



*rego*University 2017

Lessons Learned | Best Practices

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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Project Closure Activities
- Open Mic
- Benefits of capturing Lessons Learned and Survey
- Review of Lessons Learned module
- Open Mic
- Review of Closure Survey module
- Open Mic
- Wrap-up/Questions

Typical Project Closure Activities

- Validate user acceptance
- Consolidate all artifacts for archival
- Confirm all risks and issues resolved or transferred to competent authority
- Close project legally (contracts, etc)
- Close project financially
- Clean up project schedule (remove any remaining ETC, mark tasks and milestones complete, and zero out remaining resource allocations)
- Execute final communication plan
- Execute training plan
- **Lessons Learned and Closure Survey (topic of this presentation)**

- How Many of you Have Lessons Learned Sessions? Do you store or report on that data?
- How many of you do a customer or team survey? Do you store or report on that data?
- How is this historical Data used in your organization?

Lessons Learned & Closure Survey

- Metrics and Measures for continuous project process improvement
- Honest and anonymous feedback
- Can include input from both project team and business leaders
- Global searches enabled via portlets
- Module components highly configurable

Lessons Learned Input Page

7

General

★ Name

Lesson Learned 1

★ Type

Education-Training

Detailed Description

detailed description

Action Strategy

action

Attachment

Character Count.xls

Browse...

No file selected.

Save

Save And Return

Return

★ = Required

✱ = Unique

Project Lessons Learned List

8

Filter: System Default ▾

ID

Name

Type

Created By

Power Filter [\[Build Power Filter\]](#)

Filter

Show All

Save Filter

Clear

<input type="checkbox"/>	ID▲	Name	Type	Detailed Description	Action Strategy	Attachment	Created By	Created Date
<input type="checkbox"/>	LL-00003	Lesson Learned 1	Education-Training	detailed description	action	Character Count.xls	Hoaldrige, Jon	3/17/16
<input type="checkbox"/>	LL-00006	Lesson Learned 2	Team Dynamics-Collaboration	Detailed Description	Action Strategy		Hoaldrige, Jon	3/21/16

Displaying 1 - 2 of 2

Save

New

♥ Delete

Return

Enterprise-wide Lessons Learned Portlet

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Overview: Lessons Learned / Survey

Lessons Learned

Lesson Learned Name

Type

Created By

Project ID

Project Name

Power Filter

[Build Power Filter]

Filter

Show All

Save Filter

Clear

Project ID▲	Project Name	Name	Type	Detailed Description	Action Strategy	Attachment	Created By	Created Date
PRJ0242	JH Test Project	Lesson learned 3	Tool Configurations-Reports	Detailed Description	Action Strategy		Hoaldridge, Jon	3/21/16
PRJ0251	JH Test Cost Smoothing	Lesson Learned 1	Education-Training	detailed description	action	Character Count.xls	Hoaldridge, Jon	3/17/16
PRJ0251	JH Test Cost Smoothing	Lesson Learned 2	Team Dynamics-Collaboration	Detailed Description	Action Strategy		Hoaldridge, Jon	3/21/16

Displaying 1 - 3 of 3

Open Mic

- Is this Lessons Learned Module something your organization can use?
- How would you make it better?



Project Closure Survey Initiation Page


Properties ▾	Team	Tasks	Financial Plans	Risks/Issues/Changes	Chargebacks	Hierarchy	Processes	Audit Trail	Collaboration	Dashboard
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Project: JH Test Cost Smoothing - Properties - Main - Survey Initiation

General

Survey Name

Survey Participants  

Survey Due Date 

Distribute Survey to Participants Now ☐ (Complete all fields before checking this box.

Project Closure Survey Edit Page

Project Closure Survey: JH Test Survey - General - Properties

General

Project Name	JH Test Cost Smoothing	Survey Due Date	4/1/2016
Survey Name	JH Test Survey	Survey Completed	<input checked="" type="checkbox"/>
Survey Participant	jhtester, jhtester	(Check this box only after answering all questions.	

Customer Satisfaction

Responsibilities were clearly identified	(4) Agree	Project produced a high quality result	(4) Agree
Responsibilities were appropriate	(4) Agree	Project team members were capable	(4) Agree
Issues and Risks were addressed appropriately	(5) Strongly Agree	Project team members worked well together	(5) Strongly Agree
Team meeting time was well used	(3) No Opinion	Project was completed on schedule	(4) Agree
IT staff members communicated well with business representatives	(2) Disagree	Project milestones were met as expected	(4) Agree
The Team Understood the business needs	(4) Agree	The results of this project will meet the business needs	(4) Agree
The team identified realistic alternative solutions	(5) Strongly Agree		

= Required = Locked by Process

Project Closure Survey List

Project Closure Survey List

Filter: None ▼



Project Name

Survey Name

Power Filter [\[Build Power Filter\]](#)

Filter

Show All

Save Filter

Clear

<input type="checkbox"/>	Project Name	Survey Name▲	Survey Participant	Survey Due Date	Responsibilities were clearly identified	Responsibilities were appropriate	Issues and Risks were addressed appropriately	Team meeting time was well used	IT staff members communicated well with business representatives	The Team Understood the business needs	The team identified realistic alternative solutions	Project produced a high quality result	Project team members were capable	Project team members worked well together	Project was completed on schedule	Project milestones were met as expected	The results of this project will meet the business needs
<input type="checkbox"/>	JH Test Cost Smoothing	JH Test Survey	jhtester, jhtester	4/1/16	(4) Agree	(4) Agree	(5) Strongly Agree	(3) No Opinion	(2) Disagree	(4) Agree	(5) Strongly Agree	(4) Agree	(4) Agree	(5) Strongly Agree	(4) Agree	(4) Agree	(4) Agree

Displaying 1 - 1 of 1

Project Closure Survey Scores Portlet

Overview: Lessons Learned / Survey

Lessons Learned

Project ID▲	Project Name	Name	Type	Detailed Description	Action Strategy	Attachment	Created By	Created Date
PRJ0242	JH Test Project	Lesson learned 3	Tool Configurations-Reports	Detailed Description	Action Strategy		Hoaldrige, Jon	3/21/16
PRJ0251	JH Test Cost Smoothing	Lesson Learned 1	Education-Training	detailed description	action	Character Count.xls	Hoaldrige, Jon	3/17/16
PRJ0251	JH Test Cost Smoothing	Lesson Learned 2	Team Dynamics-Collaboration	Detailed Description	Action Strategy		Hoaldrige, Jon	3/21/16
PRJ0254	JH End-to-End Test Project Closure	Lesson Learned #1	Testing	detailed description	action strategy	Character Count.xls	Hoaldrige, Jon	4/15/16
PRJ0254	JH End-to-End Test Project Closure	Lessons Learned #2	Management Involvement	detailed description	action strategy		Hoaldrige, Jon	4/15/16

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Save

Project Survey Information Filter

Project ID: PRJ0254

Filter Show All Save Filter Clear

Project Survey Information

Project	Survey▲	# Asked to Participate	# Completed
JH End-to-End Test Project Closure	JH Closure Survey for end2end project	2	2

Displaying 1 - 1 of 1

Survey - Project Customer Satisfaction Total

Survey Question▲	Average
01. Responsibilities were clearly identified	4.5
02. Responsibilities were appropriate	4.5
03. Issues and Risks were addressed appropriately	3.5
04. Team meeting time was well used	4.0
05. IT Staff members communicated well with business representatives	4.0
06. Team understood the business needs	4.0
07. Team identified realistic alternative solutions	2.0
08. Project produced a high quality result	4.5
09. Project team members were capable	4.5
10. Project team members worked well together	4.0
11. Project was completed on schedule	4.0
12. Project milestones were met as expected	5.0
13. Results of this project will meet the business need	4.0
Total for Customer Satisfaction	4.0

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Open Mic

- Is this Survey Module something your organization can use?
- How would you make it better?

Questions?



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Let Rego be your guide.

Thank You For Attending regoUniversity

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- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



Let us know how we can improve!
Don't forget to fill out the class survey.



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