

Lessons Learned Review

Use this document to review one project or phase, turn observations into actionable lessons, and identify where the lessons should be reused. Transfer durable lessons to the companion register.

Project information

Field	Entry
Project name	[Enter project name]
Project manager	[Enter name]
Sponsor optional	[Enter name if applicable]
Phase or milestone	[Enter phase]
Review date	[Enter date]
Facilitator	[Enter name]
Participants	[Enter names or roles]

Review objective

[Describe the work or phase under review and what this session should produce.]

What went well

Observation	Contributing factors	Value created
[Describe a success]	[Why did it work?]	[What did it improve?]
[Describe another success]	[Supporting factors]	[Benefit]

What did not go well

Observation	Contributing factors	Impact
[Describe a challenge]	[What contributed?]	[Effect on work or people]
[Describe another challenge]	[Supporting factors]	[Impact]

Unexpected outcomes

[Record positive, negative, or neutral outcomes that were not anticipated. Keep observations separate from conclusions.]

Lesson records

For each reusable lesson, describe the evidence, recommendation, action owner, and future setting. Copy a record in Word when more space is needed.

Lesson [Lesson ID]

Field	Notes
Category and type	[Choose category and Success, Challenge, Improvement, or Unexpected Outcome]
Observation and evidence	[Observation and evidence]
Contributing factors	[Describe relevant conditions without turning this into a full root cause analysis]
Lesson learned	[Write a reusable lesson]
Recommendation	[State a specific repeat, change, or avoid recommendation]
Future applicability	[Describe future projects, teams, or processes where this applies]
Priority and status	[Low / Medium / High] [New / Reviewed / Action Planned / Applied / Closed / Not Applicable]

Follow-up actions

Action	Owner	Due date	Status
[Specific follow-up]	[Name or role]	[Date]	[Status]
[Specific follow-up]	[Name or role]	[Date]	[Status]

Review summary

Top lessons: [Summarize the most useful lessons, not every observation.]

Immediate actions: [Name owners and next dates.]

Future use: [State where this review should be consulted before similar work.]

Transfer to the register

For each lasting lesson, copy one record to the XLSX register. Keep its ID stable, select a category, type, priority, and status, and specify a recommendation, owner, and applicability. The review document captures one session; the register preserves lessons across projects.