



LESSONS LEARNED

A conversation between project managers at ***Future Learning Company***

Presented by: ***Tom Gray, PMP***



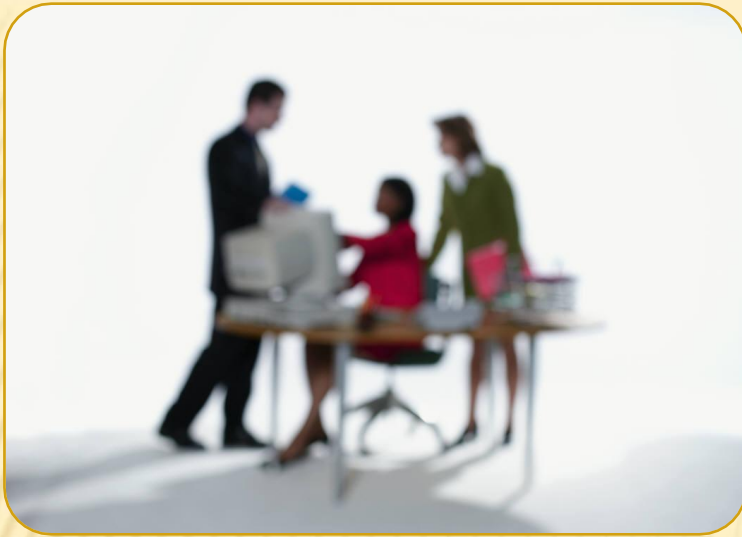
A conversation between
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- ✘ (KELLY) *“That database conversion project for Sales was the worst experience ever!”*
- ✘ (STEVE) *“Yeah, with all of the changes and then the arguments about the way the U/I screens were designed, I was glad when the project ended.”*
- ✘ (KELLY) *“Just exactly when did it end because I’m still getting requests to make changes?”*
- ✘ (LANDON) *“I thought Sales finally agreed to use the U/I ‘as is’ until they can clarify what they want. So who is asking for changes?”*



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- ✘ (KELLY) *“Marketing is complaining because some of the legacy data fields are no longer supported and Customer Support is complaining because they can no longer look up volume discount information to assist customers. No one is organizing or reviewing requests so it is very frustrating.”*
- ✘ (STEVE) *“This project was requested by Sales and was not supposed to impact anyone else.”*
- ✘ (KELLY) *“Well apparently the database was more widely used than we thought. I learned that besides Marketing and Customer Support, the Purchasing Group and HR are also using it.”*



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- ✘ (LANDON) *“So are you making any changes?”*
- ✘ (KELLY) *“I’m assigned full time to two other high priority projects and my boss told me to ignore any other requests. But people from all groups seem to think that if they tell me to make the changes it will get done.”*
- ✘ (STEVE) *“If you’re not running that project then who is?”*
- ✘ (KELLY) *“I don’t know. I’ve seen no communications in over two weeks.”*



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- ✘ (LANDON) *“Jim from Accounting said that project was way over budget and Terry in Sales says that no one has been trained on it and many people are still using the old database which remains operational because of errors in the legacy data conversion.”*
- ✘ (KELLY) *“I’m getting heat from everyone and this project may tarnish my image.”*
- ✘ (STEVE) *“You did remember to document everything as part of your ‘Lessons Learned’ so that you could use it on future projects didn’t you?”*



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- ✘ ***Does this sound familiar to you?***
- ✘ ***If you were Kelly what would your Lessons Learned include?***



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A few suggestions to get started:

- ✘ Stakeholder Identification
- ✘ Requirements Specification and Approval Process
- ✘ QA Validation
- ✘ Scope Control/Change Control
- ✘ Project Sponsor/Owner
- ✘ Resource Scheduling
- ✘ Training
- ✘ Risk Mitigation
- ✘ Project Closure
- ✘ Communication



STAKEHOLDER IDENTIFICATION

- ✘ *Verify that Stakeholder Identification occurred.*
- ✘ *Even though Sales was the requesting group it is now obvious that the database was more widely used within the organization. The database may also interface with external sources including suppliers and/or customers, other business operations such as sister companies or partners.*
- ✘ *Stakeholders include all parties impacted by the project; those who support it and those that oppose it (if they exist). In this case it includes Sales, Marketing, HR and Purchasing departments and all individuals within these groups that will be required to operate the system or those who get information from it. A loss of legacy data points could create a negative stakeholder (Marketing in this case) as noted earlier.*
- ✘ *(Clarification) Stakeholders include anyone that is impacted by or has an interest in the efforts/results of the project.*



REQUIREMENTS SPECIFICATION AND APPROVAL PROCESS

- ✘ *Verify that detailed requirements exist.*
- ✘ *Verify that an approval process for the requirements exists and has been executed.*
- ✘ *It appears that someone within the Sales group is not happy with the implementation of the U/I (User Interface). This could be attributed to a deficiency in the detailed requirements specification, a lack of a final approval process to clarify what will be built or it could indicate that the deliverables did not align with the approved requirements. If the team failed to deliver according to the requirements this may indicate a lack of proper QA validation.*
- ✘ *In this example it is not clear what the root cause is for the Sales group's dissatisfaction. A review of the approved requirements and assessment of the U/I should provide clarification.*



QA VALIDATION

- ✘ Verify that QA Validation was part of the process
- ✘ If the deliverables do not match the approved requirements then some changes within the QA validation process are required. All project deliverables should be validated to insure alignment with the business requirements. Having QA involvement from the beginning of the project could identify any potential deviations before any physical work is started. Corrective action is least expensive in the beginning of the project.



SCOPE CONTROL/ CHANGE CONTROL

- ✘ Verify that a Scope Control/Change Control process is in place.
- ✘ Continuous changes throughout a project may indicate that the scope control/change control process is not working properly.
- ✘ Change requests do not equate to changes implemented. Critical changes may need to be accommodated; some may require scope trade-off to avoid unnecessary scope bloat, which can result in cost over runs and schedule delays. Other requests may be recorded for future updates while others are rejected.
- ✘ A project without an effective Scope Control/Change Control process is likely to fail.



PROJECT SPONSOR/OWNER

- ✘ Has the Project Sponsor/Owner been identified?
- ✘ Is there a process for properly channeling change suggestions for approval?
- ✘ The Project Sponsor/Owner should always be aware of change requests that are being made by others and they should have the authority to approve or reject requests as they deem necessary. After all, they are funding the work and will be responsible for being good steward's of the company resources.
- ✘ The project manager is fielding requests directly from all departments and there appears to be a lack of adherence to proper process.



RESOURCE SCHEDULING

- ✘ Kelly clearly is assigned to other projects. Other resources may or may not be available and/or assigned to continue work on this project.
- ✘ Since Kelly was the project manager on this effort he should have the resourcing information.



TRAINING

- ✘ Is there a training plan?
- ✘ Confirm the status of the training delivery and if no training has been provided, determine what approval processes were bypassed allowing the new database to go online without proper user readiness.
- ✘ Training must accommodate all users of the system across all departments impacted, not just the Sales department.



RISK MITIGATION

- ✘ Have risks been tracked, assigned for review and mitigation plans documented?
- ✘ The following Risks have been identified in the conversation:
 - ✘ Continuous changes requested from various sources without proper channeling
 - ✘ Issues with the U/I exist
 - ✘ Stakeholders may not have been fully identified
 - ✘ New and legacy databases operating simultaneously, data migration/data loss
 - ✘ Also - System Errors, Resourcing, Budget, Training, User Adoption and Communications



PROJECT CLOSURE

- ✘ Is there a formal project closure process?
- ✘ Has the formal project closure (sponsor acceptance and sign-off) occurred?
- ✘ Does some confusion exist as to the completion of the project?
- ✘ Have resources been officially released from the project?
- ✘ Have lessons learned been captured and post mortem reviews taken place?



COMMUNICATION

- ✘ Verify that Communication process/plan is in place.
- ✘ All three Project Managers seem confused about the status of the project which could indicate that communications have been less than adequate.
- ✘ Continuous arguments about the product deliverables raise the question about sufficient communications and the setting of expectations to the stakeholders.
- ✘ Confusion on this project could be reduced and/or remedied by improved communications.



COMMUNICATION

- ✘ Suggestions for improved communications include:
 - ✘ Communications restating the process for change requests
 - ✘ Announcing project completion
 - ✘ Communicating Kelly's new reassignments
 - ✘ Publish the time-line for the legacy database shut-down
 - ✘ Communicate the training schedule for the new system
 - ✘ Communicate the benefits of the new project and system
 - ✘ Communicate future updates to the system, including scope and timing
 - ✘ Continuous communications as part of a project's transformation and change effort should be employed. Consider using surveys, tips, request for feedback, success stories and examples, sponsor testimonies, etc.



WHY USE LESSONS LEARNED?.....

- ✘ Better preparation and organization increasing project success
- ✘ More reliable requirements and clearer implementation
- ✘ Improved Risk identification/awareness based on past experience with the same people and organizations
- ✘ Professional credibility (Establishing and maintaining)
- ✘ Others?

Lessons Learned

Project Title: _____

Date Prepared: _____

Project Performance Analysis		
	What Worked Well	What Can Be Improved
Requirements definition and management		
Scope definition and management		
Schedule development and control		
Cost estimating and control		
Quality planning and control		
Human resource availability, team development, and performance		
Communication management		
Stakeholder management		
Reporting		
Risk management		
Procurement planning and management		
Process improvement information		
Product-specific information		
Other		

SAMPLE TEMPLATE

<Project Name> | CONFIDENTIAL AND NOT FOR DISTRIBUTION | 8/31/2011

Lessons Learned

Risks and Issues			
ID	Risk or Issue Description	Response	Comments

Quality Defects

Description	Resolution	Comments

Vendor Management			
Vendor	Issue	Resolution	Comments

Other	
Areas of Exceptional Performance	Areas for Improvement

SAMPLE TEMPLATE



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Questions or Comments?



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