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Program and Project Retrospectives: An Introduction
(Part 1 of a Series)

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Many organizations are looking for better ways to improve their current program and project management practices year over year. At Intel, we have historically utilized post-mortems or post-project audits as the established means for capturing our key learnings. However, these methods have gained a negative connotation within the company, and are sometimes viewed as a necessary evil that must be completed before closing out one program or project and moving on to the next. Today, we are rapidly moving away from the post-project audit and post-mortem methods of collecting our key learnings, and are moving to a more effective method known as retrospectives.

The intent of this first paper in our series on retrospectives is to establish the foundation for the retrospective methodology and why we are utilizing it at Intel. We explain what the retrospective methodology is, how is it different from post-mortems and post-project audits, and the benefits we've realized through the implementation of utilizing this method for improving our program and project management practices at Intel.

What is a retrospective?

Sometimes the best way to describe a new concept is to describe what it is **NOT**. A retrospective is *not* a one-time event that happens at the end of a program or project. It is *not* a bulleted list of statements that the team creates and never looks at again, and it is *not* an exercise to point fingers or to place blame. Rather, it is a "ritual" where the team members who have a perspective to share meet at strategic points during the program or project lifecycle to discuss what is working and what needs to be improved. The intent is to capture key lessons while a program or project is in-flight, and apply improvements during the remainder of the lifecycle. The focus is on learning, not on finger-pointing or blaming.

So how is the retrospective method different from post-mortems and post-project audits? A post-mortem, as it is defined, is "*an analysis carried out shortly after the conclusion of an event, especially an unsuccessful one*" (Encarta Dictionary: English, online version). In many companies, a post-mortem is a *post project audit meeting* held following the conclusion or cancellation of a project that is typically led by the program or project manager. Unfortunately, this meeting occurs at the end of the lifecycle, therefore too late to implement corrections on the program or project that is in-flight. At best, learnings can be applied to the next program or project. In our experience, the post-mortem is many times held as an after thought without a defined, objective process and does not lead to actionable change to program or project team practices. Often team members don't want to attend due to bad experiences in the past where the

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process became personal and non-productive. Alternatively, they have shared their perspective and provided detailed recommendations, and never saw any measurable change.

When applied most effectively, a trained, objective facilitator guides the team through an analysis of what is working well and what isn't, and then helps the program or project team generate ideas for improvement and what they want to do differently. To apply the learnings, the facilitator then works with the team to create actionable plans to improve both effectiveness and efficiency. Learnings are applied and behaviors are changed through the continuous monitoring and tracking of action plan implementation and communication of progress to senior stakeholders within the organization.

The role of the facilitator is a very important distinction between a retrospective and other program and project review practices. Facilitating an effective retrospective takes a special talent and a specific skill set. One of the most important benefits of utilizing the retrospective methodology is the focus on drawing people out to participate and share their perspectives. This is done by identifying the right activities to draw out root cause and guide the team into discussions around how they can solve the problem, what is the impact of fixing the problem, who needs to support the solution, who or what could get in the way, and assigns an owner with due dates for next steps.

The level of success of the improvement efforts directly relates to the effectiveness of the facilitator. The facilitator plays a significant role in the retrospective, this includes managing the following activities in combination with the sponsor:

- Define the objectives of the retrospective
- Identify the retrospective attendees
- Create a retrospective survey (optional)
 - Gather and analyze the survey data for themes
- Design and deliver an effective retrospective meeting (face-to-face or virtual)
- Develop action plans to improve the issues identified
- Participate in a management summary report out
- Share good practices across the organization

Where most process improvement efforts fail and fall apart is after the meeting. Team members are excited about the possibility of a better future, so tracking and managing the action plans created in the retrospective is imperative to the desired behavior change.

Why Retrospectives?

If your organization is like ours, you are continually looking for better ways to increase the effectiveness of your program and project teams. However, such process and practice improvement efforts are always a challenge, especially if you are tasked to review all activities required to deliver finished products, out-of-box solutions, or a combination of both products and

services. The challenge is compounded when dealing with geographically dispersed teams, cultural differences, and disparate time zones with few overlapping work hours. At Intel, very few development teams are located in the same state or country, much less in the same building. We have teams spread across approximately 290 locations in 45 countries and have found that post-project audits are ineffective with highly distributed teams. Retrospectives on the other hand are quite effective because of the trained facilitator who is an expert in extracting the key issues and learnings from our diverse and distributed workforce.

Other important reasons for why we are utilizing the retrospective methodology include the following:

- Many times teams focus only on the negative aspects of their performance and forget the positive. Retrospectives also explore what is working well on a program or project, and ensures the practices are reinforced and repeated.
- We have found that retrospectives allow us to make positive changes to program or projects that are currently in-flight, therefore we don't have to wait twelve to twenty-four months to realized the benefits of our learnings.
- Our teams learn best when they solve immediate problems. As part of the retrospective method, we focus on the critical but few opportunities to improve, and develop specific action plans to drive changes in our practices. Theses action plans are owned by various members of the program or project team who drive them to implementation.

Benefits of utilizing the retrospective method

One of the most common questions we get is “*what are the benefits you have gained from using the retrospective methodology*”? Although we've found the benefits to be many for Intel, the greatest benefits can be summarized as follows:

- The ability to break the repetition cycle of ineffective program and project management practices
- The opportunity to solve immediate problems through rapid application of key learnings
- An increased probability of affecting sustainable behavior changes
- Improved efficiency and results through the use of a trained facilitator

Since retrospectives are conducted at multiple points along the lifecycle of a program or project, members of the team have an opportunity to change poor practices or reinforce good practices on the current program. Most teams wait until the end of the program or project to focus on what needs to be done differently. However, on a twelve to twenty four month project, many of the key learnings are lost if a team only performs a post-project audit. In some cases, changes aren't implemented for up to two years due to the lag in collecting the information.

Retrospectives give our teams and their organizations the opportunity to solve immediate problems. Teams and organizations learn best when they solve problems and focus on incremental changes in behavior and practices. Additionally, when discussing issues and problems that relate directly to their productivity, and center on the topics from their own experiences, teams feel self-directed and a higher level of buy-in for change is achieved. With greater buy-in from the people performing the work, a higher probability of achieving sustainable and permanent change occurs.

Conclusion

Retrospectives are a series of events where team members who have a perspective to share meet at strategic points during the program or project lifecycle to discuss what is working and what needs to be improved. The intent is to capture key lessons while a program or project is in-flight, and apply improvements during the remainder of the lifecycle.

Because of the growing complexity of our product and service development processes at Intel, as well as the increase in global dispersion of our teams, we needed to find a more effective approach for collecting key learnings over the conventional post-mortem or post-project audit approaches.

We found that retrospectives are a much more effective approach for helping our program and project managers increase the effectiveness of their teams and instituting lasting change into our business groups. This is accomplished through:

- Sharing perspectives to understand what worked well in the program or project so they can reinforce it
- Identifying opportunities for improvement and lessons learned so they can improve the current and subsequent practices
- Making specific recommendations for changes
- Discussing what the team wants to do differently
- Helping the team see ways to work together more efficiently

In the next paper in this series we will describe what it takes to gain organizational buy-in for retrospectives, and provide a recommended process for introducing the method into an organization. Examples from our experience in moving organizations within Intel to the retrospective methodology will be presented.

For more information on retrospectives for your organization, go to info@programmanagement-academy.com.



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