

How to Optimise Learning from Projects

Specialist, distinctive knowledge embodied in project teams and their experience is valuable and can drive superior organisational outcomes.

However, there are clear knowledge-based risks in large projects reflecting the episodic work and the movement of staff to and from the project. Specifically, these risks are:

- ❑ Not learning from the experience base of individuals and teams
- ❑ Not learning from the organisation's own project experience
- ❑ Knowledge loss between project phases (at *handover*). Staff typically identify the transition between project phases as their most severe knowledge risk.

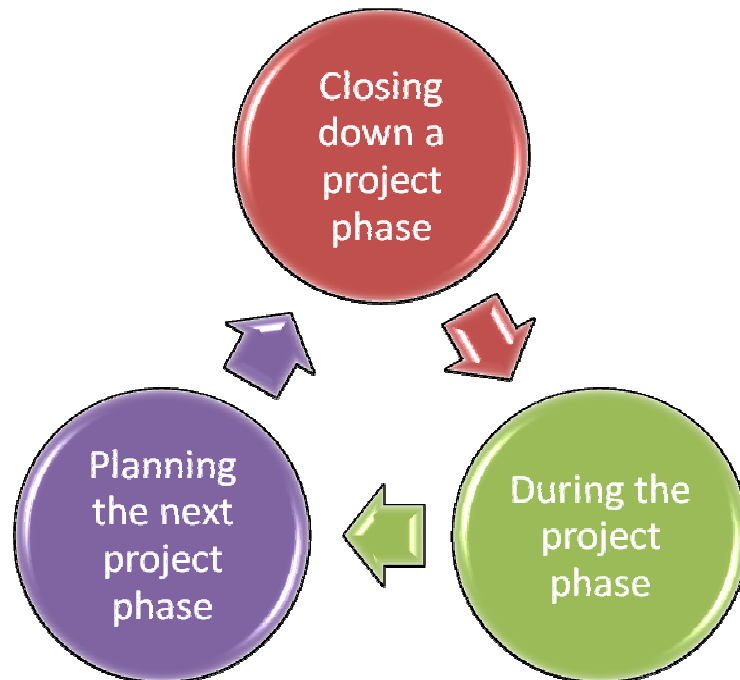
Processes to promote learning complement existing project management processes by focusing explicitly on developing intellectual capital or knowledge assets. The strategy will enable organisations and teams to leverage and sustain the skills and experiences of people, and reduce risk associated with the loss of important knowledge and capability.

Strategy

To capture the benefits of skilled people and their rich experiences, and reduce the risks of knowledge loss, key actions are required at project milestones. The critical knowledge risk milestones (*knowledge risk pivot points*) are shown in Figure 1:

- ❑ Planning the next project phase
- ❑ Closing down a project phase
- ❑ During the project phase

Figure 1: Knowledge Risk Pivot Points



The activities complement current project management process with a specific focus on intellectual capital or knowledge assets. The purpose of each activity therefore is to:

- Leverage and sustain the organisation's existing knowledge base, and
- Minimise potential knowledge loss.

In the next section, actions to leverage experience and mitigate risk are identified for the three project management phases.

Planning the New Project Phase

The **Project Management Group** or equivalent should meet to consider these knowledge issues:

- ❑ What has the team learned elsewhere that will be useful for planning this project phase?
- ❑ How will our working relationships change in the new project phase?
- ❑ What is the critical knowledge from the current phase that we must carry forward to the next phase?
- ❑ Which staff will not transition to the next phase? What project-specific knowledge and capability do they have? How will we capture and or share what they know?
- ❑ What documents and information resources must be preserved from the current project phase? Are the records accurate and complete?

An **all staff meeting** should also take place to communicate plans and roles for the new project phase:

- ❑ Present existing plans to staff
- ❑ What have we missed in our planning for this phase?
- ❑ How will roles, relationships and working arrangements change as we move the new phase?

Project Manager. Planning for the new project phase will trigger a review of Organisation Structure and Staffing Requirements.

- ❑ Departing staff. Review position descriptions for departing staff. What knowledge and capabilities are being lost to the project? Which duties and responsibilities will continue, and how will these be resourced?
- ❑ New roles. Develop position descriptions for new roles specifying capabilities and knowledge sets required for the next project phase
- ❑ Continuing staff. Review position descriptions for continuing staff. and change according to what new capabilities and knowledge will be required
- ❑ Duties
- ❑ Relationships
- ❑ Special knowledge required

Closing Down the Current Project Phase

Again the focus of activities is to leverage and sustain knowledge assets and minimise loss of important organisational knowledge.

All staff meeting to identify key lessons

- ❑ Identify key documents and artifacts and where these are stored. What changes need to be made to key documents to bring them up to date?
- ❑ Names and details of key contacts and issues where they helped
- ❑ What do you wish you had known earlier?
- ❑ Major project phases and insights developed at each phase

Exit procedure for departing staff:

- ❑ Paper and electronic records: where should these be stored?
- ❑ What issues from your work are unresolved, and who should take these forward?
- ❑ Thinking of your time here, what should the people working on the next phase of the project know, that they may not know?

Learning During the Project Phase

Finally, there is the opportunity to maximise learning that occurs during the project phase itself.

Induct new starters to accelerate knowledge transfer and capability development:

- ❑ Provide start up kit with delegations, reporting relationships and base information – the minimum that we expect *everyone* to know about the organisation and the project
- ❑ Introduce the new starter to roles and specialist knowledge across the business and its operations
- ❑ Discuss how the role interacts with and supports others
- ❑ Publish relevant previous experience of the new starter across the organisation to facilitate knowledge sharing and access to specialist expertise

Conduct learning based project reviews (LBPRs). LBPRs perform a dual function, acting as both a traditional *status and control* review and an improvement tool. They provide real time, routine opportunities to create, capture, share and apply knowledge throughout a project lifecycle.

- Status meetings can fulfill four purposes, ranging from the immediate and operational to the long-term and strategic. These are:
 1. Sharing facts
 2. Adjusting project actions
 3. Learning that improves current project's practices
 4. Learning that improves the organisation's core practices, processes, capabilities and tools (builds capabilities for future projects)

- To leverage learning from status meetings, organisations should include **items 3 & 4** as standing items on project meeting agendas. The same issues could be canvassed at Risk Management meetings / technical review meetings or equivalents as well.