# Harvest Meeting Detailed Guideline

## 1 What is a Harvest Meeting?

A Harvest Meeting is a “Learning After” activity in the Knowledge Management Framework. The Harvest Meeting (also known as a “Retrospect”) is one of the most effective processes for capturing Lessons Learned from a project team, after the end of an activity, project, or project stage. **A Harvest Meeting can bring out the key knowledge and experience developed by a project team, and captures it for future reuse and for the benefit of future projects.** Although it has some features in common with the AAR, it takes longer, it goes into greater depth, it makes sure that each individual on the team has a chance to contribute, and it expresses the learning in terms of recommendations and advice for future activities and projects. By facilitating an in-depth dialogue within the whole team, knowledge can be identified that comes from the team interactions - knowledge that any one individual may be unaware of, but which the team as a whole knows.

## 2 Why hold a Harvest Meeting?

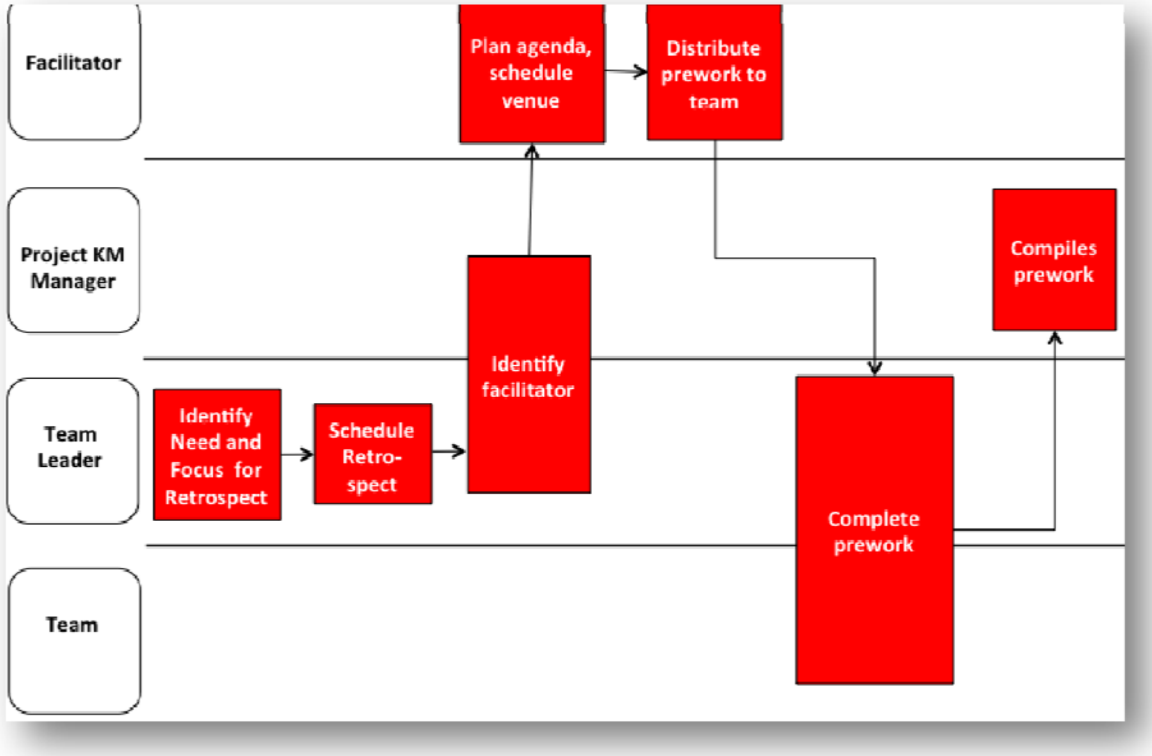
Harvest Meetings are a good way of summarizing and capturing what the team has learnt throughout the course of the project before it disbands. It is a good reminder for the team members present, as well as beneficial for those who will be taking on similar project in the future. The benefits of a Harvest Meeting are:

- Identification of valuable lessons.
- Enhanced team openness and cooperation.
- Achievement of closure at the end of the project.

## 3 How to Use a Harvest Meeting as a KM Strategy?

### 3.1 Harvest Meeting Planning

For the Harvest Meeting to be effective, you should do enough preparation. The planning process for a Harvest Meeting is as follows:




### 3.1.1 Project Harvest Meeting planning

As part of the knowledge management planning process, the project knowledge manager or team leader identifies the need for Harvest Meetings within the project, and **schedules them as part of the project plan**.

Don't try to conduct a Harvest Meeting by e-mail, it needs to be a face-to-face round table or video conference meeting.

Hold the meeting as soon as possible after a project is completed—ideally within a couple of weeks. Memories fade. If you wait too long, events become post-rationalized.

### 3.1.2 Harvest Meeting preparation

1. Invite the right people

The team leader requests that all relevant members of the team who were involved in delivering the project attend the Harvest Meeting. Attendees could include the team leader, all team members, the customer or client for the project, and all other key participants. A Harvest Meeting with more than about 12- 15 people is difficult, so if the extended team exceeds 15, then either invite just the core team, or hold separate Harvest Meetings for sub-projects. Project managers or project leaders from other project teams may also be invited, if they have a particular interest in learning from the project, but their involvement must be managed in a very sensitive manner to ensure their presence doesn't reduce the open flow of knowledge by the team that performed the project.

2. Appoint a facilitator

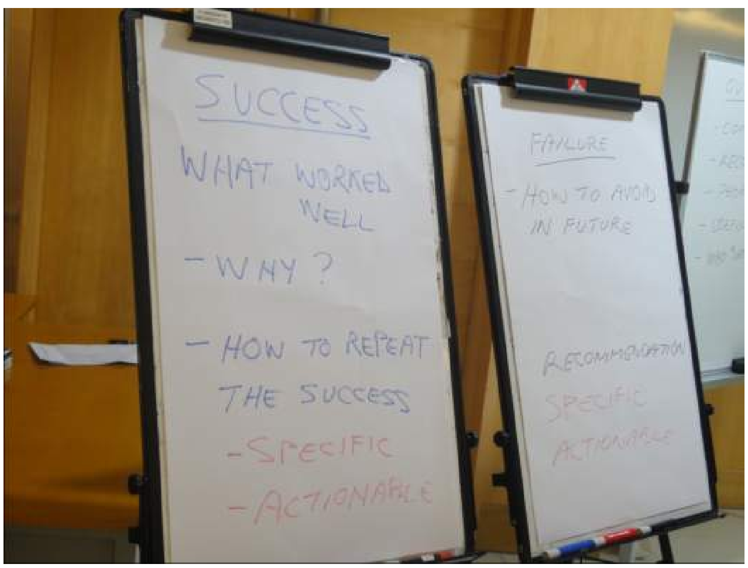
The team leader, in combination with the project knowledge manager, identifies an individual who was not part of the team to facilitate the Harvest Meeting. The facilitator should not be closely involved in the project, otherwise, the meeting will concentrate on "what we did" rather than "what should the next team do in similar circumstances." If the facilitator is very remote from the project, she or he may need to do some preparation (such as having discussions with key players). The facilitator needs to be familiar with the Harvest Meeting process and with the purpose of the event.

3. Confirm the venue and agenda

The facilitator chooses a suitable venue for the Harvest Meeting and compiles an agenda. The duration of the agenda depends on the number of participants, and the facilitator should allow 20 - 30 minutes per participant. If there are 10 participants, then the Harvest Meeting will take between 4 and 5 hours.

4. Workshop supplies

- 2 flipchart easels with paper: one is for the success, and one is for failure.




- LCD projector and screen
- Laptop for KM team with learning points template
- Room Set-up: "C" arrangement (open horseshoe to allow facilitator to walk in the middle of the tables – all attendees facing each other)

### 3.1.3 Collect the learning point

1. Compile the learning point

For a complex project, the facilitator asks the team members to identify project successes and project challenges before the event, so that the execution of the Harvest Meeting is effective and efficient.

To assist the meeting to focus on the highest priority items, the template below is issued to the attendees 1 week prior to the meeting. The project knowledge manager is tasked with organizing its completion. See section 7, Templates.

**Figure 1 pre workshop template**

| name of person | description of learning point (eg what happened) | was it a success or failure | impact to project (H,M,L) | transferability to other teams (H,M,L) |
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2. Combining the learning points and Priority Ranking

The project knowledge manager compiles the responses on the form, combining any duplicate learning points into a single description, and using their judgment to agree an overall impact and transferability rating for these combined learning points. The project knowledge manager then puts the learning points into priority order; the order in which they will be discussed at the Harvest Meeting. The priority ranking is as shown in Figure 2 below.

**Figure 2 priority matrix**

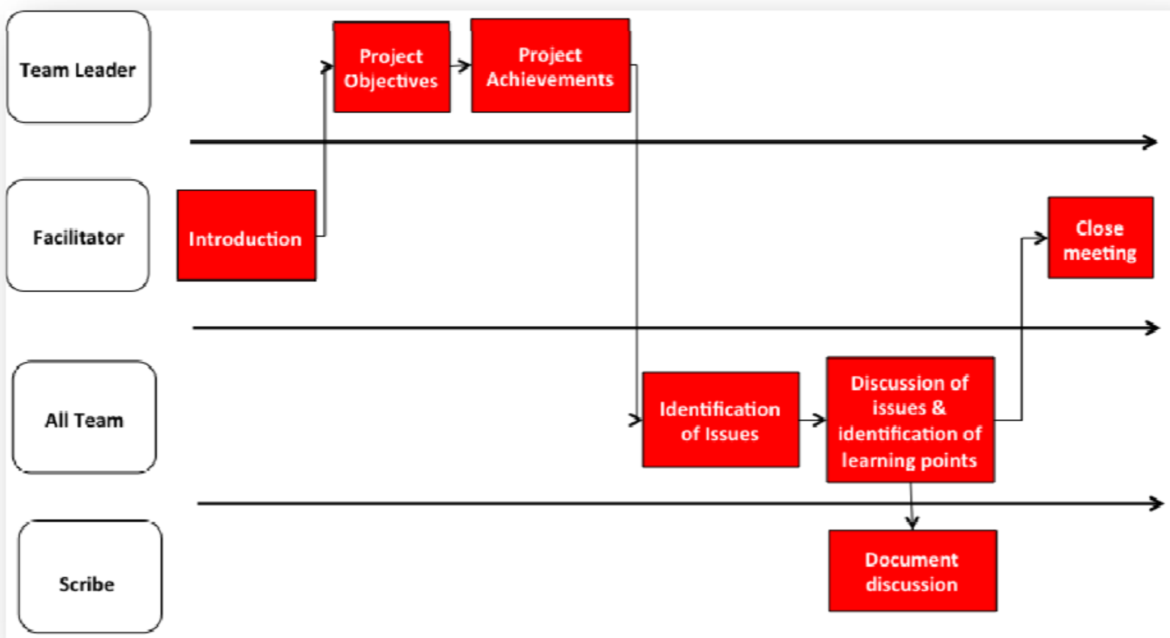
An example of the completed form is shown below. The right-most column shows how the learning points have been put into priority order.

| 序号 | name of person | description of learning point (eg what happened) | was it a success or failure | impact to project (H,M,L) | transferability to other teams (H,M,L) | priority for the retrospect |
|---|---|---|---|---|---|---|
| 1 | Liao Juan | the feature is Commitmented to deliver in 17th,but until the 22nd we can only really start the Building Block Integrate and Test, resulting in delivery delays | failure | H | H | 1 |
| 4 | Liao Juan | For complex features, initial investment is not enough, did not identify the design documentation can not guide the development of risk | failure | H | H | 2 |
| 5 | Liao Juan | Do simple design first, and clarify after making a clear enough understanding of the feature, and can find the SE design problem | success | H | H | 3 |
| 8 | Ye xiaojuan | Training within the group, both for the group members understand certain features, letting them to enhance the understanding or misunderstanding can be corrected | success | M | H | 4 |
| 9 | WU JIALIN | In the feature development process,there are still many ambiguities need to be clarified after a clarification stage.The first reason is the clarification is not done well,Another reason may be not put enough time to understand features early. | failure | M | H | 5 |

## 3.2 Harvest Meeting Process

The process of the Harvest Meeting is shown below.

**Figure 3 complete pre workshop template**




### 3.2.1 Step1: Introduction

The facilitator outlines the purpose, process and ground rules of the meeting. The facilitator makes it clear that the meeting is held to capture the lessons, in order to help future key activity and project teams, and not to evaluate the performance of the project team. The facilitator needs to reiterate that the purpose of the meeting is to make future projects run more smoothly by identifying the learning points from this project. The purpose is not to assign blame or praise.

The facilitator needs to encourage an atmosphere that allows participants the freedom to express opinions critical of anyone. If necessary, introduce "rules of the game." Particular care must be made to 'coach' the project team leader in advance of the session so that their participation doesn't influence the open exchange of knowledge.

### 3.2.2 Step 2, Revisit the project's objectives and achievements

The team leader reviews the objectives of the activity or project, presenting the original terms of reference if possible.

The team leader presents what actually happened in the activity or project, and what was achieved at the end, including, but not limited, to quality, cost and schedule performance. This statement of achievement is verified with the rest of the team.

It often helps to have the team leader to list the objectives in advance and have them posted on a flipchart to use to prompt the team for input. If this approach is used, be sure to encourage the team to modify and add objectives as they understood them for the project. Any differences may point to key learning areas to prompt for later.

### 3.2.3 Step 3. Capture the lessons learned

The facilitator then uses the pre workshop template and starts with the learning point that was determined to be the highest priority. The facilitator takes the issues one by one in order of priority. Always start with the good points! We want to build on best practice as much as we want to avoid repeat mistakes. It is best to start the meeting on a positive note.

When the facilitator conducts the meeting, she or he should do:

- Root cause analysis

The facilitator leads a team dialogue on each learning point to find the root causes of the success (or failure). For each learning point, do your best to get more context to help other team to understand. Steer participants away from giving opinions, but rather towards real grounded experience, by asking for specific examples.

- Recommendation

The facilitator leads a team dialogue on each one to find the root causes of the success (or failure) and continue the dialogue to identify the lesson. The lesson is expressed as advice for how the success can be repeated, or the failure avoided, in future projects. The team is asked to suggest actions to embed the lessons.

And the recommendation should be SPECIFIC, ACTIONABLE, RECOMMENDATIONS, The reader of the recommendation must be able to immediately take action based what they have read in the recommendation.

- Find the contact person - The facilitator and team identify a contact person from the team to answer any further questions associated with the lesson.
- Find the related documents or resources - The facilitator asks the team if they can identify documents which support the lesson, and which should be attached to, or referenced from, the database.
- Identify the informed person - The facilitator also asks the attendees if they know of anyone in the organisation who should be informed about this lesson.
- Appoint the person who will be responsible for informing the lesson

### 3.2.4 Making a record

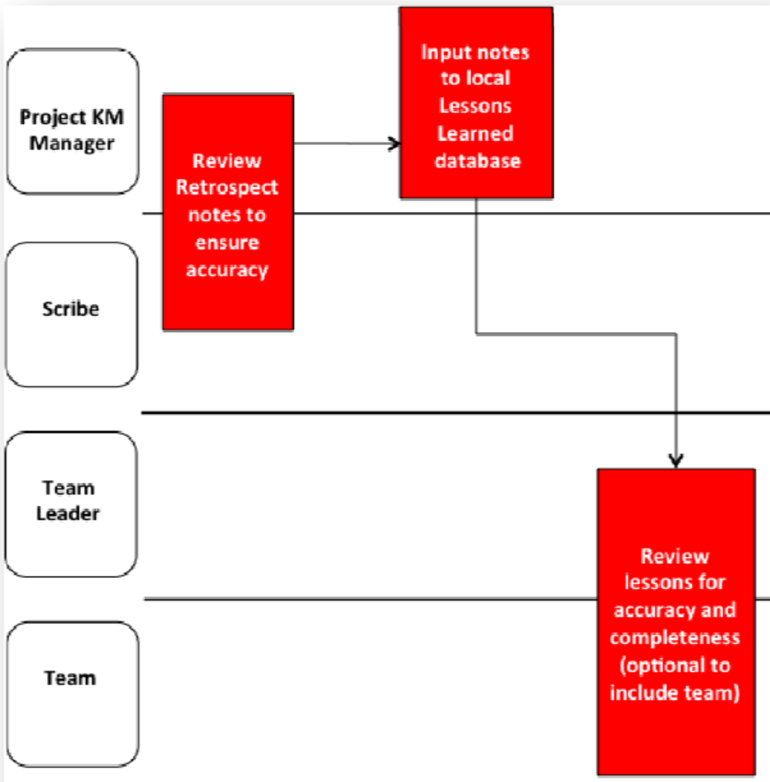
Throughout the Harvest Meeting process, the scribe takes detailed notes using the template in 7.2 Retrospect meeting note template. Consider using audio to record the event. Although this will take extra effort, it will be a valuable source of knowledge for the future and will help provide details in the documentation phase.

The facilitator brings the Harvest Meeting to an end by reminding the attendees that they will be required to validate the lessons that they are recommending being passed to other projects before they issue them.

### 3.3 Lessons Documentation During the Harvest Meeting

#### 3.3.1 Local Validation

Before an identified lesson can be acted upon or distributed, it must be locally validated by the team/team leader that created it. This is done after the Harvest Meeting and is done in three steps, as illustrated below.




Step 1. Review the revise the note

The scribe should record and document lessons arising from the Harvest Meeting carefully. The scribe needs to ensure that the documented lessons are of sufficient detail and quality to be useful to others.

Good lessons are specific actionable advice, phrased as recommendations for future teams, with enough context to be understandable. Each learning point identified in the pre workshop template should result in one lesson.

A recommended template for documenting lessons is below. The forms within the lessons template will be finalized as the input forms for the Lessons Database. The person completing the template needs to do so accurately and in sufficient detail for the next person reading it to fully understand the context and the recommendation being described.

This step involves the project knowledge manager working with the scribe to review the meeting notes and comparing what the scribe has written in the lesson template against what actually happened in the meeting. It is important that this step take place in order to ensure that the lesson has been captured and recorded accurately.

Step 2. Submit and store the lessons

The second step is to transfer the lessons that were captured during the Harvest Meeting in the lessons template and reviewed for accuracy and completeness in step 1 into the local Lessons Learned database. The project knowledge manager transfers the lessons from the template used for the Harvest Meeting into the local Lessons Learned database. Once this is complete, the project knowledge manager conducts their check to verify what has been loaded into the local Lessons Learned database accurately reflects what was agreed in step 1.

Step 3. Review the lesson by team leader

Once the lesson is entered into the local Lessons Learned database, the team leader (optionally this may be conducted by calling a meeting with the team that conducted the Harvest Meeting) reviews it for accuracy and completeness. Once the team leader or their delegate have completed this review the lesson can be marked as complete/final and it becomes an official part of the local Lessons database.

### 3.3.2 Follow-up Actions

After lessons have been validated, the team leader may hold a meeting with team members to determine whether specific actions should be taken to address any of the lessons.

Each action will be tracked by the project knowledge manager until it is closed out by the person that it has been assigned to. At that point the status of the action will be changed to ‘closed out’ and the close out date entered in the actions template.

### 3.3.3 Lessons Publication

After all the Harvest Meeting lessons have been validated and actions have been identified, the team leader, and the project knowledge manager review the Harvest Meeting notes and the actions templates to confirm who they will pass the lessons on to, and how they will do this. Some lessons may be passed on to other teams, and others may be passed on to practice owners.

## 4 When to hold a Harvest Meeting

Harvest Meetings should ideally be conducted within two weeks from the end of the project, when memory has not faded too much. It can be conducted as part of the project closeout celebration, which will help to set a positive tone for the Harvest Meeting, but bear in mind our qualification about possibly diverting people from a serious learning mode.

## 5 When not to use it

Harvest Meetings are useful insofar as the project team members are all present and the project completion is not too far away. In cases where you are unable to assemble the core project team members quickly enough, perhaps they have moved on or perhaps they deeply involved in another project, a limited retrospect will hold little value.

## 6 Roles

The roles associated with the Harvest Meeting process are as follows

6.1 The team leader is responsible for:

- Identifying the need and ensuring that the Harvest Meeting is held,
- Ensuring the project team attends,
- Identifying a facilitator, and
- If appropriate, inviting project managers or project leaders from other projects who need access to the learning.
- Completing the pre workshop template
- Presenting project objectives and achievements at the Harvest Meeting
- Reviewing lessons for accuracy and completeness
- Identifying lessons to be passed on and passing them on
- Taking action on lessons where appropriate

6.2 The project knowledge manager is responsible for:

- Identifying when Harvest Meetings are needed as part of the project plan, and
- Helping identify a facilitator. In many cases the KM team will provide facilitation.
- Compiling the pre workshop preparation and identifying the priority sequence of the learning points
- Reviewing lessons notes to ensure accuracy
- Inputting lessons into Lessons Learned database
- Identifying lessons to be passed on and passing them on

6.3 The facilitator for the Harvest Meeting is responsible for:

- Selecting a venue
- Compiling an agenda
- Facilitating the Harvest Meeting

6.4 The scribe for the Harvest Meeting is responsible for:

- Taking detailed notes
- Drafting the lessons from the Harvest Meeting
- Reviewing lessons to ensure accuracy, with project knowledge manager

6.5 The project team members are responsible for:

- Identifying success factors and challenge factors within the project
- Contributing to discussion within the Harvest Meeting
- Checking and validating those lessons for which they are the owner or contact
- Taking action on lessons when appropriate.

## 7 Templates

### 7.1 Harvest Meeting pre-workshop template

| **Name of person** | **Description of learning point (e.g., what happened)** | **Was it a success or failure** | **Impact to project (H,M,L)** | **Transferability to other teams (H,M,L)** | **Priority for the Harvest Meeting** |
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### 7.2 Harvest Meeting note template

| | |
|---|---|
| Learning point title | |
| Context (background) | |
| Recommendations | |
| Supporting documents | |
| Who should be informed about this recommendation | |
| Who will inform them about it? | |

### 7.3 Action Planning template

<table>
<tr><td>Lesson Title</td><td colspan="3">Short sentence</td></tr>
<tr><td>Owner or contact</td><td></td><td>Date submitted</td><td></td></tr>
<tr><td>Project or Department name</td><td></td><td>Topic</td><td></td></tr>
<tr><td>Context</td><td colspan="3">The Context in which this learning happened – any relevant background</td></tr>
<tr><td>Description of the event</td><td colspan="3">What actually happened?</td></tr>
<tr><td>Root cause</td><td colspan="3">What were the root causes?</td></tr>
<tr><td>Lesson identified</td><td colspan="3">The recommendations for the future – specific actionable recommendation</td></tr>
<tr><td>Suggested action</td><td colspan="3">How can these recommendations be institutionalised? For example, update a process, write a process, fix a problem, notify a person</td></tr>
<tr><td>Accountable person for action</td><td colspan="3">Name, role, department</td></tr>
<tr><td>Action Closure Date</td><td></td><td>Lesson Value (Cost, schedule or quality)</td><td></td></tr>
<tr><td>Attachments</td><td colspan="3"></td></tr>
</table>

# 8 Appendix

## 8.1 Facilitator Guidelines for Harvest Meetings

| | |
|---|---|
| Staying positive | Harvest Meetings are learning occasions, not opportunities for evaluation or critique. Negative or judgmental behaviors from team members can prevent a Harvest Meeting from being effective. The facilitator should watch out for any signs of criticism, or statements such as “I would never have done it like that”, or, “that was a silly decision”. The facilitator should intervene, for example saying “we are not here to criticize, but to capture our knowledge and learning for the future.” |
| Staying open | The Harvest Meeting will only deliver its objectives if the team leader and team members are open to learning and can have candid conversations. The team leader or facilitator should monitor for whether blaming or defensiveness are emerging among team members. If so, the facilitator should intervene by reminding the team that the focus of the Harvest Meeting is learning and that the team cannot learn if it is not safe to discuss gaps in performance or mistakes without critique, or if team members are not open to discussing failures along with successes. |
| Talkative versus Quiet | Notice whether attendees are all contributing to the discussion, or whether some attendees are quiet while others are dominating the conversation. Balance team members’ contributions to the conversation to ensure that everyone actively participates. |
| Single conversation | The team leader/facilitator should discourage side conversations. |

## 8.2 Survey questions for the end of the Harvest Meeting

It is useful for a team to reflect on the effectiveness of its Harvest Meetings and to discuss how to improve them. The following two questions can be used when reflecting upon a Harvest Meeting that has just been conducted:

1) What did you like best about the Harvest Meeting? What aspects of the discussion did you find most valuable? Please be specific.

2) What can we change to make the Harvest Meeting process even better for our team? Please be specific.