

# How to do capture and document Lessons Learned

## Guidance and Template

The formulation of lessons learned is the collection, validation, and documentation of experiences, developments, hints, shortcomings and risks found during a project or initiative. Drawing lessons learned makes sense at the end of any project, activity and work phase. Conducting lessons learned should be part of your project management routine because it allows your team to continuously learn from what you are doing, to be more productive, better focused and ultimately have more development impact.

### What are the benefits?

Collecting lessons learned from an ongoing or completed project and initiative

- Gives credit and visibility to the team for the efforts made;
- Provides useful guidance for the planning and implementation of similar initiatives in the future;
- Prevents the repetition of mistakes, and allows for scaling up successes;
- Contributes to learning, capacity building and operational efficiency of the organization.

### How to go about capturing Lessons Learned?

#### 1. Plan for a Lessons Learned Workshop as part of your project planning

It is recommended that the project team carries out a Lessons Learned Workshop (2-4 hours) at the end of the project, but before official project completion (in fact, a project cannot not be regarded as complete until a lessons learned has been conducted and a report has been submitted). Time and budget should be set aside for this exercise from the very beginning in the project plan. It is important to engage with team members while they are still actively involved in the project and while the team is still intact. Consider that for large, or lengthy multi-year projects you might want to collect lessons at the end of each major stage or year.

#### 2. Conduct the Lessons Learned Workshop

##### a. Define the ground rules:

- The objective of the workshop is to learn about what went well and what could have been done better;
- The purpose is not to look good in front of donors, but to help the organization (and other teams) to learn the experience and build on it;
- The workshop is not an opportunity to score personal points, pull rank or belittle subordinates.

##### b. Project Manager summarizes the overall project background so everyone (including anyone outside the team reading the final Lessons Learned report) is on the same page:

- Project Description: What was the project meant to achieve?
- Roles & Responsibilities: Who was involved and fulfilled which functions?
- Scope, Timing & Budget: How did the project implementation progress over time?

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- Results: What were the major results achieved?
- c. Work with the team through the following questions (using the template at the end of this paper):

*“If we could do it all over again, what would we repeat/do more of because it worked well, and what would we do differently/improve in these areas?”*

- Substantive project activities and outputs
- Operations, including
  - Project Management
  - Budgeting and management of Financial Resources
  - Management of Human Resources and Procurement
  - Time Management
- Communication and knowledge management
- Partnership management and client service

If you have already captured some lessons learned in the Corporate Planning System, it is now a good time to flag them for discussion within the team and review/validate them.

- d. Identify follow-up actions, target audience and who can be approached for details questions:

For each lesson

- Consider which actions should be taken in order to actively facilitate a change in UNDP practice (or in your concrete project) based on the lesson learned. Where possible (and in particular for lessons that still allow for adjustments in your own project) assign a person responsible for following up in this action;
- Consider which groups or individuals within or outside the organization would most benefit from this particular insight. Try to be as specific as possible, so that the lesson can reach the right audience;
- Identify who within the project team (including partners) can be approached in the future for detail questions on the lesson.

- e. Agree on a list of the top ten (or less) most important lessons:

Putting yourself into the shoes of someone who should benefit from these lessons (a future project manager, a partner, senior management, etc.), let the team vote on the ten most important lessons from the list you identified, and write them up as a top ten list.

### 3. Write up Lessons Learned Report and upload in Corporate Planning system

Using the template at the end of this paper, write up the information collected above and let the team review the draft report so they can make adjustments and additions as needed. Once the report is final, upload it on the Corporate Planning System, and share a link to the document as a status update in UNDP’s Yammer platform.

#### 4. Share your Lessons Learned widely

The lessons you captured are only useful to the extent that others know of them and apply them within their own work. It is therefore imperative that you allocate time and resources as part of the project closure to share the results of your lessons learned exercise as visibly and widely as possible. This should include a selection of the following activities:

- Summarizing the key elements of the lessons learned report in a nicely looking, reader-friendly Lessons Learned 2-pager for wider dissemination (with a specific target audience in mind)
- Sharing and opening up a discussion on your lessons in suitable thematic knowledge network;
- Conducting a brown bag lunch or lessons learned webinar presenting your project and your lessons learned (resist turning this into a PR activity, and instead focus on the lessons learned aspects, and the advice you can give to other teams and project managers);
- Writing a blog post reflecting on one or several of your key lessons and share it widely through the UNDP website blog or as guest post on external blogs or media outlets (World Bank blogs, The Guardian, etc.)
- Going on a lessons learned mission by bringing the project manager to a Regional Centre or headquarters where s/he can present the project results and lessons to different UNDP teams, partners and donors (again, resist turning this into a PR exercise);
- Sharing the lessons learned report widely via email with colleagues, project partners and suitable external audiences.

#### **Additional recommendations for conducting the Lessons Learned process:**

1. Collect as much information as possible prior to the lessons learned workshop. Report your findings at the meeting as you start each discussion topic.
2. If you capture lessons at a time that still allows for course correction in the current project, don't attempt to implement every possible improvement identified. Have the team vote on the top 4-5 opportunities and focus on them. You can choose to implement other improvements once those are completed.
3. Every new process you recommend introducing should result in the elimination of something old. Your objective is not to increase workload; it is to make work more streamlined and effective.
4. If possible, capture lessons learned ideas at any time throughout the project and enter them in the Corporate Planning System as you identify them. Start the conversation at the beginning of the project so the thought of continuous improvement is on the mind of all members, along with a practice to capture and document feedback.
5. Consider engaging an external knowledge management facilitator for your lessons learned workshop. Someone who is impartial and can create a free-speaking environment.

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**DATE:**

## TEMPLATE: LESSONS LEARNED REPORT

### 1. Project/Initiative Reviewed:

### 2. Date of Lessons Learned Workshop:

### 3. Meeting participants:

NAME	ROLE	CONTACT EMAIL
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

### 4. Brief project/initiative summary:

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### 5. Key successes and key shortcomings of the project/initiative:

Key successes	Key shortcomings

### 6. Summary of Top Ten Lessons Learned from this Project/Initiative

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

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**7. Lessons Learned from Substantive Project Activities and Outputs (please formulate full sentences in columns 3-5):**

Lesson #	Task/Activity/Output	What worked well and should be repeated or scaled up?	What didn't work and how could it be improved?	What immediate action should be taken?	Who has been tasked with this action?	Who should know about this lesson?	Who can be approached for details on this lesson?
1							
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**8. Lessons Learned on Operations, including Planning, Project Management, Budgeting, Management of Financial and Human Resources, Procurement, and Time Management (please formulate full sentences in columns 3-5):**

Lesson #	Task/Activity/Output	What worked well and should be repeated or scaled up?	What didn't work and how could it be improved?	What immediate action should be taken?	Who has been tasked with this action?	Who should know about this lesson?	Who can be approached for details on this lesson?
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**9. Lessons Learned on Communication and Knowledge Management (please formulate full sentences in columns 3-5):**

Lesson #	Task/Activity/Output	What worked well and should be repeated or scaled up?	What didn't work and how could it be improved?	What immediate action should be taken?	Who has been tasked with this action?	Who should know about this lesson?	Who can be approached for details on this lesson?
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**10. Lessons Learned on Partnership Management and Client Service (please formulate full sentences in columns 3-5):**

Lesson #	Task/Activity/Output	What worked well and should be repeated or scaled up?	What didn't work and how could it be improved?	What immediate action should be taken?	Who has been tasked with this action?	Who should know about this lesson?	Who can be approached for details on this lesson?
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