

## Lessons Learned Template

Capturing lessons learned ensures that valuable experience is not lost once a project or activity ends. This template helps teams record insights, successes, and mistakes to improve future projects and organisational learning.

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### 1. Purpose of This Tool

- ☐ Document key takeaways from projects, initiatives, or major activities.
- ☐ Encourage continuous learning and improvement across teams.
- ☐ Identify what worked well and what should change next time.
- ☐ Create a central record of insights for future reference.
- ☐ Strengthen project governance and organisational maturity.

**Tip:** Lessons learned are only valuable when they are shared and acted upon.

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### 2. Project Information

| Field | Details |
|-------|---------|
|-------|---------|

|              |  |
|--------------|--|
| Project Name |  |
|--------------|--|

|                       |  |
|-----------------------|--|
| Department / Function |  |
|-----------------------|--|

|                 |  |
|-----------------|--|
| Project Manager |  |
|-----------------|--|

|         |  |
|---------|--|
| Sponsor |  |
|---------|--|

|            |  |
|------------|--|
| Start Date |  |
|------------|--|

|                 |  |
|-----------------|--|
| Completion Date |  |
|-----------------|--|

- ☐ Complete this section to provide context for the lessons.

**Tip:** Always include sufficient background for future readers unfamiliar with the project.

### 3. Project Summary

#### Description

Provide a brief overview of the project scope, objectives, and outcomes.

- ☐ Keep the summary concise - one paragraph is usually enough.

**Tip:** The summary gives context for understanding each lesson.

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### 4. Key Successes

| Area | What Worked Well | Why It Worked | How to Repeat It |
|------|------------------|---------------|------------------|
|------|------------------|---------------|------------------|

Planning

Communication

Collaboration

Risk Management

Delivery

- ☐ Identify specific actions or practices that contributed to success.

**Tip:** Documenting successes prevents teams from reinventing what already works.

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### 5. Key Challenges

| Area | What Went Wrong | Underlying Cause | Impact |
|------|-----------------|------------------|--------|
|------|-----------------|------------------|--------|

Planning

Communication

Resources

Governance

Delivery

- ☐ Focus on understanding, not blame - insight is more valuable than fault-finding.

**Tip:** Honest reflection leads to the biggest improvements.

## 6. Lessons Learned

| Lesson Description | Category (Success / Challenge) | Recommendation | Priority (H/M/L) | Owner |
|--------------------|--------------------------------|----------------|------------------|-------|
|--------------------|--------------------------------|----------------|------------------|-------|

☐ Summarise the most significant lessons in clear, actionable terms.

**Tip:** Link each recommendation directly to the observed lesson to make it practical.

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## 7. Actions for Future Projects

| Action | Responsible Person | Target Date | Status | Notes |
|--------|--------------------|-------------|--------|-------|
|--------|--------------------|-------------|--------|-------|

☐ Assign ownership to ensure lessons are implemented, not just recorded.

**Tip:** Learning only has value when it leads to action.

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## 8. Risk and Prevention Review

| Lesson Reference | Potential Risk for Future Projects | Preventative Action | Owner |
|------------------|------------------------------------|---------------------|-------|
|------------------|------------------------------------|---------------------|-------|

☐ Identify how lessons can reduce future risk or strengthen processes.

**Tip:** The best lessons prevent the same problem from happening again.

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## 9. Communication and Sharing Plan

| Audience | Format (Meeting / Report / Portal Upload) | Responsible Person | Completion Date |
|----------|-------------------------------------------|--------------------|-----------------|
|----------|-------------------------------------------|--------------------|-----------------|

Project Team

Department

Leads

Senior

Management

☐ Share lessons promptly after project closure to ensure knowledge transfer.

**Tip:** Lessons locked in a document have little value - share widely.

## 10. Lessons Learned Summary

| Category | Number of Lessons | Key Themes Identified |
|----------|-------------------|-----------------------|
|----------|-------------------|-----------------------|

|           |  |  |
|-----------|--|--|
| Successes |  |  |
|-----------|--|--|

|            |  |  |
|------------|--|--|
| Challenges |  |  |
|------------|--|--|

|                 |  |  |
|-----------------|--|--|
| Recommendations |  |  |
|-----------------|--|--|

☐ Use this summary for leadership reports or end-of-project presentations.

**Tip:** Highlight recurring themes across projects - these indicate systemic opportunities for improvement.

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### How to Use This Template

Use this template at project close or after major milestones. Facilitate a structured lessons learned meeting, capturing feedback from all stakeholders. Store completed documents in a shared location for easy access. Combine with the Root Cause Analysis Worksheet and Continuous Improvement Checklist to embed learning into future work.

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### Notes