Guide to the Retrospect Technique– A Proven Method for *Learning After Doing*

What is a Retrospect?

A Retrospect is a simple tool for learning after an event, activity or major milestone in a project or program. It is a team meeting called after completion of a piece of work.

Objective & Benefits

The objective of a Retrospect is to capture the new knowledge of the team. The benefits of a Retrospect are:

- Identification of valuable lessons;
- Enhanced team openness and cooperation;
- Achievement of closure at the end of the project.

How to Hold an Effective Retrospect

1. Plan the meeting

- Don't try to conduct a Retrospect by e-mail; it needs to be a face-to-face round table or videoconference.
- Hold the meeting as soon as possible after the project ends, ideally within a couple of weeks. Memories fade. If you wait too long, events become post-rationalized.
- The time set aside for the Retrospect will depend on the number of people involved and the duration and complexity of the project. A very small project (3-4 people, 2-4 months) can be covered in 60 minutes. A 10-person, 6-month project may need four or more hours. A complex alliance between several companies may need two days.
- Consider using audio to record the event. Although this will take extra effort, it will be a valuable source of knowledge for the future and will help provide details in the documentation phase. Using video can be very useful for capturing short video-clips of personal insights (knowledge 'nuggets') to publish and help transfer lessons to others. But, unless you are prepared to 'do it right' with skilled video production experts this should not be attempted. Special care should be taken to ensure videotaping doesn't hamper the open exchange of information and knowledge or disrupt the process.

2. Invite the right people

- The project leader needs to attend, as do the project customer and key members of the project team. It is often useful to invite potential customers for the learning (such as people starting similar projects), but their involvement must be managed in a very sensitive manner to ensure their presence doesn't reduce the open flow of knowledge by the team that performed the project.

- Ask the project leader to schedule the meeting. He or she has the most ownership, knows who needs to attend, and may retain some influence with the project team.
- In the call to attendees, announce that the purpose of the meeting is to make future projects run more smoothly by identifying the learning points from this project.

3. Appoint a facilitator

- You will need a facilitator who was not closely involved in the project; otherwise, the meeting will concentrate on "what we did" rather than "what should the next team do" in similar circumstances. If the facilitator is very remote from the project, she or he may need to do some preparation (such as having discussions with key players and others to understand the work context) or have a person from the work area assist him or her in the meeting (take notes as well as help with language and definitions as they arise in the conversations).
- The facilitator needs to reiterate that the purpose of the meeting is to make future projects run more smoothly by identifying the learning points from this project. The purpose is not to assign blame or praise.
- The facilitator needs to encourage an atmosphere that allows participants the freedom to express opinions critical of anyone. If necessary, introduce "rules of the game." Particular care must be made to 'coach' the project team leader in advance of the session so that their participation doesn't influence the open exchange of knowledge.

4. Revisit the project's objectives, deliverables, and measures

- This is the point at which you ask, "What did we set out to do?" and "What did we really achieve?"
- The facilitator may want to ask the customer, "Did you get what you wanted?"
- It often helps to have the team leader to list the objectives in advance and have them posted on a flipchart to use to prompt the team for input. If this approach is used, be sure to encourage the team to modify and add objectives as they understood them for the project. Any differences may point to key learning areas to prompt for later.

5. Revisit the project plan, process and/or timeline

- Some facilitators like to construct, with the team, a flow chart of what happened, identifying tasks, deliverables, and decision points. This way, you can identify those parts of the project that experienced delays, were completed ahead of time, were particularly efficient or inefficient, and where the team was unclear about what really occurred.
- You can then draw an idealized process: how it should have worked!
- Another approach is to construct a timeline that identifies key milestones, deliverable and events. This is used to help refresh the memory of the team

and may point to key learning areas for further discussion in the following sections. If this approach is used, a good idea is to have the team leader build this in advance on flipchart paper (may take several sheets) and have it posted on the wall in the room for people to review and discuss. Leave space for people to add items that stood out for them

6. **Next, ask, "In the context of reaching the objective, what went well?"**
   - Always start with the good points! We want to build on best practice as much as we want to avoid repeat mistakes. It is best to start the meeting on a positive note.
   - Go around the table asking each individual what their success factors were.

7. **Find out why aspects of the project went well and express the learning as advice for the future**
   - We are getting to the meat of the meeting, now. Identify the success factors, so they can be repeated in the future.
   - Ask such questions as: "What repeatable, successful processes did we use?" "How can we ensure future projects go just as well or even better?" "Based on your success with this project, what would your advice be to future project teams?"

8. **Then, ask: "What could have gone better?"**
   - There are bound to be some areas where things could have gone better, where pitfalls were identified too late, and where process was suboptimal. Go around the table again and ask each individual. You may want to start with the team leader. If the team leader admits that things could have gone better, a good precedent has been set for others to speak openly.

9. **Find out what the difficulties were**
   - The facilitator should ensure that this section of the process does not become a witch-hunt or a finger-pointing exercise. If necessary, remind the meeting that the purpose of the meeting is not to assign blame, but to make sure similar projects go smoothly in the future. Think positively!
   - Identify stumbling blocks and pitfalls, so they can be avoided in future. The following questions are useful: "Given the information and knowledge we had at the time, what could we have done better?" "Given the information and knowledge we have now, what are we going to do differently in similar situations in the future to ensure success?" "Based on your experiences with this project, what would your advice be to future project teams?"

10. **Make sure the participants leave the meeting having had their feelings acknowledged**
    - You do not want anyone to leave the meeting feeling that things were covered-up or that valuable effort was not acknowledged.

- To help you access residual feelings of dissatisfaction, begin by asking people for a numerical rating of the project. Ask, "On a scale of 1 to 10, how satisfied are you with this project?" You can then ask, "What would have made it a 10 for you?"
- This will often result in bringing some new information into the room from some of the team that didn't express their views previously. This may be source for follow-up and further discussion.

11. Summarize the learning from the project in terms of "lessons for the future"

- Meeting results are intended for teams running similar projects in the future.
- Express the lessons as advice. Express them as clearly, measurably, and unambiguously as possible. Ask yourself, "If I were the next project leader, would these lessons be of any use to me?"
- Make sure you circulate the lessons, together with any other outcome from the meeting. Ask participants to comment. Make sure no one is misquoted and that the facilitator's wording of the lessons really reflects the views of the team.

12. Plan for Action (Optional)

- Some teams will want to use the opportunity and findings from the session do some action planning to:
  - Address some of the lessons that emerged that are highly relevant to their team's on-going performance;
  - Pursue things they now want to differently;
  - Further explore and analyze specific areas that went well, or could have been more effective, which were identified but time didn't allow for thorough discussion.
- Capture the key actions in a simple table format on a flip chart: What, Who and By When.

13. Record and publicize the lessons

- Make sure that people looking for these lessons will be able to find and understand them, and that they know how to contact the people involved. Put the lessons on the organization's internal Intranet or portal and make them searchable. Make sure the context is explained and include links to the people who can explain the lessons and other relevant documents that others may find useful in helping to re-use or adapt the lessons.

This guide is based on the work of Kent Greenes (www.greenesconsulting.com) and the KM Team at British Petroleum from 1995 to 1999.