Preview

Project Retrospective Procedure

Introduction

Purpose

Significant insight can be gained by analyzing a software development project and identifying which processes, activities, and characteristics were successful and which were not. The primary goal of a project retrospective (also called a post-mortem, debriefing, or post-project review) is to learn lessons and make process improvements that can help planning and execution on future projects. This learning occurs by raising significant positive and negative issues, identifying root causes, and recommending improvements, typically through a retrospective meeting. This document describes a procedure for conducting a project retrospective.

Each project should hold a retrospective at least at the end of its lifecycle. For projects of more than six months duration, mid-project reviews can also be useful. Retrospectives also can be held at major milestones or at the end of iterations.

Work Aids

- Retrospective Planning Worksheet
- Retrospective Summary Report Template

References

1. Derby, Esther, and Diana Larsen. 2006. *Agile Retrospectives: Making Good Teams Great*. Raleigh, N. C.: The Pragmatic Bookshelf.
2. Kerth, Norman L. 2001. *Project Retrospectives: A Handbook for Team Reviews*. New York: Dorset House Publishing.

Roles

Role	Description
Coordinator	The individual designated by the Sponsor to lead the planning and execution of the retrospective.
Facilitator	A person from outside the project team who leads the retrospective meeting to ensure that it proceeds as planned and to keep discussions on track. Generates and distributes outputs from retrospective meeting.
Participants	Perform any necessary preparation. Gather project metrics data and artifacts. Actively participate in the retrospective meeting.
Project Manager	The individual who managed the project that is being reviewed during the retrospective.
Scribe	Records information and issues discussed during review meeting.
Sponsor	Management representative who is sponsoring the retrospective. May be the project manager or a senior manager.

Entry Criteria

- ❑ The project has reached a major phase milestone, is completed, or was canceled.
- ❑ The Sponsor has requested that a retrospective be held.
- ❑ The Sponsor has assigned a retrospective Coordinator.
- ❑ The Coordinator has arranged for a Facilitator.

Planning

Using the Planning Worksheet	The Coordinator explores the items listed below when planning the retrospective, working with the project manager. Note responses and decisions on the Retrospective Planning Worksheet.
Objectives	Determine what the Sponsor wishes to accomplish as a result of the retrospective. Some possibilities: • Improve process assets (such as procedures, checklists, and templates) • Motivate and empower the team to improve its own processes • Focus on a specific objective, such as improving communication within the team or between the team and other functional groups • Identify high-leverage improvement opportunities
Beneficiaries	Identify the target beneficiaries of the retrospective. Possibilities include: • Project management • Senior management • Software development team • Other engineering groups • Future project teams
Scope	Define the scope of the retrospective. • A single project or multiple projects? • Which functional areas are participating? • Are there specific issues to be targeted for the retrospective, or do you want an unbiased exploration of the project and identification of issues?
Participants	Determine who should participate in the review meeting. Use the retrospective objective and scope to determine the participants. Consider the culture, size, diversity, and geographic locations of the project team. Consider whether managers should participate in the entire review meeting, for part of the meeting, or in a meeting separate from the rest of the project team
Deliverables	State the deliverables that the retrospective will produce. The primary deliverable is the Retrospective Summary Report. Other deliverables (such as an action plan) should be designed to suit the needs of the beneficiaries.
Issue Generation	Decide whether issue generation should take place prior to or during the retrospective meeting. • If you are uncertain what to focus on for improvement or what specific issues need to be examined, perform issue generation during the review meeting in order to use group synergy to identify and formulate issues. • If the Sponsor or Project Manager wants to explore specific topics, then prior issue generation around those topics, and possibly others suggested by the reviewers, can save time and can focus the meeting time more effectively.
Number of Meetings	Determine how many review meetings to hold. In general, it is best to have all participants work together concurrently. Consider holding multiple meetings when: • An objective is to solicit management and engineering issues separately • You wish to separate the surfacing of issues from analysis and generating recommendations around those issues • Participants are geographically separated • A single meeting would involve too many people for effective facilitation • There is a good reason to separate the project participants by functional area