

Companion Guide: Lessons Learned and Knowledge Transfer

Why It Matters

Capturing lessons learned is a core leadership responsibility at the end of any project. It's not just a debrief—it's your chance to:

- Reflect on what worked and what didn't
- Improve future project delivery
- Share knowledge across teams
- Build a culture of continuous learning

When to Hold the Session

Timing: Within 1–2 weeks of project completion

Duration: 60–90 minutes

Participants: Full project team + key stakeholders

Environment: Safe, open, non-blaming

Objectives of a Lessons Learned Session

- Identify key successes and enablers
- Analyze major challenges or roadblocks
- Capture improvements for future projects
- Create a record for organizational learning
- Update templates or tools if applicable

What to Ask During the Session

Use open-ended, reflective prompts to generate discussion:

Core Prompts:

- What should we start doing?
- What should we stop doing?
- What should we continue doing?
- What surprised us?
- What advice would we give to the next team?

Optional Follow-Ups:

- What tools or processes helped the most?

- Where did communication break down?
- Which risks materialized—and how were they handled?

How to Capture the Insights

- Appoint a note-taker or use a shared document
- Group insights into clear categories:
 - Planning
 - Communication
 - Stakeholder engagement
 - Execution & delivery
 - Risk & issue handling
- Use short, clear language
- Prioritize actionable takeaways

Pro Tip: Keep the document to 1–2 pages. Focus on clarity, not volume.

Sharing and Knowledge Transfer

Don't let lessons disappear in someone's inbox. Make them accessible:

- Upload to your project repository, PMO, or team wiki
- Present findings at a team or department meeting
- Share with future project leads
- Submit any new tools, checklists, or templates for reuse

Tools That Can Help

- Visual Collaboration: Miro, MURAL, Jamboard
- Live Input: Google Docs, shared Notion pages
- Anonymous Feedback: MS Forms, Slido
- Theme Grouping: Sticky notes, Kanban-style boards

Optional Format: Plus/Delta

Plus (What Went Well)

Delta (What to Improve)

Clear roles at kickoff

Late stakeholder feedback

Daily stand-ups worked

Testing lacked structure

Good vendor coordination

Need better risk tracking

Tips for a Strong Session

- Appoint a neutral facilitator if needed
- Use a timeline review to trigger memories
- Emphasize participation from all roles
- Create an atmosphere of trust and improvement, not blame
- Clarify how the insights will be used

Your Leadership Role

Closing a project with care shows leadership maturity.

By documenting and sharing what you've learned, you:

- Enable better future outcomes
- Prevent repeated mistakes
- Strengthen your project management culture
- Demonstrate commitment to improvement

“Leaders who share lessons don’t just finish projects—they build momentum for the next one.”