



ATWELL

PERFORMING PROJECT POST-MORTEM REVIEWS

A WORKSHOP

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ABOUT ATWELL



POWER & ENERGY



OIL & GAS



REAL ESTATE &
LAND DEVELOPMENT



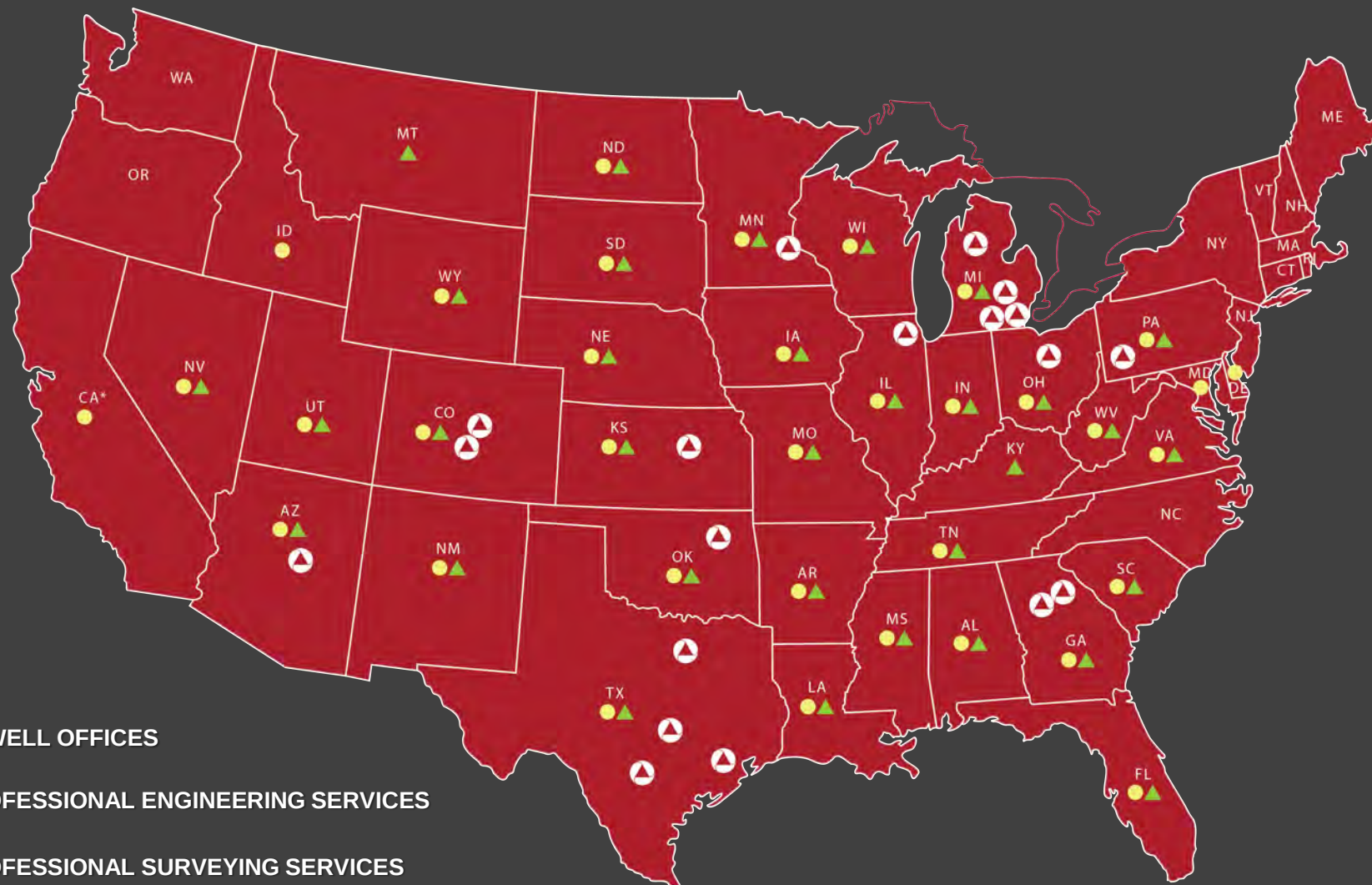
ATWELL OFFICES



PROFESSIONAL ENGINEERING SERVICES



PROFESSIONAL SURVEYING SERVICES



TEXT SURVEY FOR PARTICIPANTS



Tell Us Who You Are

Utility

Consultant

Land Agent

Government

Tell us what state you are from

Have you ever participated in a Project Post-Mortem Review process?

Yes

No

IN PREPARATION

- Applied experience
- Attendee feedback
- Interviews
- Research

SPECIAL THANK YOU TO DTE ENERGY

WHAT TO EXPECT

- OVERVIEW OF A PROJECT POST-MORTEM REVIEW
- BASICS OF A PPMR FORM
- PPMR TEAM
- CONDUCTING A PPMR
- CONCLUSION
- PPMR WORKSHOP





OVERVIEW OF A PROJECT POST-MORTEM REVIEW



**What
happened
before what
happened,
happened?**

WHAT IS A PROJECT POST-MORTEM REVIEW?

Developed by the military as an After Action Review process (AAR)

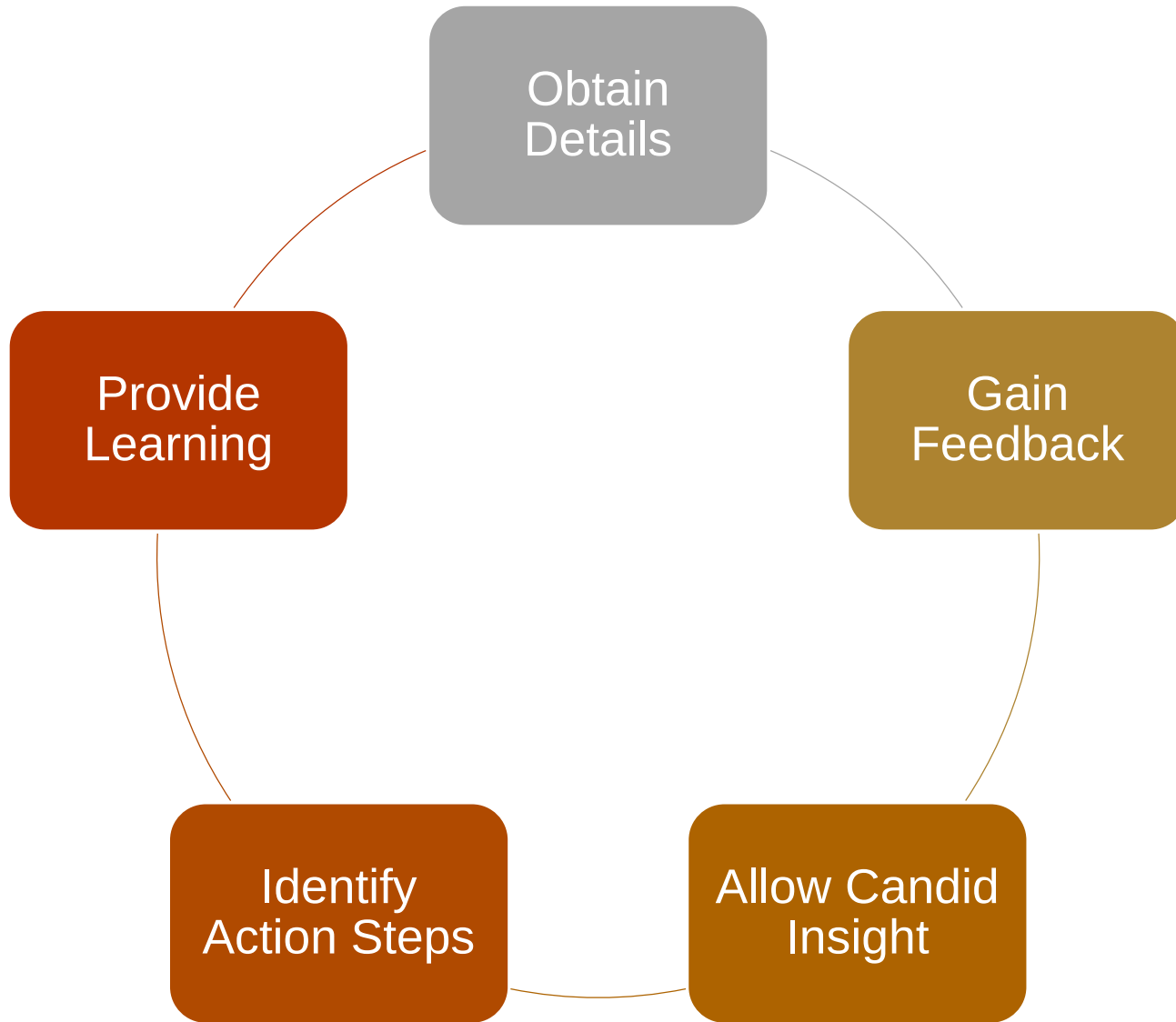
- Analysis of performance
 - What happened
 - Why it happened
 - How to sustain strengths
 - How to improve on weaknesses

SPECIAL THANK YOU TO OUR MILITARY

WHAT IS A PROJECT POST-MORTEM REVIEW?

- Structured retrospective review
- Learning tool to sustain or improve performance standards
- An open, honest discussion



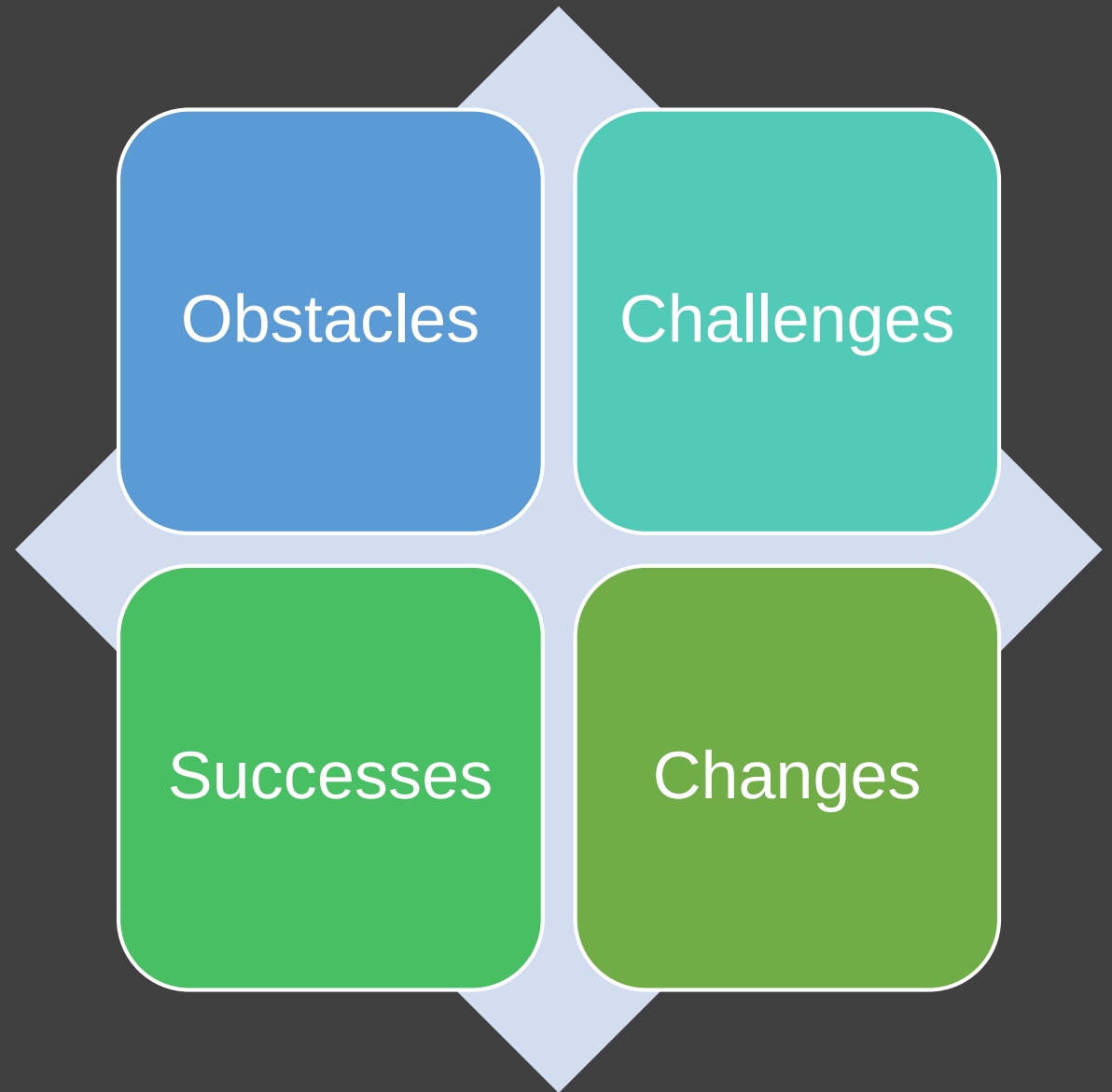


PURPOSE

To record, in detail, specific project activities that are effective and/or those activities that require adjustments for future projects.

OBJECTIVE

To inform future project teams of important lessons learned and what could be done differently.



WHAT A PPMR ISN'T

Random Conversation

Performance Review

Method of Placing Blame

For Disciplinary Purposes

Detailed Project Analysis

WHAT A PPMR IS

Structured Meeting

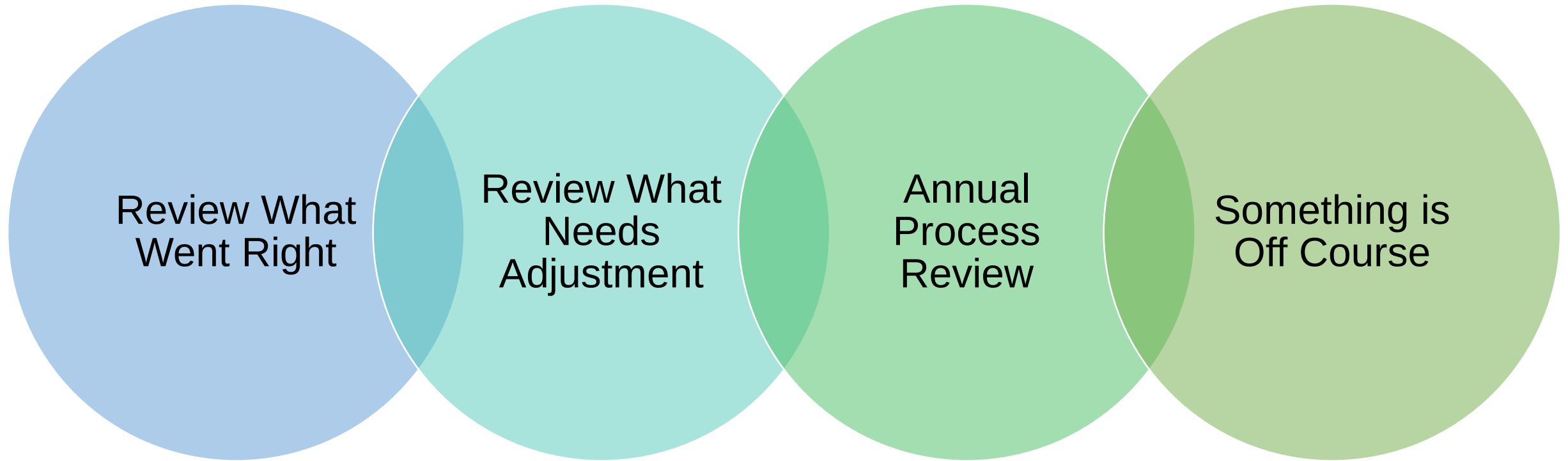
Focuses on Learning

Builds Trust

Organized Reflection

Mission Critical Review

REASONS TO ENGAGE



BENEFITS

Shared Knowledge Based on Experience

Improved Communication

Emphasizes Trust

Improves Quality

Increase Organizational Effectiveness

Culture of Continuous Improvement

Learning Tool

A Project Post-Mortem Review is a learning tool focusing on performance standards:

True

False

A PPMR is oftentimes utilized as a performance review:

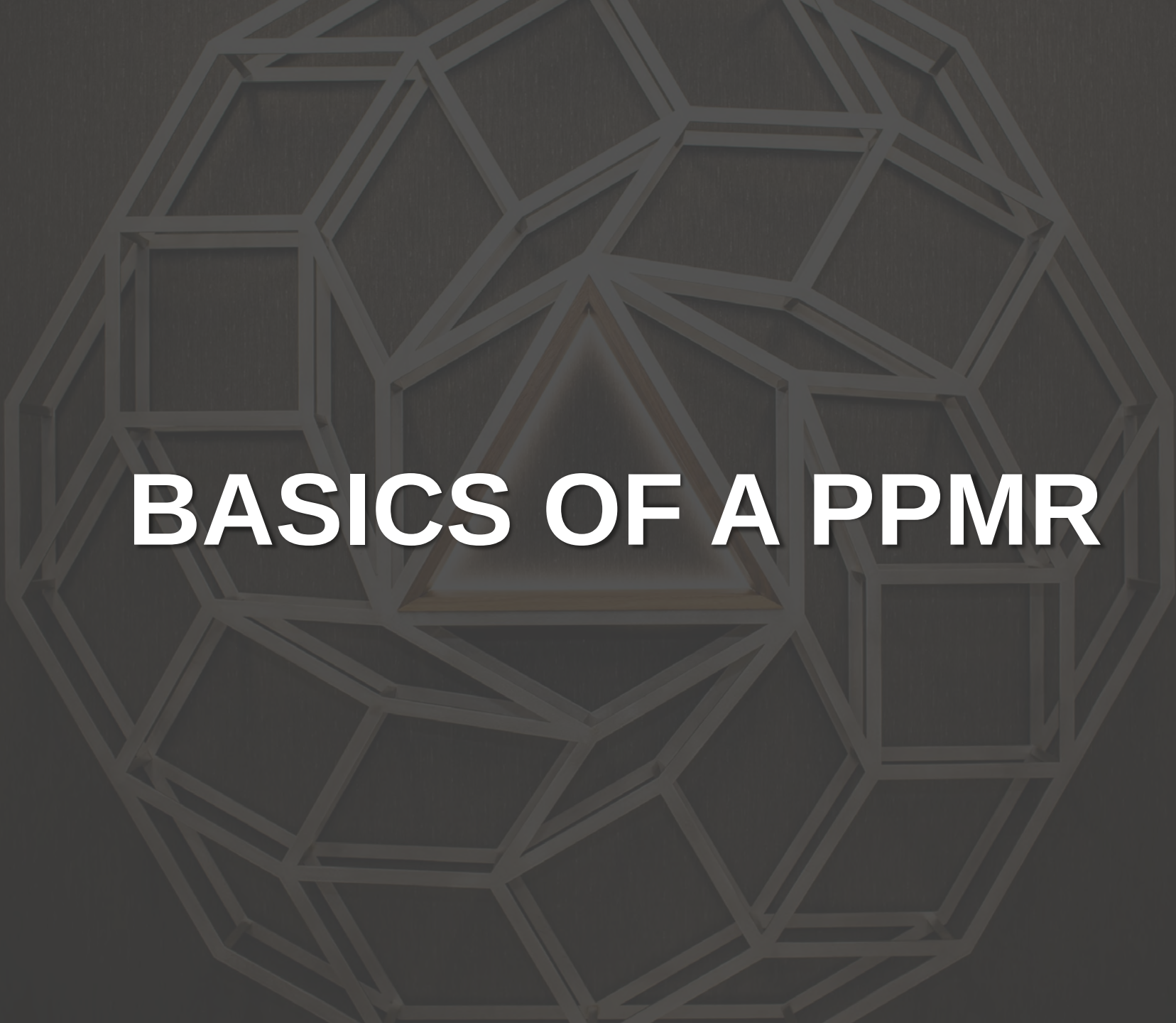
True

False

A PPMR only gives one viewpoint and frequently provides little opportunity for discussion of events:

True

False



BASICS OF A PPMR

FOUR QUESTIONS



PROJECT POST-MORTEM REVIEW FORM

PROJECT POST-MORTEM REVIEW		
Project:		
Project Overview:		
Client:		
Key Contacts:		
Objective:	Meeting Participants:	
Date:		
Location:		
What were the project objectives? What do we intend to do?		
What actually happened? And why was there a difference?		
What lessons were learned?		
What are we going to do? Actions/Decisions	Who	When



THE PPMR TEAM

PLANNING A PPMR: PARTICIPANTS

THINK ABOUT WHAT ROLES ARE NEEDED

- **Leadership**
 - Leadership engagement signals support of the PPMR process
- **Participants**
 - Have a vested interest in the topic
 - Want all roles, but not every person
 - Avoid having supervisors represent their team
- **Identify the PPMR Facilitator**
 - Impartial
 - Helpful to be knowledgeable



LEADING THE PPMR: The Facilitator

THE FACILITATOR'S ROLE

- 
- The background image shows a large, dense crowd of people from an elevated perspective. The crowd is composed of many small figures, some wearing blue shirts. In the lower-left foreground, a single person stands facing the crowd. In the upper-right, another person stands with their back to the crowd, gesturing towards them. The scene is set on a light-colored ground with long shadows cast by the figures.
- Encourage a relaxed atmosphere
 - Explain the PPMR process
 - Clarify the reason for the event
 - Provide guidance & direction
 - Keep the team focused
 - Environment of respect

SEEK TO UNDERSTAND...

Manage Flow of Events

Set Limits

Listening is Communication

Manage Interruptions

Stay on Point /On Time

A PPMR answers the question "What happened and why?"

True

False

In selecting a PPMR Team, the facilitator is best to be:

Lead Project
Manager

Impartial
Attendee

Any Team
Member



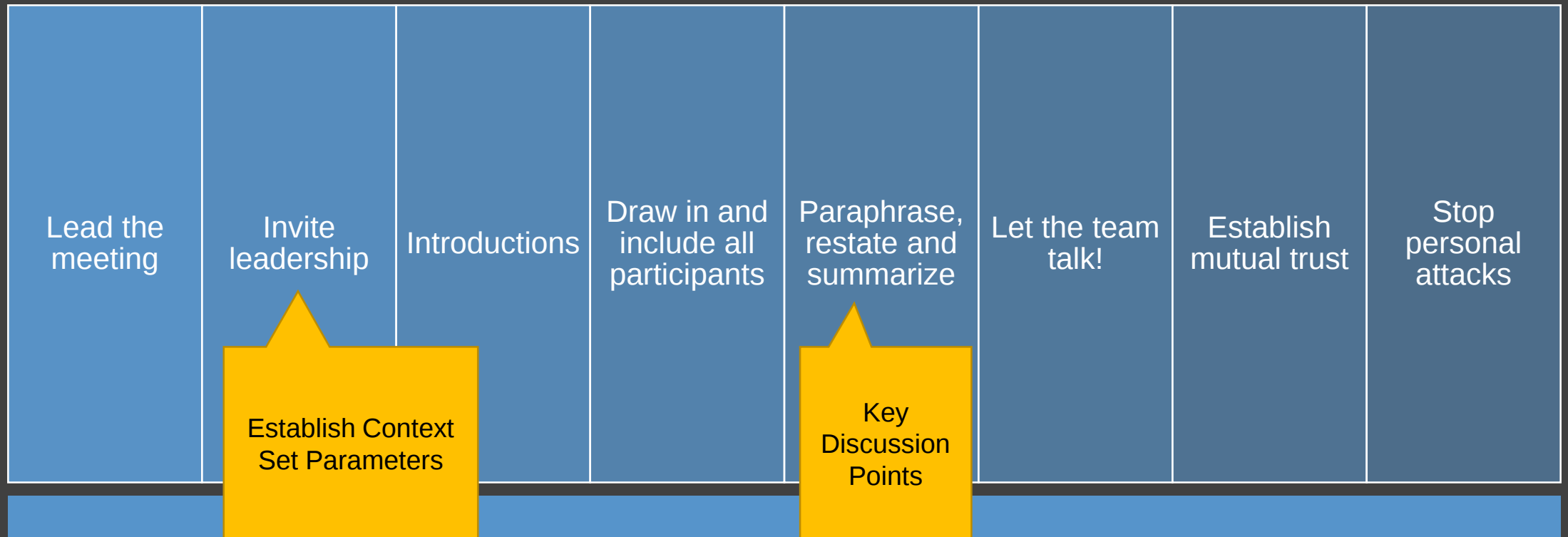
CONDUCTING A PPMR

A cartoon illustration of a young boy with dark hair, wearing a blue shirt, with his hand on his chin in a thinking pose. A thought bubble originates from his head, containing the text 'IS A PPMR APPROPRIATE?'.

**IS A PPMR
APPROPRIATE?**

- Recognizable event
- Repeating process
- Clearly defined starting & end point
- Team striving for a common goal
- Immediacy after the event

THE FACILITATOR'S ROLE



SAMPLE AGENDA

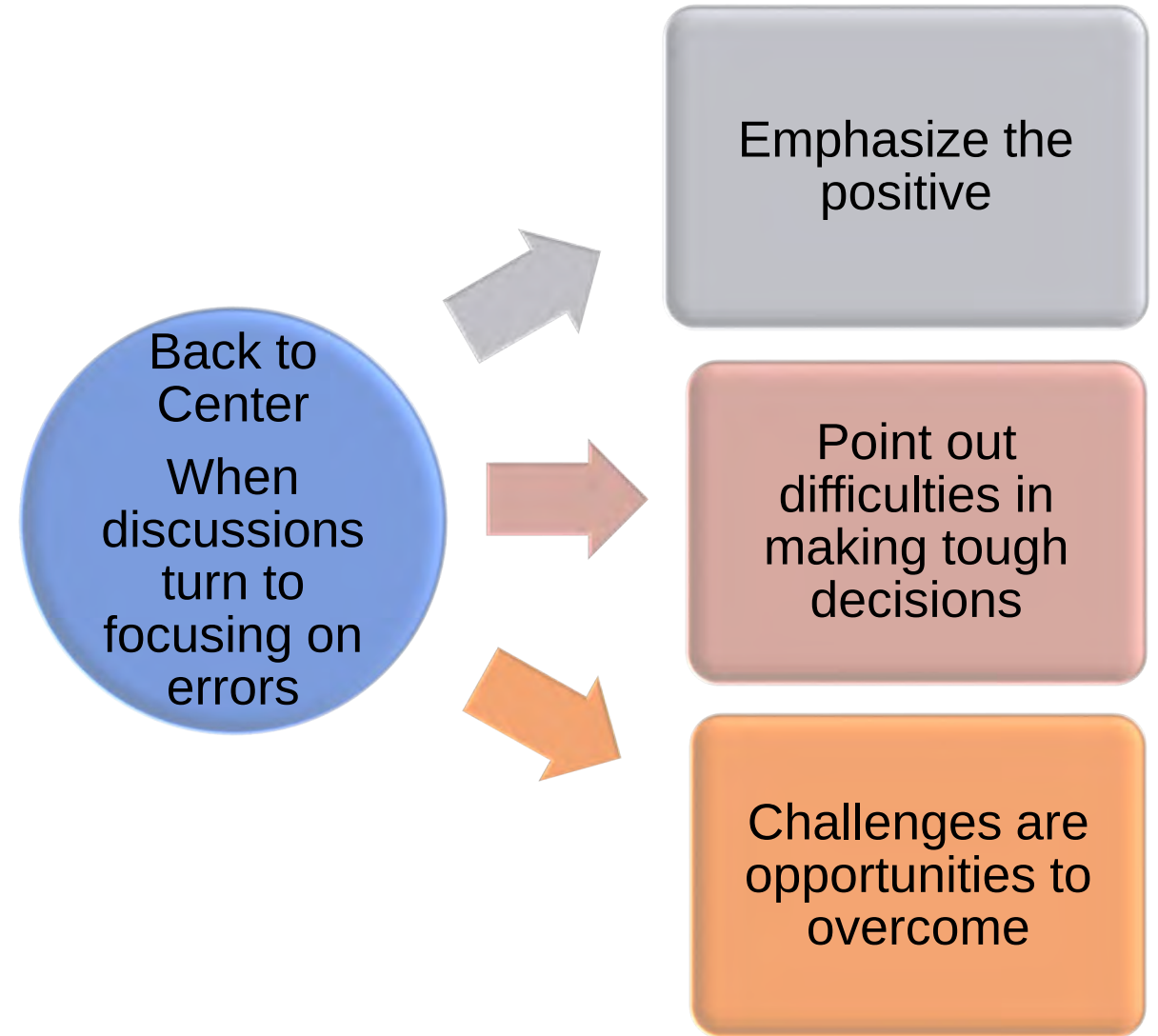
Attendees:

Safety Moment:

- ☐ Welcome
- ☐ Why are we doing the PPMR
- ☐ Introductions
- ☐ Review ground rules and concepts
- ☐ Review the 4 questions
 - ☐ What did we intend to do?
 - ☐ What actually happened and why?
 - ☐ What lessons did we learn?
 - ☐ What action will we take?
 - ☐ Action
 - ☐ Who
 - ☐ When
- ☐ How will we share this knowledge?
- ☐ Feedback on the PPMR process

SETTING GROUND RULES

- Learning not blame
- Speak openly & honestly
- Mistakes are valuable
- Diversity of ideas
- Tolerance & respect
- Anonymity
- Confidentiality
- Personal responsibility
- Sincerity & trust
- Time management





PITFALLS

- Don't wait until you have a problem
- Fact finding for the purpose of discipline
- Focus on big projects
- Focus only on failures and problems
- Generalizations rather than facts
- Exerting authority

Approach to the action plan:

- o Doing nothing with it
- o Large list that can't be accomplished

In your opinion, the most important ground rule for a PPMR might be:

Env. of Trust

Find Value in Mistakes

Learning Focused

All of the Above

FORM AS A GUIDE

PROJECT POST-MORTEM REVIEW		
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Project Overview:		
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Key Contacts:		
Objective:	Meeting Participants:	
Date:		
Location:		
What were the project objectives? What do we intend to do?		
What actually happened? And why was there a difference?		
What lessons were learned?		
What are we going to do? Actions/Decisions	Who	When

WHAT WERE THE PROJECT OBJECTIVES?

Each states their interpretation

Focus on the initiation of the task

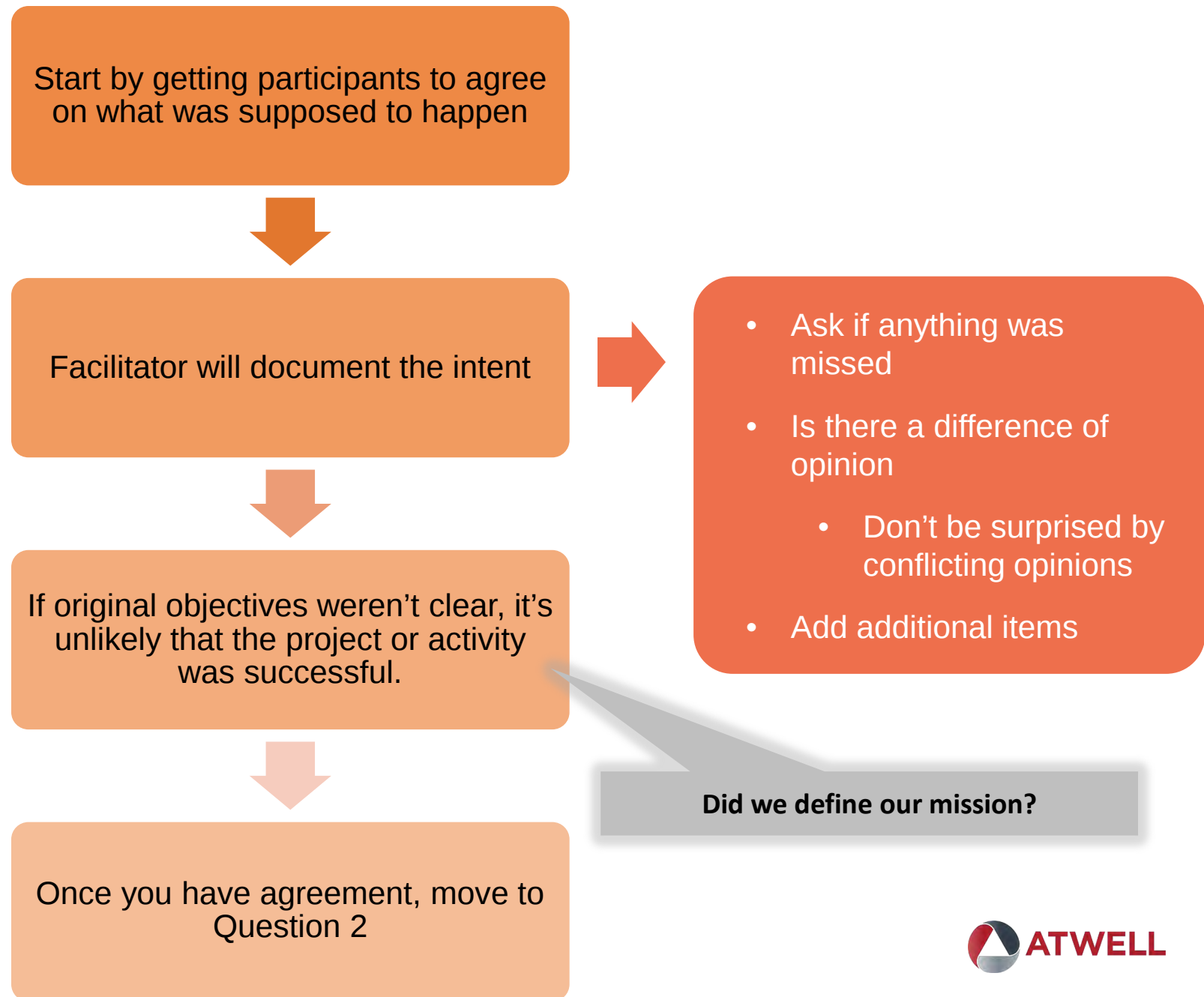
List every element of what was intended to be done

Not uncommon to have conflicting intentions

Facilitator will watch for:

- o Comments that are unrelated to subject matter
- o Jumping ahead

WHAT WERE THE PROJECT OBJECTIVES?



Conflicting intentions are common in a PPMR:

True

False

WHAT ACTUALLY HAPPENED?

WHY WAS THERE A DIFFERENCE?

Each participant states their interpretation

- Each focuses on their role in the event

What happened & how it affected participants' work

- Focus on the facts

Facilitator may support by asking for:

- Chronological order of events
- Ask for key events only

Pitfalls

- o Discourage going down rabbit holes
- o Discourage microscopic dissection
- o Do not gloss over details

WORKING THROUGH WHAT & WHY

Was there anything else that happened?
Versus: Was that the right thing to do?

- Ask open ended questions
- Facilitator should not say what was “good” or “bad”
- Keep the discussion at a level that is actionable
- Avoid generalizations, go for details
- Attendees may need to vent about the process/problem/project
 - Build time into the agenda if it will be an emotionally charged discussion
 - Prepare in advance for charged discussions

Remind people you will get into problem solving later in the process once everyone has been heard and all problems are captured.

In identifying what happened, the team wants to focus on:

The story

What went
wrong

The facts

WHAT ARE THE LESSONS LEARNED?

The goal is to adopt a course of action to improve the process.

Reinforce the good things!

- What did we learn from this event?
 - o What strengths should be sustained?
 - o What opportunities exist to improve?
 - o What actions do you want to take?

What lessons can be taken immediately into action steps?





WHAT ACTION WILL WE TAKE?

- Action plan: what, who and by when
- Simple solutions implemented immediately
- Process improvements for future events
- Buy-in on action plan
- Note
 - Complex items diminish likelihood of success
 - Learning process, not a wish list
 - Accountability on action items

ACTION PLAN SUMMARY

A successful action plan is owned by the group and driven by the facilitator.

Determine the action plan.
Agree on individual assignments.

Team takes ownership.
Driven by the Facilitator.

Utilize PPMR to communicate
action plan.

Knowledge gained from the
process is implemented

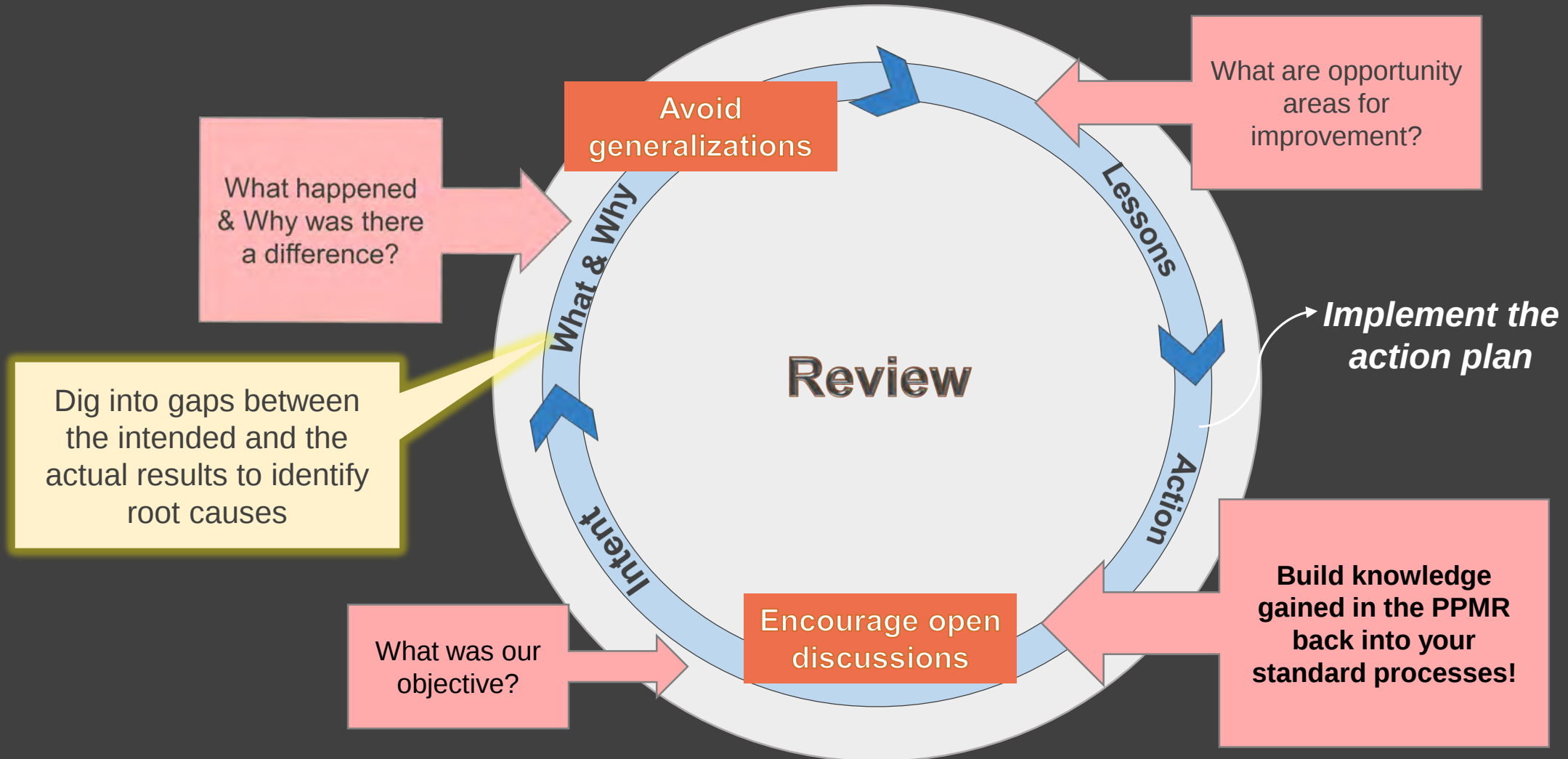
Think about maintaining
process improvements

IN CLOSING

Make closing comments:

- o Review and summarize key points
- o Review next steps
- o Identify what to expect
- o Thank participants for their contributions
- o End on a positive note linking to future improvement

PPMR CYCLE SUMMARY



What are some benefits of PPRM?



CONCLUSION

IN CONCLUSION

- The PPMR tool is simple to use
- Quickly and clearly define strengths & weaknesses
- Sheds light on what worked & what did not
- Prioritize improvements & implement
- Consider implications of lessons learned
- Who else in the organization can benefit from this learning?
- Don't wait until after what happened, happened – you can perform a PPMR anytime

What
happened
before what
happened,
happened?

"It's amazing what you can learn after
you've learned all that you think
there is to learn"

~Ray Hunt



QUESTIONS?

CONTACT INFORMATION

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