



Facilitating Retrospectives

TEAM MEETING GUIDE

> Your first step to capturing insights that will improve future work

Retrospective Meeting Guide

Retrospective meetings help teams learn and adapt through the process of reflecting on completed projects, identifying what went well and what didn't, and capturing action items to improve future projects.

Frequency

- Once per project, when the project is completed

Attendees

- Meeting facilitator (most often a project manager or team leader)
- Team members involved

Process

- **Meeting facilitator opens the meeting**

- Thank everyone for their hard work
- Celebrate the success of a completed project
- Relay any praise from clients or external stakeholders
- Explain how the meeting will work

- **Work through the four quadrants of the project retrospective**

- 1. What went well?**

Ask the group to identify things that went well during the project—this can include very little things, such as “discussing design feedback over coffee rather than in the office got me thinking about the design a little differently” to very large things, such as “the approval process was seamless and was a great collaborative effort”

- 2. What could have gone better?**

Ask the group to identify things that could have gone better during the project—again, these can be small or large (“I had difficulty logging into a web-based tool” to “the client’s feedback was not clear, resulting in multiple rounds of revisions”)

- 3. What we should do more of?**

Ask the group to list new things they tried throughout the project that were helpful and could be used to improve future projects

- 4. What we should do less of?**

Ask the group to identify things they tried throughout the project that were not helpful, took up too much time for the benefit it provided, or should generally be avoided in future projects



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Process (continued)

○ Identify action items from each of the quadrants

- As the meeting moves along, the meeting facilitator should take notes on tasks that emerge from these suggestions and feedback
- These are not tasks related to the project—rather, they are items that should be completed to make future projects run more smoothly

○ Wrap up

- Recap the action items and assign the tasks that are assignable (the ones that need to be completed by someone before the next project)
- Thank everyone again for their time and effort

THINGS TO KEEP IN MIND

There are different ways to run this meeting and you can experiment to see which works best for the team:

- Verbally discuss each quadrant one at a time
- Draw the four quadrants on a white board and take 10-15 minutes for each person to write responses on sticky notes; after time is up, place each note in the appropriate quadrant and go through them one by one
- As the facilitator, be sure you're participating as well—your feedback is necessary
- If people are having difficulty coming up with responses for a particular quadrant, feel free to provide guidance—you can walk through the project step-by-step to see if calling out tasks will help jog a memory, or you can help remind the team of things that happened during the project

Happy Strategy brings a human-centered approach to developing inspired, engaged teams.

We help teams like yours explore and refine project management best practices, like facilitating retrospectives. To learn more about our process or schedule a complimentary conversation, email julia@thehappystrategy.com.

