/costs, scope).
2. Identify Project Y “lessons learned” and recommendations for future projects.
3. Set actions to ensure lessons learned are considered during planning of next year’s program.

**Deliverables from Meeting:**

* Full report including:
  + Review and analysis of plan vs. actual milestone achievement and state of what we delivered vs. the original requirements
  + Team’s brainstorm list of wins and challenges
  + Team’s list of derived recommendations for achieving the wins and avoiding the challenges on future projects
  + Open issues list and action items
* Key items will be turned into templates and checklists for use during projects.

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| **Agenda Item** | **Facilitator(s)** | **Time** |
| Get breakfast, introduction, agenda review, ground rules |  |  |
| **Wins and challenges**  Project retrospective: Review planned vs. actual on major milestones and how what we released mapped to original major requirements.  Round-robin brainstorm: Go around the table and record a win or challenge from each person. Keep going until no one else has items to add.  Map back to major project issues—which challenges contributed most to milestone and vision shortfalls? Which wins contributed *most* to what the project accomplished? |  |  |
| *Break* |  |  |
| **Create lessons learned recommendations**  Wins: what do we think other projects should do to achieve these wins?  Challenges: how should future projects avoid each issue we identified? |  |  |
| **Next steps**  Discuss how lessons learned recommendations will be brought to kickoff activities for next year’s development program.  Review action items and finalize assignments. |  |  |