

The background of the slide is a photograph of a hiker with a large orange backpack standing on a rocky outcrop, looking out over a vast mountain range. The mountains are covered in green forests and have rocky peaks. The sky is blue with white clouds. In the top left corner, there is a semi-transparent geometric overlay consisting of white lines forming a complex, crystalline shape.

regoUniversity 2018

Lessons Learned | Best Practices

Your Guides: Sara Garvey and Doug Greer

Introductions

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



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

Introduction

Have you ever thought about tracking customer feedback as part of your project closure?

This class will show how lessons learned can be entered and tracked within CA PPM.

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)**

Open Mic

- 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
 - Project Closure Surveys are only anonymous between responders. The person that requested the feedback knows who sent what.
- Can include input from both project team and business leaders
- Global searches enabled via portlets
- Module components highly configurable

Lessons Learned Input Page

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

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

Overview: Lessons Learned / Survey



Lessons Learned

Lesson Learned Name

Project ID

Type

Project Name

Created By

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		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

Displaying 1 - 3 of 3

Best Practices for Lessons Learned

- Lessons Learned can be entered at the end of each phase not just at the end of the project.
- There should be a Lessons Learned session with just the project team and then another that includes a larger group of stakeholders.
- All stakeholder groups should have an opportunity to contribute to Lessons Learned.
- Ensure the PM process includes the Lessons Learned from previous projects as an input to planning.
- Have a PMO process that periodically reviews survey results and lessons learned for possible process improvement opportunities.

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

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.

Save


Save And Return

Return



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 ☒
(Check this box only after answering all questions.)


 Survey Participant jhtester, jhtester


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

Save

Save And Return

Return

 = 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

Displaying 1 - 5 of 5

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

Displaying 1 - 13 of 13

Best Practices for Project Surveys

- In preparation for completing the survey the sponsor should review a document that outlines the details of the project. scope/schedule/scope performance, change request list, lessons learned, etc.
- Larger projects may want to consider multiple surveys (one per release, etc)
- Track and display aggregated survey results.
- Have a PMO process that periodically reviews survey results and lessons learned for possible process improvement opportunities.

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

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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



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