

## Lessons Learned Meeting

### Source

Email is based on ACMP® Standard for Change Management© - First Edition §5.5.2 Design and Conduct Lessons Learned Evaluation and Provide Results to Establish Internal Best Practices.

The content in this document should be modified to fit your specific situation.

### Purpose

To evaluate the success or adoption outcomes of the Change Management Program, document what went well, record learnings, and share improvements for future change management programs with other change management practitioners or organizations.

### Responsibility

Change Management Lead in concert with the project manager (when possible).

### Participants

Team members, key stakeholders, the project sponsor, leadership, affected staff/customers, and other appropriate parties

### Notes

Lessons Learned Meeting results can be used to help the Change Management practitioner Assess Organizational Capacity for Change (ACMP Standard, Process 5.1.11) on future change management programs.

*“Audit lessons learned and change, project, and portfolio reports to gauge an organization’s current and planned changes and past record of adopting changes of similar magnitude”*

### Legal Acknowledgement

jTask acknowledges the Association for Change Management Professionals® (ACMP®) Standard for Change Management©, hereinafter referred to as “the ACMP Standard”, as being the basis for developing this email template

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### Overview

1. Email Participants to prepare them for the Lessons Learned Meeting.
2. Run Lessons Learned Meeting.
3. Compile Lessons Learned Meeting results and circulate to Participants.

## Steps

### 1. Email Participants to prepare them for the Lessons Learned Meeting

Email: Lessons Learned Meeting Template

Hi [Participant],

You will receive a calendar invite to a Lessons Learned meeting.

The purpose of the meeting is to

- Review the change management objectives
- Review each phase and its key objectives
- Review the effectiveness of each change management workstream against its key objectives and defined outcomes
- Review the effectiveness of the approach and ways of working
- Verify that the change management goals of the initiative were reached and validate key change actions for future projects
- Identify good outcomes and points for improvement, including any possible mitigation or improvement based on the current initiative
- Review change management activities and documents for other best practices or future improvements
- Determine which designs, strategies, and lessons learned will contribute to internal best practices going forward
- Update the knowledge management database or common document storage

In preparation for the meeting, please list and rank at least five answers to the following questions. Add additional rows as needed.

Rank	What are repeatable, successful activities?

Rank	How can we ensure future projects go as well or better?

Rank	What advice would you give to future teams?

Rank	What are some individual successes?

Please do not discuss or try to socialize your ideas before the meeting with other Participants so that your ideas won't influence other meeting attendees.

Please email me your input before the meeting and be prepared to discuss the details at the Lessons Learned meeting.

Yours truly, [Change Management Lead]

## **2. Run Lessons Learned Meeting**

### **Review Meeting Objective:**

Review Participant feedback, discuss, prioritize, and suggest recommendations for future change management programs. Develop and categorize a complete set of Lessons Learned for distribution to Participants.

### **Meeting Rules and Guidelines:**

- Review meeting start and finish times.
- Each participant will be allowed to share their question answers with no interruptions from other team members.
- The suggested sequence of speaking is junior to senior. This sequence is recommended to ensure that a leader's ideas do not influence participants.
- Do not criticize or attempt to change someone's mind. All ideas presented should be respected.
- After a Participant has shared their answers, open the meeting up for general discussion.
- In the prioritization phase, it is a team process to rank what are the most important lessons for the business to learn.

## **3. Compile Lessons Learned Meeting results and circulate to Participants.**

The Lessons Learned Meeting is critical for continuous business improvement and future cycle time reductions.

After the meeting, the Change Management Lead documents the top five answers to the questions in order of importance or an agreed number of items. Then sends them to the participants with any recommendations and saves the file on the organizations file server .

**jTask, Inc.**  
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