Lessons learned template

A lessons learned template records what happened, what it changed, and the conditions under which the lesson holds. This page gives you a filled register as a worked example, a blank register to copy, and a 60-minute review that ends in one transfer action rather than a long list.

60 minutes | 4–12 participants | Online and adaptable in person

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The outcome

The group records up to three evidence-linked lessons and assigns one transfer action with an accepting owner, a receiving team and a review date.

Before the session

- For trainers, project leads and facilitators reviewing a completed project or milestone. Use this kit when another team or future project needs the learning; use the retrospective kit for a recurring team improvement meeting.
- Invite 4–12 people who saw different parts of the work, a decision owner and someone representing the next project. Gather one success and one difficulty per person in advance. Ask for dates, artefacts or observations; redact client and personal details.
- Prepare the evidence log, one lesson record per candidate and an action tracker in a shared document. Agree who may see the notes. Send the prompts in advance, enable captions and offer written contributions or a pass. Do not use the workshop to investigate misconduct.
- Choose a bounded project or milestone. Have a neutral facilitator and a note-taker. The worked example is fictional: a team delivering an online customer workshop discovers that external participants cannot open its exercise document.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

The participant sheets come first so you can print one page per person. Your own facilitator section follows them.

- Evidence log — Use one copy per event.
- Lessons register — Use one copy per lesson, with a stable ID such as L-01.
- Transfer action tracker — Use one copy for the action chosen today.
- Facilitator run of show, reference tables, debrief questions and adaptation notes — for you, after the participant sheets.

Evidence log

Use one copy per event. Capture successful choices as well as difficulties. Record a reference people are allowed to access, not confidential source material. Leave unsupported claims as questions.

Worked example

Fictional example: an exercise was planned to start at 10:00. The session log records an eight-minute delay after external attendees reported access denied. The preflight checklist records only an internal-account test. We do not know whether all attendees had the same problem.

Project / milestone, date and event ID

What was expected? What actually happened?

Evidence reference and who can verify it

Effect on the work; what is still uncertain?

Lessons register

Use one copy per lesson, with a stable ID such as L-01. Store the records together where a future project can find them. A recommendation remains provisional until its supporting facts and practical limits are checked.

Worked example

Fictional L-01: before an online customer workshop, test each exercise link with an external attendee account. Evidence E-01 suggests the internal check missed a permissions restriction. A different login policy could also contribute. This recommendation does not establish that all technical risks are covered.

Lesson	Conditions where it holds	Recommended change	Accepting owner	Status
Lesson 1				
Lesson 2				
Lesson 3				
Lesson 4				
Lesson 5				
Lesson 6				

Lesson ID, project, topic and evidence IDs

Observation and likely explanation; an alternative explanation

Recommendation: when this situation occurs, do what?

Where could this lesson apply? Where might it not apply?

Record steward, review date and status: Draft / Checked / Superseded

Transfer action tracker

Use one copy for the action chosen today. Agree the first use with the receiving team. Track whether it happened separately from whether it helped. One small trial cannot establish that a change will work in every setting.

Worked example

Fictional A-01 / L-01: the facilitator agrees to add an external-access check to the next event checklist by 24 September. The event producer accepts the handover. Review on 30 September: was the check recorded, did attendees open the exercise, and what other access issues remained?

Lesson	Receiving team or role	First use	Review date

Action ID and linked lesson ID; exact change to make

Accepting owner, receiving team and required approval

First step, due date and first planned use

Evidence of use; useful outcome to look for; review date

Review result: not tried / tried / adopted / revise / stop; why?

Facilitator run of show

1 Agree what this review is for | 5 minutes

Say: “We are capturing learning someone else can use, not grading people. Today we will record up to three lessons and one next action.” Confirm scope, note access and the receiving project. Explain that observations, possible explanations and untested recommendations will be labelled separately.

2 Build the evidence log | 10 minutes

Allow three minutes of quiet writing, then seven minutes to group the pre-collected examples. Ask for what was expected, what was observed and an evidence reference. Include a success worth repeating. Do not read every entry aloud. Mark missing evidence for checking rather than treating confident recollection as proof.

3 Choose the lessons worth carrying forward | 10 minutes

In pairs, compare one success and one difficulty for four minutes. Each pair offers one candidate in at most 30 seconds. Use the remaining time to choose up to three that are relevant to future work and supported by a concrete observation. The decision owner resolves ties; keep other candidates in the log, not in a rushed discussion.

4 Write lessons with conditions | 15 minutes

Use one group per candidate; with four people, work as two pairs on at most two lessons. Spend nine minutes completing the lesson record and six reviewing together. Write the observation, a possible explanation, an alternative explanation, and a recommendation with a trigger and limitation. Example: test document access using an external attendee account before an online event; this addresses permissions, not every possible connection problem.

5 Choose one transfer action | 12 minutes

Spend four minutes selecting one small change to a checklist, briefing or routine. Use five minutes to complete the action tracker, including the receiving team, an accepting owner, a due date and evidence of use. Use three minutes to have someone from the next project explain how they would apply it. Record any approval needed; do not assign an absent person without their agreement.

6 Read back and plan the review | 8 minutes

Use four minutes to read back the lessons and action, two minutes for concerns or corrections, and two to confirm where the record will be found and when it will be reviewed. Ask: “What would the next team still need to know?” Label the record Draft until facts and ownership are checked. A written lesson is not yet evidence that practice changed.

Reference tables

Worked example register

Lesson	What we observed	Conditions where it holds	What we changed	Status
Send the joining link twice	Two participants joined twenty minutes late because the calendar entry was updated after the invite was sent.	When an invite is edited within 24 hours of the session.	Send a second message the morning of the session with the link and the start time.	Done
Name the decision owner before the discussion	Three decisions were reopened in the following week because nobody knew who had decided.	For decisions that change a date, a budget or a customer promise.	Record the decision owner in the meeting note template.	In progress
Ask for the evidence before the second meeting	A follow-up meeting repeated the first discussion because the data was not ready.	When the group cannot act on the current information.	Add a required data field to the meeting request.	Not started

Blank lesson register

One row per lesson. Leave the status blank until somebody has accepted it.

Lesson	What we observed	Conditions where it holds	What we changed	Status

How to judge a lesson

Use these four questions in the read-back step so each row can be checked in a minute.

Question	Why it matters
What did we observe, with a reference?	A lesson without an observation is an opinion, and opinions are hard to revisit.
What conditions made it true?	Most lessons hold in some situations. Naming them stops the advice being applied everywhere.
Who has accepted the change?	A lesson that nobody owns becomes a document rather than a change.
How will we know it worked?	Pick a signal before the next project starts, not after it ends.

Debrief and next steps

Questions for reflection

- Which statement is an observation, and which is still a possible explanation?
- What successful practice is worth carrying forward, and under what conditions?
- What would make this lesson useful to someone who was not in the project?

Adapt the session

- For remote groups, keep the evidence log visible and give instructions in chat. Offer voice, typing or a scribe; make cameras optional. Read key written contributions aloud without identifying private submissions.
- For four people, select one or two lessons and work in pairs. For 9–12, split into three groups of three or four and limit each group to one lesson. The 60-minute agenda relies on collecting examples before the meeting.
- For groups with unresolved disagreement, record competing accounts and nominate a fact-check owner. Do not force agreement on causes. If a sensitive complaint emerges, pause that topic and use the appropriate organisational process.

After the session

Within two working days, the record steward checks references and ownership, then shares the agreed records with the receiving team. At the planned review, record whether the action was tried, what was observed and whether to adopt, revise or stop it. If the next project has not started, set a check-in date rather than marking the action complete. Link the relevant lesson from that project's kickoff checklist.

Questions people ask

What is the difference between a lessons learned register and a retrospective?

A retrospective is a team meeting about a recent period of work. A lessons learned register is a written record that survives the project, and it includes the conditions under which each lesson holds.

When should a lessons learned review happen?

Within two weeks of the milestone or project ending, while people still remember the events. Later reviews tend to collect conclusions rather than observations.

How many lessons should we record?

Three to five well-evidenced lessons are more useful than twenty general statements. If a row has no observation behind it, keep it as a question until it does.

Who should own a lesson?

The person who can change the process, not the person who noticed the problem. Record the accepting owner next to the lesson so it has somewhere to go.

Use and sharing

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