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This is the header slide to show whilst everyone arrives.

***Equipment Checklist before you start:***

- 6-10 x packs of large post-it notes
- Pens – dry and flip chart markers
- Digital Camera to take pictures of the flip charts and other display output from the session.
- Clock.
- Flip chart, whiteboard or ‘magic whiteboard’ sheets for Step 2 exercise. It can help to set up a large area of wall or flip chart/whiteboard sheets labeled ‘Before’, ‘During’ and ‘After’ with ‘Positive’ and ‘Negative’ rows labeled beneath. Eg,

|          | Before | During | After |
|----------|--------|--------|-------|
| Positive |        |        |       |
| Negative |        |        |       |

## Workshop Overview

|      |  |
|------|--|
| 0:00 | Introduction to Session, Objectives & Format                   |
|      | Review of initial project objectives (& benefits plan)         |
|      | Analysis of 'pre', 'during' and 'post' project activity        |
| 1:15 | Break  |
| 1:30 | Analysis of 'Expected & unexpected' benefits                   |
|      | Team work review   |
|      | How best to share the learning?                                |
| 2:45 | Finalise output from the review, and actions for communication |
| 3:00 | Session Close  |



### **Adjust the timings to match your actual schedule:**

These timings give an indication of how long to devote to each activity, although you may need to adjust depending on the level of debate.

### **Introductions:**

Make sure everyone knows each other.

If you have invited users or others who haven't regularly been involved with the core project team, make sure everyone introduces themselves. Don't assume familiarity!

## Objectives of the Review

- To identify and **understand the reasons for success** arising from this project, both **planned and unexpected**;
- To identify and understand the **reasons why some aspects of the project didn't go according to plan**, especially where there were **negative outcomes**;
- To agree on and **record the most important lessons** learned;
- To agree **actions for sharing the lessons learned** - amongst this project team and for the future benefit of others running similar projects.



**Present the core objectives of the session.**

***Ask the group to spend 5 minutes discussing 'what will help us to get the most from this session?'***

***If it's a larger group (over 8 people), ask them to discuss this in pairs or trios.***

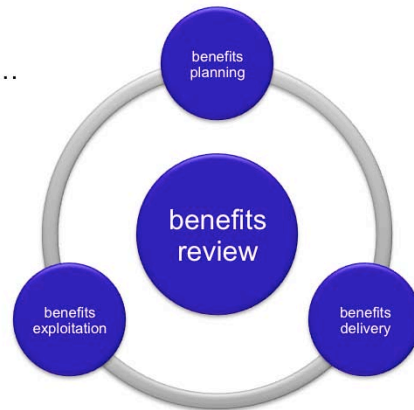
**Draw out the key points in a whole group review**, write up the key points on a flip chart (you could ask someone from within the group to scribe for you so that you can concentrate on the discussion).

This gives you something to refer back to if you need to remind people about conduct. Some tips for things to include/suggest here are:

- Timekeeping – stating that you will make requests to keep to agreed time – or re-negotiate if a point requires further debate
- Asking for one person to speak at a time
- Stating that, as facilitator, you will pause discussions that may stray away from the core agenda with the intent of re-focusing
- Encourage people to be creative in thought and ideas, and to have fun!
- Ask for examples, not hearsay or generalisations.
- Say that the normal rules of confidentiality apply (ie, not to name people who are not present or disclose content of discussions outside of the meeting without agreement)

## Review - essential for maximising the benefits from project investments

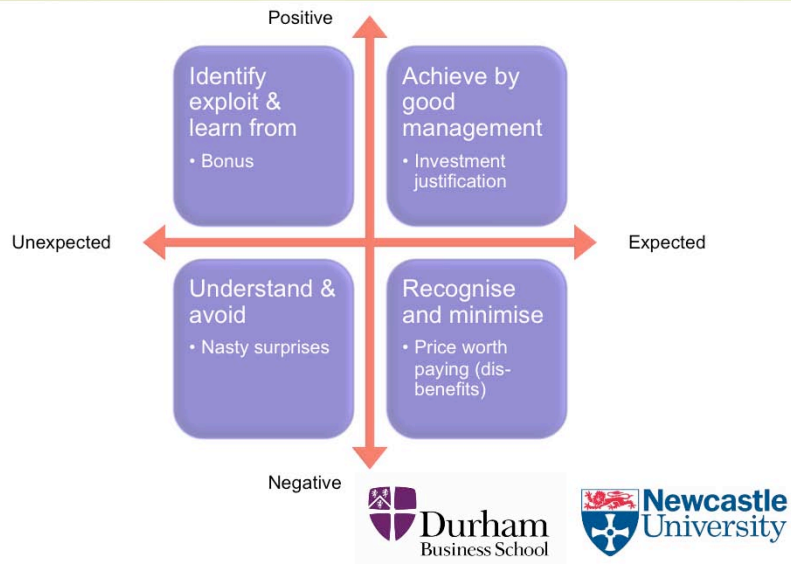
the ability of the organisation to actively engage in...



For anyone new to the concept of Benefits Realisation, this slide helps to illustrate the core competences or capabilities that are crucial to successful IT-enabled change and project delivery.

It's common sense, and also proven by John Ward's research, that **when project teams plan to review their project**, ideally during and after implementation, **there is an increased likelihood of success**.

## Scope of the Benefits Review...



This matrix is a key model for the Benefits Review.

**Drawing this matrix on a flip chart as you explain it has more impact.**

You can then overlay it with examples of benefits and 'dis-benefits/dis-advantages' related to the Project, later on in the session.

## Step 1 - Discuss....

- Why did the Project need to be undertaken?
- What were the overall objectives?



***5 Minutes Discussion, 10 minutes group review.***

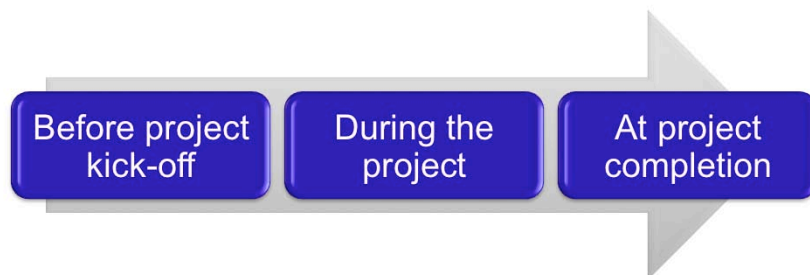
**Use these questions to prompt an open group discussion** (for 6 or fewer people).

- For more than 8 people, establish smaller groups of 4 and let the discussion run for 5 minutes before asking for headline summaries from the whole group.
- Write the key points on a flip chart.

Points to note, questions to ask the group during the review:

- What's the degree of agreement, or disagreement about the answers to these questions? Why is that?***
- Are there different responses from people with different perspectives*** (eg, users versus project team or sponsors)? What is the learning from that.
- Watch out for getting too bogged down in going over history at this point.** Write up any key questions or issues and move on, let the group know that they will be able to go into this in more detail later.

## Step 2 – What worked, what didn't?



1. What went well? What could be improved?
2. Work individually to start with – make notes on post-its
3. Post and sort them on the wall-chart.



*10-15 minutes for individuals to write up each item they think of (or get people working in pairs or trios in larger groups) and post on relevant section of the wall-chart.*

*15-20 minutes to review and discuss output.*

|          | Before | During | After |
|----------|--------|--------|-------|
| Positive |        |        |       |
| Negative |        |        |       |

During the group review of output, prompt for the following key themes / issues:

- **Clarity of goals**, strategy and vision
- Success of **stakeholder communication** & engagement
- The extent to which business conditions changed during the project and the impact on the **effectiveness of change management**.
- How well the project progresses according to **project planning, milestones and risk-management** etc.
- Keep the focus on specific examples as opposed to generalised statements.

### Step 3 – Benefits & ‘Dis-benefits’?...

- What were the outcomes in terms of Benefits and ‘dis-benefits’ (dis-advantages)?
- Which were expected or unexpected?
- What ‘measures’ can be attributed?



**10-15 minutes**

Use this slide to prompt further discussion.

If there are a number of key topics or themes, you can ask 2 or 3 people to address these questions for each area. This can help to keep everyone engaged in a larger group or where there are lots of issues to be addressed.



## Step 4 – Lessons for the Team...

- What aspects of our project team work and processes do we want to retain?
- What do we need to do differently?



***10-15 Minutes***

Again, use these questions to prompt either a whole group discussion or you can split into representative groups (eg, users, steering group etc) for larger gatherings.

## Step 5: Sharing the Learning...

- General lessons for other projects?
- How will the lessons learned be communicated and acted on?
- Who will ensure this gets done, and by when?!



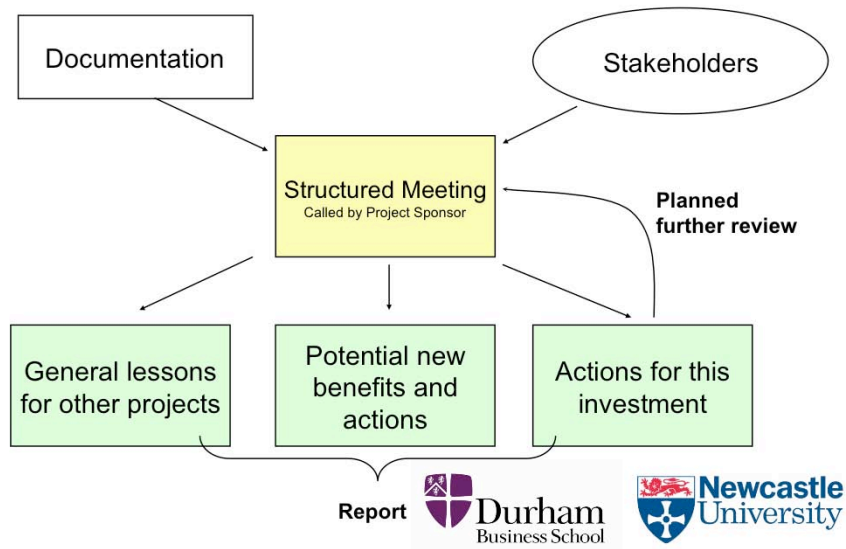
*15 minutes*

This is the action planning phase:

- It's important to **get to as many specific action points as necessary** and identify how each action will be forwarded.
- It can help if two people volunteer to be accountable for a specific point**, get them to agree when and how they will progress the actions, if necessary.
- Agree who will co-ordinate the actions** (don't assume this job should fall to you, the facilitator of the review!).
- Attach a name/names and target timescales** to each action wherever possible.

*This part of the process can require a bit of tenacity on your part as the facilitator! Be firm and look back at the initial list of agreements about how to get the most from the session.*

## Step 6 – What output do we need to capture from today?



- **Take photographs of all your visual output** which can easily be posted and shared after the event.
- **Agree what else needs to be collated**, typed up or distributed in whatever manner is suitable.
- ***Don't assume you have to do all the documentation as the facilitator!*** Enlist others to share the task if needs be.

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Thank you



Thank everyone and clearly state next steps – if any have been agreed.

*You may wish to ask for the group's feedback on the session, what have they enjoyed and how could the session be delivered differently next time?*

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- Based on the process of Benefits Management developed by Prof John Ward Peter Murray & others at Cranfield.
- See Benefits Management (2005) by Ward J and Daniels E (Wiley)



Simply a reference slide if anyone wants to undertake further reading.