

Lucid Facilitator's Guide

A FRAMEWORK FOR SUCCESSFUL PROJECT RETROSPECTIVES

This meeting framework helps teams **learn from project successes and failures** together, and **commit to change** based on what they learned.

Use this template as a starting place when designing your next project retrospective, and adapt the agenda to fit your team.

Best For



Learning from completed projects

15 or fewer people

Projects lasting one year or less

Contents

Introduction.....	2
Key Concepts.....	3
Agenda.....	4
Step-by-Step Instructions.....	5
Questions for Retrospectives.....	13
Resources for Achieving Meeting Mastery	15
About the Author.....	16



INTRODUCTION

Your team just completed a project. Some things went exactly as planned, some went better than you'd hoped. Other moments weren't so great. Now that the experience is behind you, it's time to reflect, then take what you've learned into improving your approach to the next project.

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

-John Dewey

The **project retrospective is a core practice** for every team that seeks to learn from experience and master their craft.

During this meeting, your team will:

- Review what happened during the project
- Discuss what worked well and what didn't
- Commit to making changes that will improve the next project

This template provides a **simple framework** for leading a project retrospective. The online template shows one way of running the meeting. **This guide includes several options for leading the discussion** and links to additional resources.

Regardless of the techniques you choose, the end result should be the same. **At the end of the meeting, the team leaves with a specific list of actions they'll take to ensure the lessons learned aren't lost.**

Key Concepts

Plan enough time.

Each meeting needs AT LEAST 1 hour. Many experts suggest scheduling 45 minutes of reflection time per week of project work.

You can keep the full project retrospective shorter by running smaller retrospectives more often. As an example, our team once managed projects that lasted 4 to 9 months. We ran shorter retrospectives after every major milestone, then one big “Project Wrap” at the end. The final Project Wrap typically lasted 1.5 to 3 hours, after which we all went for nachos and beer.

Retrospectives are a practice.

These meetings run better and get better results after you’ve had a few. Practice helps the team prepare more easily, and to reach better agreements faster. Teams become even more successful when they see real change as a result, because they know the time spent in the retrospective will make their work better in the long run.

Preparation is required.

You’re asking the team to reflect on their experience, pull out key learnings, and turn that into meaningful change. If you rush it, you’ll get whatever comes to mind in the moment, which will usually say more about how their current project is going than what happened in the last one.

Don’t wing it. Have a plan, and make it easy for the team to come prepared.

Don’t try to change everything at once.

At the end of the meeting, you want to walk out with a commitment to concrete actions. That said, if people see that these meetings generate all kinds of ideas but nothing real ever comes of it, they’ll stop participating.

For a meaningful result, **make sure the action plans coming out of your meeting are realistic**, and that the people responsible for the changes can actually carry them out.

AGENDA

GOAL

Review the project and identify key learnings that we can use to improve how we work going forward.

DURATION

1 to 3+ hours, depending on team size and project duration

- ① **Welcome**
- ② **Project Review**
- ③ **What did we learn?**
 - Successes
 - Challenges
 - Other Insights
- ④ **Priorities: What matters most?**
- ⑤ **Changes to Make: Action Planning**
- ⑥ **Closing & Evaluation**

STEP-BY-STEP INSTRUCTIONS

Before the meeting

Identify your audience. To whom will you “hand off” the results of this meeting? Is this to help your team improve an internal process, for a team inheriting your project, or for the department or company as a whole?

Assemble a project timeline, showing major events and milestones. Also, review the original project definition, success criteria and any metrics you have regarding the project’s outcome.

Refine the agenda. Decide how you want to run the different parts of the meeting and update the agenda accordingly. If this is your first retrospective, we recommend sticking with the simple format outlined in the online agenda.

Schedule the meeting at least 3 days in advance.

Invite the team. Ask them to come prepared with their key insights, observations, and ideas for improvement.

Get supplies. Several retrospective techniques require additional supplies, such as sticky notes or online voting systems. In-person meetings benefit from snacks!



During the meeting

1

Welcome

This agenda item gives everyone a chance to get online before you begin. While we recommend against waiting for latecomers (don't punish the punctual!), you should allow a few moments for anyone fumbling with audio or their Internet connections to join. Once everyone's ready, welcome them and get started.

Begin by going over:

- the meeting goal,
- the results you expect to see at the end of the meeting,
- and the process you'll use to get there.

When you're ready, **click "Next >"** to get started with the project review.

2

Project Review

Next, **make sure everyone has a shared view on the project.** In order to come up with useful ideas that everyone can agree on, the team needs a shared understanding of the facts and insight into the parts of the project in which they may not have been involved.

Do not skip or rush through this step. People will arrive at the retrospective ready to discuss and solve problems, often assuming they know everything they need to know about what happened. This is rarely true.

If you are reviewing a project as a team, that means it took many people with unique experiences to get to that point. **This step ensures everyone gets all the facts straight before they try to solve problems they may only partially understand.**

We've listed 3 ways you can run this part of the meeting on the next page.

After you complete the project review, **click "Next >"** to begin sharing insights.

3 Options for Leading the Project Review

<p>1</p>	<p>Ask the Group</p> <p>For shorter projects or for mid-project retrospectives, you can ask the group to discuss the facts.</p> <p>Questions to ask:</p> <ul style="list-style-type: none">What was supposed to happen?What actually happened? <p>or</p> <ul style="list-style-type: none">What did you set out to achieve?What was your plan to achieve this?How did this change as you progressed?
<p>2</p>	<p>Share a Project Report</p> <p>The project leader presents a project report, and the team comments on their experiences during the presentation.</p> <p>A report is best for online meetings and smaller projects where most of the team was involved throughout the whole process.</p> <p>If you choose this option, keep it short.</p>
<p>3</p>	<p>Create a Shared Timeline</p> <p>The leader posts the key project dates and milestones. Then, the team works as a group to create a visual timeline of the project, with each person filling in details along the way.</p> <p>This approach takes longer, but makes for a better conversation, a stronger shared experience, and it's more fun!</p> <p>Example: the "Peaks and Valleys" technique can be used by groups meeting in-person to create a shared timeline of the project that highlights good and bad experiences.</p>

3

What did we learn?



This is the heart of the meeting.

From this point on, your team will discuss what they learned during the project. Together, you'll then identify the top insights and assign specific action items to ensure these lessons result in meaningful change.

The Lucid Meetings template agenda includes a very basic approach to this discussion. We ask three simple questions:

- Successes: What worked well?
- Challenges: Where did we run into challenges?
- Other Insights

Choose your questions in advance. The specific questions you ask will have a big impact on your results. For more options, **see our guide to [Questions for Retrospectives](#)** on page 13.

The online Lucid Meetings template includes these questions.

3.1 Successes

“What worked really well during this project?”

What should we make sure we do again in the future?”

3.2 Challenges

“Where did we run into challenges?”

3.3 Other Insights

“Where did we get lucky?”

What was unexpected?

Who helped you on this project?”

3 Options for Gathering Insights

1	<p>Just talk.</p> <p>Some teams find it works best for them if the leader reads each question, then the group just talks about it.</p> <p>This option is the least structured approach, which can result in a very free and engaging conversation. However, if your group includes people who are reluctant to speak up, people who tend to dominate the discussion, or more than 5 people, this option tends to limit the number of ideas discussed and reduce your chance of getting quality contributions from multiple perspectives.</p>
2	<p>Use the KJ Technique.</p> <p>This is how many agile teams run their retrospectives. It's fast, interactive, and engaging. This approach requires sticky notes and markers if you are meeting in person, or specialized software if you are meeting online.</p> <p>Read about the technique.</p> <p>Find ways to run the technique online.</p>
3	<p>Brainstorm silently then talk.</p> <p>This process balances structure with open conversation. It's designed to help people contribute their best ideas, and to ensure every participant has an equal opportunity to share.</p> <p>This is the option used in the online Lucid Meetings template.</p> <p>First, ask people to brainstorm individually. Allow 3 minutes of silent brainstorming per question. This time for silent reflection gets the most creative results.</p> <p>Then, share and discuss the responses.</p>

Tips for Sharing Ideas

- **Put each idea into a separate note.**
This makes each idea easier to rank and update later.
- **Write each idea as a complete sentence.**
Do not just write phrases that answer the questions. When you look at all the ideas together, full sentences will make it easy to see which insights relate to each question.
- **Use a Go-Around for sharing.**
Ask each person to share one idea at a time. Go around the group, asking for one idea from each person, then go around again until all ideas have been shared.
- **Combine similar ideas.**
It's OK to change and combine notes when two people have similar ideas. If you're using sticky notes, it's OK to stack duplicate ideas together. When someone hears an idea that they had too, they should speak up and add their duplicate note right then.
- **Identify themes.**
Notice related ideas and work together to pull out the common themes. For example, a problem with unclear requirements, a missed deadline, and an unhappy customer can all be related to a step in the contract process that needs improvement.



Identifying themes is the “grouping” step in the KJ Method

4

Prioritize: What matters most?

You should now be looking at a big list of both successes and challenges. As a group, **pick the top 3 to 5 ideas** (or themes) that you want to discuss as a team.

Using Lucid, you'll see all the notes automatically, and can tag the key ideas as a "Priority". If you are meeting in person, circle or highlight the key ideas.

Spend no more than 5 minutes picking your top ideas. You need plenty of time for the next topic.

5

Changes to make: Action Planning

Discuss the priority ideas. Ask:

“Given these priorities, what should we change for future projects?”

And, what can we do after this meeting to make sure this change happens?”

Try to get specific, and create clear action items that people in the meeting can complete. These might include tasks like:

- Updating project templates or processes
- Providing a report or training for other teams
- A change to an existing project underway
- Improved use of technology
- Adding or removing a vendor from future projects

When you're done discussing priorities and adding action items, **click "Next >"** to close out the meeting.

6

Closing and Evaluation

End the meeting by first asking if anyone has anything else they need to say. Then, review the action plan to make sure every task is clearly understood and has an appropriate owner and due date.

Next, take a moment to thank the group, and for the group to acknowledge each other's contributions.

Finally, ask everyone to take a moment and review the meeting. If you want feedback, you must ask for it specifically.

If you use Lucid Meetings, you can say:

“There are a lot of ways to run this kind of meeting, and we all want to make sure this is a good use of our time. Before you leave, please quickly rate this meeting and provide some feedback on the form you'll see once the meeting ends.”



After the meeting

Send out the follow-up email, which makes sure everyone gets their action items and a full report in their email, even if they couldn't attend the meeting.

QUESTIONS FOR RETROSPECTIVES

The questions you ask change the answers you receive. Here are a selection of questions others have used successfully to shape the conversation in their retrospectives.

Questions About the Project in General

- Are you proud of our finished work? If yes, what made it great? If no, what was wrong or missing?
- Did we get the results we wanted and did it make an impact?
- Which tools or techniques proved to be useful? Which not?
- What did you learn about working with this client?
- What important decisions were made during this project?
- What compromises were made? (Things that might look like a mistake but were done for a reason.)

Questions About What Worked

- What was the most gratifying or professionally satisfying part of the project?
- What did we do well, that if we don't discuss we might forget?
- What helps us to be successful as a team?
- Which of our methods or processes worked particularly well?
- Where did we get lucky? What can we do to ensure we succeed if we aren't so lucky next time?



Questions About Challenges

- What was the biggest impediment?
- Which of our methods or processes were difficult or frustrating to use?
- What was painful but necessary?
- What's still keeping you awake at night? What did we leave unresolved?
- What still puzzles us?

Questions About Take-Aways

- What advice would you give yourself if you were to go back to the start of the project?
- What should we have learned from this project a year from now?
- Are there any lessons for you personally?
- What else could we do better next time?

Question Sets

Use columns or a grid to organize answers in categories.

- [Liked, Learned, Lacked, and Longed For](#)
- [Drop, Add, Keep, and Improve](#)
- [Stop, Start, and Continue](#)
- [Enjoyable, Frustrating, Puzzling](#)



RESOURCES FOR ACHIEVING MEETING MASTERY

There are SO Many good resources for learning about retrospectives. Many come from the Agile software development community, but the practices apply no matter what kind of project you run. These are just a few of our favorites.



Websites and Applications

Fun Retrospectives

<http://www.funretrospectives.com/>

Retrium: Dedicated software and great resources for running online agile retrospectives

<https://retrium.com/>

Retrospective Questions Blog posts

<https://www.portent.com/blog/10-tips-for-a-successful-post-mortem.htm>

<http://www.alexanderinteractive.com/blog/2012/09/redefining-the-post-mortem-meeting/>

http://betterevaluation.org/evaluation-options/after_action_review

<http://www.benlinders.com/2013/which-questions-do-you-ask-in-retrospectives/>

Other search keywords to explore

Project postmortem, project retrospective, project wrap up, after-action planning



Books

Esther Derby and Diana Larsen , “Agile Retrospectives: Making Good Teams Great” 2006

<http://smile.amazon.com/Agile-Retrospectives-Making-Teams-Great/dp/0977616649>

James Shore, “The Art of Agile”, 2007

<http://www.jamesshore.com/Agile-Book/retrospectives.html>

ABOUT THE AUTHOR

This template was designed and produced by the team at Lucid Meetings.



Learn more about us [on our website](#).

**Provided under Creative Commons Attribution-ShareAlike
4.0 International License**

<http://creativecommons.org/licenses/by-sa/4.0/>

