

## **De-Briefing A Project or Event or Situation** by Will Phillips

Here are the design parameters that help make a debriefing a learning activity. Doing good debriefings and disseminating the insights quickly and deeply throughout the organization are one of the sure signs of a learning organization. An organization that learns quickly and applies those learnings has one of the strongest qualities for strategic success that it can fully control. As opposed to other qualities such as the strength of the economy which it has little control over.

Learning how to do what you do better is likely to be even more critical in a knowledge based organization than in a traditional manufacturing or capital based organization. Knowledge based organizations which have not learned how to learn simply become repositories for past learning.

The problem in conducting a debriefing successfully is that it is a little bit like taking out your own appendix. You can learn the steps, but the fear prevents a successful operation. Having a designated debriefing facilitator who is trained makes the process much easier and much more successful.

### **Purpose**

Define and announce the purpose of the debriefing in advance of the session.

For Example: "The purpose of the upcoming debriefing is to learn from what we have just completed so that we can apply those learnings to make the next cycle better. Only by doing this can we stay healthy as an organization. You are invited to share your perceptions with fullness and honesty in the debriefing. At the same time you are expected to maintain mutual respect for everyone involved."

In the session be sure and ask (with depth) if any one has any questions, doubts, disagreements or additions or changes (QDDAC) with the purpose. If so, dialogue on them and decide which to address in fine tuning the purpose of the session.

### **People**

Invite the right people.

- The planners and designers.
- Those who exercised authority over the project or event.
- The doers who did the work.
- The experts who advised.
- The users or customers who experienced the results. If they are not there in person, bring their feedback.
- Any other stakeholders not included.

- The ideal size is 5-12. However, with thoughtful and skilled facilitation you can involve two dozen or so. Do not limit the attendance for efficiency if this means leaving out the right people. Sometimes one or two may be invited more for their education than their contribution. They learn not only the specifics of the topic being debriefed, but more importantly they see demonstrated that this organization openly and constructively reviews what it does and learns from it. This strengthens a healthy organizational culture.

### **Process**

Generally the project leader would call the meeting. However, it is important to have some one else facilitate the meeting for two reasons:

- This allows the leader to participate fully in the substantive part of the agenda without worrying or focusing attention on the process of the meeting.
- Most leaders will have a tendency to be defensive as the process proceeds since it may feel like criticism. One touch of this defensiveness and the climate is severely impacted.
- If at all possible schedule the meeting when the project is about 95% completed. Otherwise hold the meeting close on the heels of the activity being de-briefed. If you wait until it is all wrapped up and cleaned up, there is a tendency for participants' attention to have shifted to recovery or to the next project. Waiting also lets the details disappear.

### **Preparation**

This means announce the purpose in advance. Schedule the times and place of the meeting. Have the obvious data ready to pass out in advance. This might include customer reactions, costs, shortfalls, comparisons to similar projects/events, etc. Encourage the invitees to submit requests for the obvious information so it is prepared and distributed in advance.

The generic task is to identify all the potential areas of improvement. This includes improvements for the end users, for customers, for the creators, for the sponsors, etc. Also improved effectiveness and improved efficiency and improved working conditions. The task definition can be announced to all participants in the Preparation.

You could also ask participants to think of the three best and the three worst parts of the project. They might also consider the following things if they are appropriate to the individual project:

- Safety
- Teamwork
- Resource Allocation
- Morale
- Relationships between People

- Decision Making
- Innovation
- Flexibility
- Legal Issues
- Attainment of Milestones
- Financial Results
- Time

Allow enough time. At least two hours. Ideally two sessions of two to four hours each separated by a night's sleep. The night allows a whole different level of depth to occur in the debriefing. Actual studies in creativity have shown the 80% of the best ideas occur after a night's sleep. Don't separate the two sessions by more than a day or so or momentum is lost.

### **Climate**

Set the climate of the sessions. What are the ground rules? For example: Honesty and full openness; mutual respect. Avoid niceness, blaming, discounting and attacking. Do not avoid an area just because it will be uncomfortable to explore. Do not shoot the messenger. Driving out fear from the process is the ultimate goal.

### **Suggested Agenda**

Review the purpose, task and ground rules.

Do an individual and team accumulation (description attached) on any QDDAC on the definition of the purpose, task or ground rules.

Follow with appropriate dialogue to address the issues. The first time you do this it may take longer than you wish, but it lays the foundation for the success of the debriefing. This individual and team accumulation gets everyone warmed up for the more serious and deeper one which follows next.

Do an individual and team accumulation on the Task: Identify all the potential improvement points in the project/event. The team accumulation is best done if it is written on flip charts and posted for all to see. Alternatively each point can be written on a sheet of paper and posted on the wall. When all the points are out and listed, you can begin arranging them into categories.

Now its time to prioritize the categories. One quick way is to give everyone 3-5 votes in the form of colored dots. You could use different colors for the different functions people played on the work. Everyone now posts their "votes" next to the most important items—the ones which would make the biggest difference if improved.

Now the deliberation begins. This is not seeking solutions--yet. This is the dialogue so that everyone knows what the various points listed mean; what their impact was. Begin with the ones with the most "votes." Try to address whole categories rather than individual issues.

Now is the ideal time to sleep.

Next session. Brainstorm improvements and list them.

Now dialogue on these and select the ones to adopt. During this dialogue insure that everyone learns from the customers/users; the designers learn from the implementers; the top level people learn from the front line people and that learning occurs across functional specialties.

Now assign the follow up: What, How, Who and By When.

Finally evaluate the debriefing process---so the next one can be better designed and led. Assess both the value of the learnings, the potential effectiveness of the embedding process and the climate of the debriefing.

Now have a celebration!

### **Follow Up**

The impact of the follow up depends on clear decisions on how to use the insights gained. This includes spelling out who is responsible for seeing that each insight is disseminated quickly and put into use. An Action Planning Form is at the end of this Briefing to help you thoroughly think about the action.

- Collect a description of the decisions in a binder and share it widely.
- Schedule a review to see how well the insights are being applied.

### **Individual & Team Accumulation**

Purpose: To give everyone time to think, space to listen and opportunity to speak. This process builds participation, honesty and avoids group think. It can give much more depth to the topic. Especially powerful when the topic is complex, conflicted, sensitive or confusing.

#### 1-Define The Topic

- What are the key elements of a successful program?
- What is causing the delay in this project?
- What do you think of the proposed solution?
- What are all the ways to improve projects like this one?

## 2-Individual Thinking And Accumulation

Have everyone:

- Write an exhaustive list in response to the topic.
- Write one item at a time-a key word or phrase is fine.
- Describe what is happening; not what should happen.
- Work individually and in silence.
- Be 100% honest; this list is for your eyes only.
- Wait until 70-80% of the participants are finished writing. Then go to step 3.
- Those not finished can continue adding items to their list.

## 3-Team Accumulation And Thinking

Have everyone:

- Say one item at a time.
- After speaking, call the name of the person to their right.
- Record each item as it is spoken. Ideally on a chart so everyone can see it.
- No discussion until everyone is done.
- Ask for clarification if needed. Less than 1 minute to clarify.
- Keep going round robin style until everyone is "dry".
- Maintain mutual respect-absolutely no discounting, commenting, etc.
- Start with issues in your back yard, expand to others and the whole organization.

Use This Technique To:

- Collect information, ideas, evaluations, etc.
- Get stakeholders input to changes or decisions.
- Surface ideas for making improvements.
- Evaluate a meeting.

Caution:

This is a time consuming process. Use it sparingly or abbreviate the formality when less depth is desired.

### **Action Planning Guidelines**

Ideas without implementation produce no results. Action plans without ideas may produce the wrong result. Spelling out an action plan will harness your ideas to implementation.

If the action planning is postponed, decide who will be in charge of convening a follow up meeting to decide on the action plan; where will the meeting be? When? Who will the action plan be communicated to? By whom? In other words, don't let inaction become the action.

If there is not agreement to follow up, then make an above board decision not to follow up.

The Action Plan should include:

- What is the problem or opportunity or issue to be addressed?
- What is the desired result?
- How? What strategies, actions and activities are needed to produce the result?
- By when will the result happen ?
- Who will take responsibility to lead this effort?
- Who else is needed to work on this task?
- Who must approve of the solution or decision?
- Who should have input to this task?
- Who should be kept informed as this task progresses?
- Who should be informed on the outcomes of this effort?
- Required Resources?
- Any constraints on what this task should not address?
- What barriers could block delivery as promised?
- How will you proactively address the barriers?
- How will we assess this action plan's success?