

## Conducting an Effective Project Debrief

Debriefing can serve as an opportunity to reflect and learn about ourselves. For a team leader a post-project debrief is a tool to identify what worked well, what can be improved upon, and to brainstorm ideas on how to improve. Let's not forget it is also a time to rejoice in the successes and celebrate the outcome with colleagues.

As the facilitator your job is to plan and conduct the debrief session(s) to ensure a thought provoking, safe discussion. It takes work, and lots of it, to effectively pull off a project debrief that meets the intended goals. Always plan the project debrief work several weeks after the end of the project. The time lag gives emotional distance which helps put things in perspective a bit more clearly. The following guidelines will help structure the work.

**Prior to the Debrief Session.** Planning involves anticipating outcomes, getting clarity around what the team leader would like to gain from the session, and learning what the potential "hot buttons" there might be.

One way to anticipate what you will be dealing with in the session(s) is to ask ahead of time. Create a survey to distribute to the team members. Create a second survey for the customers or stakeholders.

**Create a team survey.** Ask the team about the tools, methodologies, deliverable quality, the team's ability to respond and work together, morale, contributions, and the customer's involvement. Ask what we could do better in the future.

**Create a customer/stakeholder survey.** Ask about the team's responsiveness, communication, if their needs were met, and what didn't go so well. Ask what we could do better in the future.

Deploy the surveys (many online tools, such as Zoomerang and Survey Monkey, make it easy) and collect responses. The responses should help create the roadmap in planning the debriefing meeting.

When creating the meeting agenda address discrepancies between the team and customer responses. Focus on issues that were repeated several times in the

survey responses. If you have a satisfied team and an unsatisfied customer, find out why.

Create questions to be discussed at the meeting. Consolidate the survey results to be distributed, along with the agenda, days prior to the debrief meeting. Participants are made aware of the results, what is to be discussed, and no one is blindsided coming in to the meeting about what is to be discussed.

**The Debrief Meeting.** Create rules on how the meeting participants are to conduct themselves. Have the participants help to create the meeting rules or, if time is short, present a list of rules. Consider rules addressing participation, confidentiality, honesty, no personal attacks, etc.

Encourage discussion around the pre-determined questions and ask participants to put suggestions into actionable activities.

Have a third party take notes on a flip chart for later actions. Deal with any personal issues after the meeting off-line.

Save time at the end of the meeting for celebration. Review everything that went well. Thank everyone for their participation during the debrief session and their hard work on the project. Talk specifically about how the meeting outcomes will be used. A little cake and punch never hurt either.

**After the meeting.** Deal with personal issues that surfaced during the meeting. If the issue can not be resolved directly take appropriate actions to put it to rest. This may involve escalating to a manager, getting Human Resources involved, or simply inviting the individual offsite for more discussion in a relaxed environment.

Put actionable items into practice where it is feasible. Without action participants will perceive their time as a waste and will be less likely in the future to participate or may become disengaged. Seeing actions implemented that are suggested by team members creates enthusiasm and engagement.