



LESSONS LEARNED

LEVEL 5 PROJECT



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INTRODUCTION



You have reached an important milestone in your Toastmasters journey. Not only are you nearing the completion of this path, but you have completed a major project involving planning, leadership, and team management. The “Lessons Learned” project is designed to help you understand the steps to debrief team members and key stakeholders at major milestones and after the completion of your project.

Please note: *This project must be started AFTER the completion of a separate, larger project on this path that involved completing a task with a team. Please complete a different elective if your most recent project on this path did not involve team members.*

Any project, including the organization of an event, can benefit from a lessons learned meeting. A meeting of this type gives you and your team the opportunity to evaluate the results of your work. By assessing feedback and applying it to future events, you enhance your growth as a leader and a communicator.

In this project, you will identify the discussion points of a large group meeting, encourage a culture of contribution and voicing opinions, and facilitate productive discussion that yields results. You will also learn to create a plan for future improvements based upon resolutions proposed in the meeting.

YOUR ASSIGNMENT

Purpose: The purpose of this project is to learn about and apply the skills needed to run a lessons learned meeting during a project or after its completion.

Overview: Facilitate a lessons learned meeting for a team with which you are completing or have completed a project. This meeting is separate from your regular Toastmasters meeting. Organize and facilitate a discussion. Record the results into a document you and your team members can use to facilitate the current project or future projects. If you haven't already, give team members an opportunity to complete a 360° evaluation of you as a team leader. (Use the 360° Evaluation resource on page 16.) Finally, present a 5- to 7-minute speech in your club about the lessons learned meeting or your leadership experience.

For all assignment details and requirements, review the Project Checklist on page 11.



Throughout this project you will see icons in the margins next to the text. These icons indicate additional resources available online.



Video: Sign in to Base Camp to watch a video that supports this project.



Interactive Activity: Sign in to Base Camp to complete an interactive activity.



Resource: Sign in to Base Camp to view this resource online.

ASSESS YOUR SKILLS

Evaluate your current skill level by rating each statement.



Select the appropriate number based on your skills today:

5
EXEMPLARY

4
EXCEL

3
ACCOMPLISHED

2
EMERGING

1
DEVELOPING

Pre-Project					Statement	Post-Project				
5	4	3	2	1	I am confident that I can create a clear agenda for a lessons learned meeting.	5	4	3	2	1
5	4	3	2	1	I am able to apply what I have learned to improve procedures and outcomes in future projects.	5	4	3	2	1
5	4	3	2	1	I am comfortable listening to differing opinions and suggestions for improvement.	5	4	3	2	1
5	4	3	2	1	I recognize how this project applies to my life outside of Toastmasters.	5	4	3	2	1

COMPETENCIES

The following is a list of competencies that you will learn and practice in this project.

- Identify the topics for discussion with your team following a milestone or completion of a project.
- Encourage an environment of contribution and voicing opinions.
- Facilitate a productive discussion that yields results.
- Create a plan for future improvements based upon resolutions proposed in the meeting.

THE VALUE OF A LESSONS LEARNED MEETING

The ability to learn from experience builds strength and understanding in any environment. A lessons learned meeting is an opportunity to gather your team and stakeholders to discuss both positive and negative aspects of your project.

A meeting of this type can be held after any milestone when review contributes to the success of the project as well as when the project is complete.

Every aspect of a lessons learned meeting is enhanced by coming together as soon as possible after a milestone or at the conclusion. Small details are easier to remember when little time has passed.

During the meeting, take time to recognize and discuss successful elements and strategies. Identify and examine details of your project that did not go according to plan. Discussing even the smallest challenge can add to your team's understanding of how to avoid pitfalls in future projects.

PREPARE FOR A LESSONS LEARNED MEETING

Treat a lessons learned meeting as you would any essential step in coordinating a large project or event. There are several steps you can take to support a well-run meeting.

SCHEDULE

Plan lessons learned meetings with as much advance notice as possible to ensure maximum attendance of team members and other stakeholders. You can cancel meetings after milestones if they are not necessary, but setting firm dates ahead of time will guarantee time for follow up and review.

REVIEW

As the team leader, review feedback before your meeting to help you prepare and develop your agenda. Collect responses from internal team members and other participants if your project included an event.

Surveying participants immediately following project completion is an excellent way to assemble responses and can help you define topics to address in the lessons learned meeting.

SET AN AGENDA

A clear agenda enables you to address all ideas, thoughts, and concerns while staying within the time allocated for the meeting.

The agenda can include:

- Well-defined meeting goals
- A suggested sequence of team discussion, brainstorming, and analysis
- Any potential action items



Use the Lessons Learned Response Log on page 22. Put your agenda items in the far left column. This resource provides space to note responses to each item when conducting your lessons learned meeting.

CONDUCT A LESSONS LEARNED MEETING

REFLECT AND DISCUSS

A lessons learned meeting involves reflection, analysis, and discussion. It is an opportunity for everyone to contribute their unique perspective. Support all participants in sharing issues they observed throughout the project, and let them know that their input is valued. Create an environment of productivity and openness.

SET THE TONE

Your first and most important job as the leader of a lessons learned meeting is to set the tone. Begin by thanking all of your team members and stakeholders for their hard work and participation. Identify the parts of your project that were generally successful while allowing time for other opinions and feedback.

For example, if your project was an open house for your club and your attendance was at or above your expectations, mention the attendance. Your goal in setting the tone is to encourage other meeting attendees to lead with a positive aspect of the project before addressing challenges. In that way you encourage a balanced conversation instead of a session focused on negative comments.

REVIEW YOUR EXPECTATIONS

Invite your team to share their initial expectations for the project. Do this by asking each team member to describe his or her version of the ideal project or imagined, perfect outcome (not necessarily the actual results of the project).

Once each person has had the opportunity to share initial expectations, assess what elements of his or her ideal project were realized. Identify the organization, implementation, or facilitation methods that worked well throughout the course of your project.

SHARE AND DISCUSS FEEDBACK

Use the following methods to support a varied and thorough discussion.

- Share feedback received from external project stakeholders.
- Prepare a list of questions to direct the discussion.
- Stay neutral—all feedback, both positive and negative, can provide valuable insight.
- Take notes on a whiteboard or flip chart or ask a team member to record comments.
- Impose a time limit to give everyone a chance to share their input or respond to questions.
- Review concerns, issues, or unexpected circumstances that occurred during the planning and implementation of your project.

REVIEW AND ANALYZE

Once everyone in the group has given their feedback, analyze and discuss the information. If applicable, have your team contribute ideas toward the development of an action plan for future projects.

Project management or spreadsheet software can be a valuable tool to analyze the information collected during your lessons learned meeting.

AFTER THE LESSONS LEARNED MEETING

CREATE A RECORD

Record all ideas, suggestions, and comments presented in the meeting. Disseminate the meeting notes with team members via email, shared drive, or printed document. Encourage all lessons learned meeting participants to add suggestions to the record, even after the meeting is over. Use this record as a reference when organizing future projects.

USE METRICS



Metrics are measurement standards to assess efficiency, progress, and performance. After your meeting, complete the Metrics Log on page 23 with the information you collected.

APPLY THE LESSONS LEARNED

Applying feedback to future projects or events is the most important aspect of the lessons learned process. A lessons learned meeting allows your team to celebrate successes and identify what worked well for use in the future.

Implementing proposed improvements can benefit the outcomes of your future projects. Continue to learn from both your successes and challenges. Take time to compare new feedback with what's been gathered from past projects. The comparison will allow you to see where your team improved or where additional help is needed.

REVIEW AND APPLY

Before you complete the assignment, take a moment to read through the questions you see here. If you are not able to answer them comfortably, review the project.

- How will you identify the discussion topics for a lessons learned meeting?
- What are some strategies for encouraging a safe environment for all types of feedback?
- As a facilitator, what are the best methods for supporting a productive discussion?
- How can you use the information you gain in your lessons learned meeting to plan for improvements in future events or projects?

COMPLETE YOUR ASSIGNMENT



Now that you have read through the project, plan and prepare your speech or report.

Review: Return to page 3 to review your assignment.



Organize: Use the Project Checklist on page 11 to review the steps and add your own. This will help you organize and prepare your assignment.

Schedule: Work with the vice president education to schedule your speech.



Prepare: Prepare for your evaluation. Review the evaluation resources on pages 13–15 and share all resources with your evaluator before your speech. You may choose to share your evaluation resources online.

PROJECT CHECKLIST

Lessons Learned

Purpose: The purpose of this project is to learn about and apply the skills needed to run a lessons learned meeting during a project or after its completion.

Overview: Facilitate a lessons learned meeting for a team with which you are completing or have completed a project. This meeting is separate from your regular Toastmasters meeting. Organize and facilitate a discussion. Record the results into a document you and your team members can use to facilitate the current project or future projects. If you haven't already, give team members an opportunity to complete a 360° evaluation of you as a team leader. (Use the 360° Evaluation resource on page 16.) Finally, present a 5- to 7-minute speech in your club about the lessons learned meeting or your leadership experience.

This project includes:

- Facilitating a lessons learned meeting
- Documenting the results of the lessons learned meeting
- The 360° Evaluation resource
- The Lessons Learned Response Log
- The Metrics Log
- A 5- to 7-minute speech

Below are tasks you will need to complete for this project. Please remember, your project is unique to you. You may alter the following list to incorporate any other tasks necessary for your project.

Before you can begin the "Lessons Learned" project, you must have completed a separate, larger project on this path that involved completing a task with a team. Please complete a different elective if your most recent project on this path did not involve team members.

Invite the team from your previous project to your lessons learned meeting.

Use the steps described in the "Lessons Learned" project to conduct your meeting.

Give your team members an opportunity to complete a 360° evaluation of you as a team leader.

Schedule your speech with the vice president education.

Write a speech about your experience during and after the lessons learned meeting.

Rehearse your speech.

After you have completed all components of the assignment, including your speech, return to page 4 to rate your skills in the post-project section.

Additional Notes

EVALUATION FORM

Lessons Learned

Member Name _____ Date _____

Evaluator _____ Speech Length: 5 – 7 minutes

Speech Title _____

Purpose Statements

- The purpose of this project is for the member to learn about and apply the skills needed to run a lessons learned meeting during a project or after its completion.
- The purpose of this speech is for the member to share some aspect of his or her leadership experience and the impact of a lessons learned meeting.

Notes for the Evaluator

During the completion of this project, the member:

- Worked with a team to complete a project
- Met with his or her team on many occasions, most recently to facilitate lessons learned meeting. This meeting may occur during the course of the project or at its culmination.

About this speech:

- The member will deliver a well-organized speech.
- The member may choose to speak about an aspect of the lessons learned meeting, his or her experience as a leader, the impact of leading a team, or any other topic that he or she feels is appropriate.
- The speech must relate in some way to the member's experience as a leader.
- The speech may be humorous, informational, or any other style the member chooses. The topic should support the style the member has selected.
- The speech should not be a report on the content of the "Lessons Learned" project.

General Comments

You excelled at:

You may want to work on:

To challenge yourself:

EVALUATION FORM – Lessons Learned

For the evaluator: In addition to your verbal evaluation, please complete this form.

5 EXEMPLARY	4 EXCELS	3 ACCOMPLISHED	2 EMERGING	1 DEVELOPING	
Clarity: Spoken language is clear and is easily understood					Comment:
5	4	3	2	1	
Vocal Variety: Uses tone, speed, and volume as tools					Comment:
5	4	3	2	1	
Eye Contact: Effectively uses eye contact to engage audience					Comment:
5	4	3	2	1	
Gestures: Uses physical gestures effectively					Comment:
5	4	3	2	1	
Audience Awareness: Demonstrates awareness of audience engagement and needs					Comment:
5	4	3	2	1	
Comfort Level: Appears comfortable with the audience					Comment:
5	4	3	2	1	
Interest: Engages audience with interesting, well-constructed content					Comment:
5	4	3	2	1	
Topic: Shares some aspect of experience as a leader and the impact of the lessons learned meeting					Comment:
5	4	3	2	1	

EVALUATION CRITERIA

Lessons Learned

This criteria lists the specific goals and expectations for the speech. Please review each level to help you complete the evaluation.

Clarity

- 5 – Is an exemplary public speaker who is always understood
- 4 – Excels at communicating using the spoken word
- 3 – Spoken language is clear and is easily understood
- 2 – Spoken language is somewhat unclear or challenging to understand
- 1 – Spoken language is unclear or not easily understood

Vocal Variety

- 5 – Uses the tools of tone, speed, and volume to perfection
- 4 – Excels at using tone, speed, and volume as tools
- 3 – Uses tone, speed, and volume as tools
- 2 – Use of tone, speed, and volume requires further practice
- 1 – Ineffective use of tone, speed, and volume

Eye Contact

- 5 – Uses eye contact to convey emotion and elicit response
- 4 – Uses eye contact to gauge audience reaction and response
- 3 – Effectively uses eye contact to engage audience
- 2 – Eye contact with audience needs improvement
- 1 – Makes little or no eye contact with audience

Gestures

- 5 – Fully integrates physical gestures with content to deliver an exemplary speech
- 4 – Uses physical gestures as a tool to enhance speech
- 3 – Uses physical gestures effectively
- 2 – Uses somewhat distracting or limited gestures
- 1 – Uses very distracting gestures or no gestures

Audience Awareness

- 5 – Engages audience completely and anticipates audience needs
- 4 – Is fully aware of audience engagement/needs and responds effectively

- 3 – Demonstrates awareness of audience engagement and needs
- 2 – Audience engagement or awareness of audience requires further practice
- 1 – Makes little or no attempt to engage audience or meet audience needs

Comfort Level

- 5 – Appears completely self-assured with the audience
- 4 – Appears fully at ease with the audience
- 3 – Appears comfortable with the audience
- 2 – Appears uncomfortable with the audience
- 1 – Appears highly uncomfortable with the audience

Interest

- 5 – Fully engages audience with exemplary, well-constructed content
- 4 – Engages audience with highly compelling, well-constructed content
- 3 – Engages audience with interesting, well-constructed content
- 2 – Content is interesting but not well-constructed or is well-constructed but not interesting
- 1 – Content is neither interesting nor well-constructed

Topic

- 5 – Delivers an exemplary speech about some aspect of experience as a leader and the impact of the lessons learned meeting
- 4 – Delivers a compelling speech about some aspect of experience as a leader and the impact of the lessons learned meeting
- 3 – Shares some aspect of experience as a leader and the impact of the lessons learned meeting
- 2 – Mentions some aspect of experience as a leader and the impact of the lessons learned meeting but does not fully address
- 1 – Speaks on a topic other than some aspect of experience as a leader and the impact of the lessons learned meeting

360° EVALUATION

Evaluator Name _____ Date _____

Role _____

Leader Name (person to be evaluated) _____

Timeframe for Evaluation _____

Please consider your experience working with the leader you are evaluating and give a thoughtful response to all the questions presented here. If you have not observed a particular behavior or quality, indicate "Not observed" on your evaluation. Take a moment to include examples wherever possible and if needed, add additional pages.

Using the rating scale provided below for survey-style questions, please circle the number that best reflects your rating of the individual's performance during the time period being evaluated.

Leadership

1	2	3	4	5	N/A
DEVELOPING	EMERGING	ACCOMPLISHED	EXCELS	EXEMPLARY	NOT APPLICABLE

Provides a clear sense of purpose, direction, and responsibilities to team members	Comment:
1 2 3 4 5 N/A	
Acts and behaves in a manner consistent with his or her statements	Comment:
1 2 3 4 5 N/A	
Manages issues in an effective manner	Comment:
1 2 3 4 5 N/A	

Provide an example of how he or she positively contributes through his or her leadership.

How can the individual improve his or her leadership?

Communication

1	2	3	4	5	N/A
DEVELOPING	EMERGING	ACCOMPLISHED	EXCELS	EXEMPLARY	NOT APPLICABLE

Is open to constructive feedback						Comment:
1	2	3	4	5	N/A	
Gives appropriate feedback that is timely and constructive						Comment:
1	2	3	4	5	N/A	
Manages conflict effectively						Comment:
1	2	3	4	5	N/A	

How has the individual demonstrated effective communication skills?

Describe how he or she has implemented constructive feedback.

Interpersonal Skills

1	2	3	4	5	N/A
DEVELOPING	EMERGING	ACCOMPLISHED	EXCELS	EXEMPLARY	NOT APPLICABLE

Shows genuine concern for all team members						Comment:
1	2	3	4	5	N/A	
Perceived as trustworthy						Comment:
1	2	3	4	5	N/A	
Recognizes and rewards individual contributions in a manner meaningful to each team member						Comment:
1	2	3	4	5	N/A	

How would you recommend that the individual improve his or her interpersonal and relationship-building skills?

Teamwork and Team Building

1	2	3	4	5	N/A
DEVELOPING	EMERGING	ACCOMPLISHED	EXCELS	EXEMPLARY	NOT APPLICABLE

Supports a team environment by valuing collaboration and cooperation						Comment:
1	2	3	4	5	N/A	
Supports the organization at all levels						Comment:
1	2	3	4	5	N/A	

Considers the impact of actions and decisions on the organization before implementing

1 2 3 4 5 N/A

Comment:

How does the individual contribute to the successful and effective functioning of his or her team?

Problem Solving

1 2 3 4 5 N/A
 DEVELOPING EMERGING ACCOMPLISHED EXCELS EXEMPLARY NOT APPLICABLE

Listens actively to others' ideas and perspectives

1 2 3 4 5 N/A

Comment:

Is prepared to make decisions based on relevant information

1 2 3 4 5 N/A

Comment:

Is willing to change his or her position when presented with compelling information

1 2 3 4 5 N/A

Comment:

Give an example of a time when the individual displayed exemplary problem-solving skills.

What recommendations do you have for the individual to improve his or her problem solving skills?

Motivation

1	2	3	4	5	N/A
DEVELOPING	EMERGING	ACCOMPLISHED	EXCELS	EXEMPLARY	NOT APPLICABLE

Shows interest in and enthusiasm for the work to be completed						Comment:
1	2	3	4	5	N/A	
Uses effective strategies to motivate his or her team members						Comment:
1	2	3	4	5	N/A	
Rises to challenges						Comment:
1	2	3	4	5	N/A	

Give an example of a successful motivational strategy he or she used while leading the team.

Give an example of the individual's level of motivation.

Prioritization

1	2	3	4	5	N/A
DEVELOPING	EMERGING	ACCOMPLISHED	EXCELS	EXEMPLARY	NOT APPLICABLE

Allots time appropriately to tasks that require attention						Comment:
1	2	3	4	5	N/A	
Manages time to keep high-priority tasks at the forefront						Comment:
1	2	3	4	5	N/A	

In general, does the individual prioritize action items and follow through on the priorities he or she set?

In your opinion, does he or she select the appropriate priorities?

Reliability

1 DEVELOPING	2 EMERGING	3 ACCOMPLISHED	4 EXCELS	5 EXEMPLARY	N/A NOT APPLICABLE
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Sets and honors milestones and timelines						Comment:
1	2	3	4	5	N/A	
Establishes an agenda for every meeting and effectively covers all topics in the allotted time						Comment:
1	2	3	4	5	N/A	
Is respectful of others' time and commitments outside of the organization						Comment:
1	2	3	4	5	N/A	

Can you depend on the individual to keep his or her commitments?

Describe how the individual demonstrates respect for others' time and commitments.

LESSONS LEARNED RESPONSE LOG

Project Name	Experience	Lessons Learned	Recommendation

METRICS LOG

Use this form to track metrics and responses. For a list of sample metrics, refer to the "Lessons Learned" project.

Project Name			
Metric	Purpose of Measure	Result	Comments
Increase in membership	Evaluate the effectiveness of an open house to improve and sustain club.	Exceeded goal by 15%	Hold another open house in six months



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