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The Essential Guide to

POST MORTEM REVIEWS

“We do not learn from experience... we learn from **reflecting** on experience.”

John Dewey

As busy as we all seem to be, it's tempting to jump from one project to the next without genuinely reflecting on the conclusion of a project to really understand more deeply what happened? What did we learn? How did we grow? What do we want to do in the future as a result of this learning and growth? In a recent Harvard study, researchers found "individuals who engage in deliberate learning efforts experience **higher performance improvements** as compared to individuals who have simply accumulated additional experience.

Project post-mortem (PPM) reviews are essential to getting better as an individual and as a team, but they can be tricky. Use this Guide and the tips below to navigate this learning process.

3 Tips for Getting the Most Out of the PPM Review Process:

- Avoid blame at all costs! One way to do this is to focus on the processes and the actions associated with the project, not the person responsible. Keep names out of it. Even if there were individual performance breakdowns, a group PPM review is not the place to tackle those issues.
- End on the positive. Conclude with the success, learning, and growth the team and organization has experienced.
- Share the results. The learning experience multiplies when the entire organization can learn from project post-mortems.

Hard-work and discipline are required to perform PPM reviews. They can be uncomfortable, and frankly, some people want to just put the project behind them. But if you can power through the process of deliberate learning, the closure, clarity, and camaraderie will make it worth it.

Work well,

Adriana



PROJECT GOALS REVIEW

What did we think would happen? Pick a person (or ask for volunteer) to describe what the organization's goals were for the project. What did we think would happen? After the person finishes, let the group add to this part of the story.

Discuss what the results were. What happened? Pick another person (or ask for a volunteer) to describe the outcome of the project. Do this in an objective way that avoids blame or judgment. Ask the group if they would like to add anything to complete this story.

WHAT WERE OUR GOALS FOR THIS PROJECT? WHAT DID WE THINK WOULD HAPPEN?	WHAT WERE THE RESULTS? WHAT DID HAPPEN?



WHAT WENT WELL? WHAT DID NOT?

As a group, make a list of everything that worked well and a separate list of what didn't. Dig into the "why" behind the group's answers.

WHAT WORKED WELL AND WHY?	WHAT DID NOT WORK WELL AND WHY?



IF WE WERE TO DO THIS PROJECT AGAIN, WHAT ACTIONS, STEPS OR PROCESSES WOULD WE WANT TO **KEEP DOING**?

Capture these ideas and determine the next steps. Avoid broad generalizations. Instead, use specific, actionable examples to leverage for future projects.

WHAT WORKED	WHY DID IT WORK	THINGS TO KEEP DOING	NEXT STEPS	OWNER



IF WE WERE TO DO THIS PROJECT AGAIN, WHAT ACTIONS, STEPS OR PROCESSES WOULD WE WANT TO **CHANGE**?

Capture these ideas and determine the next steps. Avoid broad generalizations. Instead, use specific, actionable examples to leverage for future projects.

WHAT DIDN'T WORK	WHY DIDN'T IT WORK	THINGS TO CHANGE	NEXT STEPS	OWNER

EXAMPLE SURVEY QUESTIONS TO SEND TO EXTENDED TEAM **PRIOR** TO POST-MORTEM REVIEW.

Here are some examples of questions you might want to send to the extended team who worked on the project. This gives you an opportunity to get feedback from more people, including those who will not be participating in the PPM review. It's best if you can provide an anonymous response option to allow more candid feedback. Tools like Survey Monkey are great for this purpose. Send the responses to the PPM review participants in advance of the meeting so they have an opportunity to process the feedback.

- What worked?
- What didn't?
- How effectively did we meet the project objective?
- Did we meet specified deadlines? Why or why not?
- How well did we stay within project budget?
- How effectively did we communicate as a team?
- How effectively did we communicate the project to others?
- Were the resources dedicated to the project appropriate, sufficient, and efficiently used?
- If we had to do this project again, what would we do differently?
- What is the biggest lesson learned from this project?