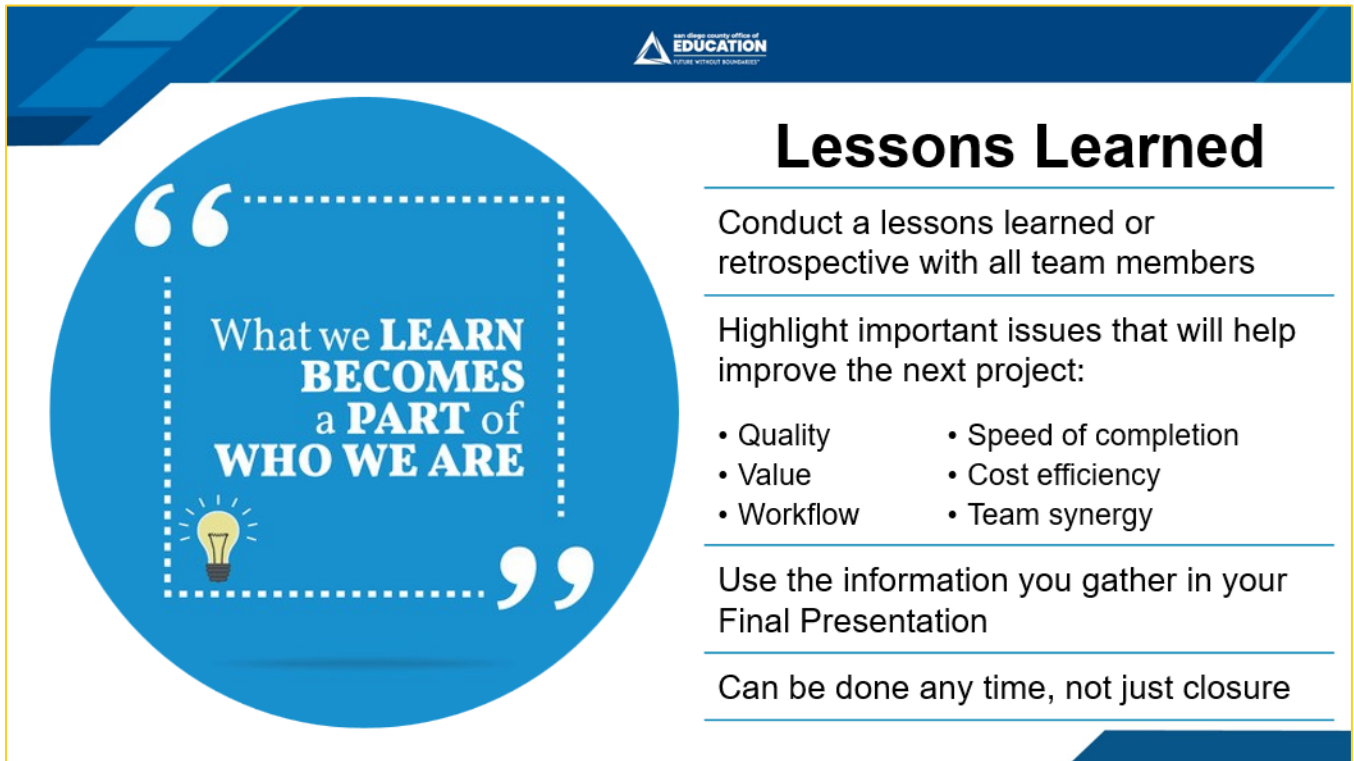


LESSONS LEARNED MEETING

A Lessons Learned meeting helps your team reflect on the project so you can improve future work. Discuss with the project team members the important issues that will help improve the quality, value, workflow, speed of completion, cost-efficiency, and team synergy of the next project.



The graphic features a blue circular callout on the left containing a quote and a lightbulb icon. To the right, the title 'Lessons Learned' is followed by three sections of text, each separated by a horizontal line.

Lessons Learned

Conduct a lessons learned or retrospective with all team members

Highlight important issues that will help improve the next project:

- Quality
- Value
- Workflow
- Speed of completion
- Cost efficiency
- Team synergy

Use the information you gather in your Final Presentation

Can be done any time, not just closure

THREE QUESTIONS TO ASK THE TEAM:

Q1

What worked well?

Q2

Where can we improve?

Q3

What are you most proud of as a result of this project?

(Something else you'd like to know)

How to Run a Lessons Learned Meeting

Before the Meeting

1. Set the tone. Let your team know the meeting is about team improvement and continuous learning.
2. Share the guiding questions ahead of time:
 - **What worked well?**
 - **Where can we improve?**
 - **What are you most proud of?**
(Or, ask something else you'd like to know. Example: **What did you learn?**)
3. Send a shared doc so people can prepare or type directly into it, or a survey form to collect information in advance.

During the Meeting

1. Remind the team this is about learning and solutions. Encourage full participation. Every perspective matters.
2. Facilitate using round-robin or open sharing. If it's help, model a response first before opening it up to others.
3. If possible, capture feedback live (whiteboard, chart paper, shared document, etc.).

After the Meeting

4. Summarize the discussion. Group the comments into themes, if any.
5. Include the highlights or themes in your final report.
6. Store the notes in a place where you can access them in the future. Use these insights to improve your next project.

NOTE: For longer projects that have multiple rollouts (Group 1, Group 2, Group 3, for example), consider doing a Lessons Learned after each group for continuous improvement DURING your project.

Sample Lessons Learned Document

COPY/PASTE INTO A WORD DOC (SHARED FILE)

Filename: Lessons Learned for [Project Name]

Lessons Learned for [Project Name]

Team Member Name: _____

Q1: What worked well?

- X
- X
- X

Q2: Where can we improve?

- X
- X
- X

Q3: What are you most proud of as a result of this project?

- X
- X
- X

Sample Lessons Learned Email / Calendar Invite

COPY/PASTE INTO COMMUNICATIONS TO THE PROJECT TEAM

From: Project Manager

To: Project Team

Subject: Help us reflect - Lessons Learned for [Project Name]

Hi [Insert Team Member Names],

As we wrap up the [Project Name], we're holding a short Lessons Learned meeting. Our goal is to understand what went well, what we can improve, and celebrate what we're proud of. To prepare, please take a few minutes to reflect on these three questions:

1. What worked well?
2. Where can we improve?
3. What are you most proud of?

Here's the Word doc where you can type your responses: [INSERT LINK HERE]

At the meeting we'll refer to the shared doc to discuss our responses. and capture takeaways that will help us for our future projects.

[Closing and Signature]

SERVICENOW EDUCATION FOR SDCOE EMPLOYEES PROJECT

Lessons Learned

ServiceNow Project Team (Peyri, Flora, Tyler, Candace)

Q1: What worked well?

- Reaching out to 16 Admin Assistants and getting feedback drove the content – pain points, suggestions
- Leadership was receptive to the recommended changes and took immediate action
- Partnership between EPMO and CSS
- Working with Stacy Brandt (Communications) for effective and timely communications
- Successful training meeting with 61 participants
- Successful COMET meeting
- Deliverables are clear, helpful, and easy to share/pass to new employees
- The request for a quarterly focus group meeting was one of the unexpected outcomes and a great idea

Q2: Where can we improve?

- Barely anything – this was a very smooth project
- Idea for improvement:
 - Improve the timing of any changes to ServiceNow so they don't occur on the same day as the training

Q3: What are you most proud of as a result of this project?

- The reception of the information, deliverables – high engagement, impactful
- Positive feedback from ITS senior leadership
- Quality materials
- We got a lot done in a short amount of time
- Everything was on track
- The racecar article in the May Inspire newsletter
- Used data to inform the project
- We truly listened to our customers