

Worksheet 15-1: Retrospective Planning

Project: _____ Planning Date: _____

<i>Item</i>	<i>Considerations</i>	<i>Your Plan</i>
Sponsor	Who is the management sponsor for the retrospective?	
Objectives	What does the sponsor want to accomplish as a result of the retrospective?	
Beneficiaries	Who are the target beneficiaries of the retrospective?	
Scope	Single project or multiple projects? Exactly what is being reviewed? What functional areas are included? Are specific issues of particular interest for exploration?	Project(s): Functional Areas: Issues:
Participants	Who will participate in the retrospective?	
Deliverables	What documentation will result from the retrospective?	Interim Documentation: Final Documentation:
Issue Generation	Will issue generation take place prior to or during the review meeting? Using what methods?	Prior or During: Methods:
Number of Meetings	How many meetings should be planned, based on the scope of the retrospective?	
Agenda	List the retrospective meeting components and the time allocated to each.	Introduction: Time Line: Gather Issues: Cluster: Prioritize: Choose Key Issues: Root Cause: Recommend Improvements:

Techniques	What methods will be used for the major retrospective activities?	Cluster: Prioritize: Choose Key Issues: Root Cause: Recommend Improvements:
Roles	Who is the facilitator? Who is the scribe? What are their responsibilities?	Facilitator: Responsibilities: Scribe: Responsibilities:
Management Role	What is management's role in the context of the retrospective?	
Metrics	What project metrics will be collected and archived?	
Project Artifacts	What project artifacts will be collected and examined during the retrospective?	
Communicating Plans	How and by whom will the planning details be communicated to the participants?	
Individual Preparation	What individual preparation is necessary prior to the retrospective meeting?	
Logistics	What items does the facilitator need to take to the retrospective meeting (pens, markers, sticky notes, tape, paper, laptop)? Is the room properly equipped (projectors, flipcharts, space)?	
Communicating Results	How will the meeting results be communicated? Who will receive the communication? Consider objectives, scope, deliverables.	
Action Plan Owner	Who will be responsible for follow-up on action plans and process improvements following the retrospective?	