

LESSONS LEARNED REVIEW INSTRUCTIONS

Objective

The Lessons Learned (LL) Review is focused on assessing how the capture and proposal teams and the business development process worked on a given pursuit. These are normally accomplished as two separate reviews. The proposal-focused review should occur shortly after proposal submission. The capture-focused review should occur shortly after contract award and a debriefing by the customer. These reviews should be done in a timely manner to get the best feedback and the most candid input.

The goal for the LL Review is to discover what went right on the effort and what needs improvement for future efforts. These ideas and thoughts need to be captured and applied to ensure that needed improvements are incorporated into subsequent opportunity pursuits.

The Lessons Learned Review is an important component of process management. It is recommended that a review be done for each major proposal, and that improvements to the BD process be considered as these reviews are completed.

Responsibility

The capture and proposal managers should schedule the review. Capture and proposal core team members should be involved in performing the review.

The review should be scheduled as a milestone in the proposal schedule. It should not be scheduled as an afterthought or simply a formality. Often specific lessons learned during the proposal can be incorporated into the Capture Plan prior to award. Once recognized and corrected, these lessons are often key factors in executing a seamless transition plan from submission to award.

Resources

There are additional tools to assist in developing lessons learned information. These address both customer feedback (award debrief) and internal feedback. These reviews should be used to make adjustments to the process as part of a quality control and continuous improvement program.

- **LL Review Team Instructions** – This document, providing guidance on the objectives, responsibilities and resources for conducting a LL Review.
- **Lessons Learned Planner** – A planner for setting up the review and managing its progress. The capture manager is then responsible for representing the team on formal process improvement recommendations before management.
- **Lessons Learned Survey** – The process activities and milestones are examined as the basis for the White Team Reviews. This form is to be completed by participants before the review meeting and can be used for both the proposal-focused review and the capture-focused review.
- **Lessons Learned Database** – Provides a means of recording, managing, tracking, reporting on, and resolving those issues that are identified during LL Reviews.

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In addition to these resources, other materials are available to assist in conducting the review:

- Color Team Review Debriefs
- Capture Plan
- BD Process Guide
- BD Process Model
- Proposal Management Plan
- Customer Questions / Notifications
- Final Proposal Revision
- Customer Debrief

Best Practices

The Lessons Learned Review is considered one of the critical review steps in the BD process. Therefore, like other reviews it should be scheduled in the overall pursuit schedule.

Lessons learned comments/action items must be **documented and tracked** to resolution to ensure that BD process improvements are actually implemented. It is recommended that the following data be identified for each lessons learned issue identified during the review:

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|------------------------------------|-------------------------------|
| ▪ Title of issue/observation | ▪ Activity/step affected |
| ▪ Submitted date | ▪ Date completed or closed |
| ▪ Priority of importance | ▪ Status of issue |
| ▪ Proposal name | ▪ Description of issue |
| ▪ Proposal number | ▪ Source of issue |
| ▪ Responsible or lead organization | ▪ Policy or guidance document |
| ▪ Assigned due date | ▪ Expected/required outcomes |
| ▪ Category of issue | ▪ Observed outcomes |
| ▪ Business development phase | ▪ Recommended actions |

Effective BD lessons learned/continuous improvement programs require that the **BD process have a designated “owner”** that is responsible for ensuring that process improvements are routinely implemented into the process and then institutionalized within the organization.

Likewise, the **lessons learned database must also have a designated “owner”** that assists the process owner by managing the issues until each is resolved.