Rethinking Lessons Learned in the PMBoK Process Groups: A Model based on People, Processes and Technologies

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Propósito Central do Trabalho
Dealing with lessons learned is a complex issue that involves people, processes and technologies in any organization. Even following the recommendations of the main project management methodologies (PMMs), literature points out that the use of lessons learned is limited in projects. Project managers and team members have difficulty for learning from project to project due to a set of reasons. One of these could be the cursory way that PMMs cope with lessons learned. In fact, the lack of a prescriptive approach to deal with lessons learned in the main PMMs is a gap in literature. PMBoK, IPMA and PRINCE2 demonstrate a theoretical concern about lessons learned, but successful reports about the managing of lessons learned using these guides are still missing in literature. Although lessons learned processes such as storage, capture and dissemination are well known and widely used in large project-based organizations, some studies report that learning throughout the project is not registered in knowledge repositories. Moreover, team members and project managers are not sufficiently motivated to share their knowledge. To face the challenge of managing lessons learned in PMMs, the aim of this research is to introduce a new model (Ballistic 2.0 which stands for Ba Lessons Learned Information Technologies 2.0) to manage lessons learned in PMBoK process groups. This study used literature to establish the links among Web 2.0 service models (Shang, Li, Wu, & Hou, 2011), lessons learned processes (Weber, Aha, & Becerra-Fernandez, 2001) and methods (Schindler & Eppler, 2003), the interaction among project members (their shared context) (Nonaka, Toyama, & Konno, 2000) and Project Management in PMBoK (PMI, 2013).

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Lessons learned approaches have received little attention from project management researchers and are underrepresented in literature (Jugdev, 2012). Although this subject is a concern in the main project management methodologies (PMMs), research has found gaps in PMMs. Wells (2012) found that many practitioners (47.9%) rated the benefits of PMMs as low and considered that PMMs are unhelpful. This fact indicates that PMMs are using an approach that is out of phase with the needs of current projects. Of all issues covered in PMMs, lessons learned seem to be one with room for improvement. Jugdev (2012, p. 19) states that “PMBoK defines lessons learned narrowly, primarily as a set of administrative, documented outputs pertaining mainly to the closeout phase.” In fact, PMBoK seems to ignore the relevance of both knowledge management processes such as capture, storage and dissemination, and lessons learned methods (e.g. project review, after action review and postcontrol). PMBoK lacks a prescriptive approach about lessons learned. According to Koskela and Howell (2002, p. 2), “A theory of project management should be prescriptive: it should reveal how action contributes to the goals set to it.” To adopt a prescriptive approach to address lessons learned in PMBoK, one should focus on people, processes and methods, and technologies that can crosscut all PMBoK process groups. PMBoK can be also characterized as Project Management 1.0 (PM 1.0), since “it is not agile, it does not engage all available knowledge, and it is viewed as operational — not strategic” (Levitt, 2011, p. 7). In addition, “the detailed work breakdown and inflexibility that are intrinsic to the PMBoK philosophy of detailed, centralized planning and control of large, lengthy projects have proven to be excessively burdensome and unresponsive.” In this context, a more adequate approach needs to emerge to face the challenges imposed by current dynamic projects. Project
Management 2.0 (PM 2.0) is characterized mainly by autonomy and agility, which can meet the needs of team members and project managers (Levitt, 2011). The adoption of Web 2.0 technologies, integrated with traditional lessons learned processes and methods could be a way to make the PMBoK guide more agile and flexible. In this context, instead of considering PM 2.0 as surrogate for extant project management, it should be seen as complementary. The proposal of a new model to manage lessons learned in PMBoK process groups is the theoretical contribution to the state of the art. This study establishes links among Web 2.0 technologies, lessons learned processes, the interaction among project members (their shared context) and Project Management in PMBoK.

Resultados e contribuições do trabalho para a área
Ballistic 2.0 intends to fill a gap in literature concerning the lack of a theoretical model regarding lessons learned. It is supported by existing literature instead of being built from scratch. Moreover, it purifies consolidated lessons learned processes by adapting them to Web 2.0 technologies. Ballistic 2.0 adapts and extends the model of knowledge creation proposed by Nonaka et al. (2000). Web 2.0 service models extend the shared context (ba). Therefore, Ballistic 2.0 is in line with Project Management 2.0, encouraging modern project managers to introduce emergent technologies in their projects. In the PMBoK, initiating process group is the moment to promote ba. Originating ba and dialoguing ba should be encouraged if project members share the same physical place. In addition, systemizing ba and exercising ba can complement the search for lessons learned in this kind of project. On the other hand, global projects should use systemizing ba and exercising ba due to the difficulty to make face-to-face meetings. Using these types of ba, project members are able to capture explicit and tacit knowledge in both types of projects. The project management plan is defined in the planning process, as well as the project documents that will be used throughout the project. This is an iterative and ongoing process, for it should be revisited whenever new information is obtained that requires changing the plan. The four types of ba supported by the exchanger, aggregator and collaborator Web 2.0 service models are encouraged in this phase. These Web 2.0 service models will support a clear communication with stakeholders, mainly with the project team who are responsible to deal with the lessons learned. Several core tasks including acquire, develop, manage project team and distribute information compose the execution phase. Specifically, Web 2.0 service models can support the task of distributing information. Encouraging individual and collective interactions can facilitate the comprehension of the distributed information. New lessons learned tend to emerge from these interactions, which can be stored in the Web 2.0 technologies such as wikis and blogs. The lessons learned dissemination process (i.e. distributing information) could be also implemented using corporate social networks, RSS and microblogs. In the monitoring and controlling phase, project managers can use Ballistic 2.0 to create more assertive control processes in projects. Adjustments to budget, timeline, or the desired end-product are often necessary to address unforeseen circumstances. Project managers need also keep stakeholders up to date on progress and team performance through reports and on-going documentation. Web 2.0 tools facilitate the access to the team quickly find the last adjustments in the project. Moreover, Web 2.0 technologies support control stakeholder engagement as in the historic log in a wiki, number of posts and comments in a blog or microblog, and active participation on corporate social networks. The closing phase can be the last moment to capture lessons learned. Ballistic 2.0 model supports project managers by integrating lessons learned processes with the shared context by team members and the Web 2.0 service models. It is time to create an environment to perform the four types of ba using both individual and collective interactions. In addition to the implications of Ballistic 2.0 in each PMBoK process group, we recommend that project managers use the project review method to capture new lessons learned in the end.
of each process group. To do this, the collective type of interaction is recommended since individual interactions should be accomplished during the execution of each phase. Therefore, Dialoguing ba and Systemizing ba should be explored to implement the project review method. Project managers should also encourage the process of factoring lessons learned to the best practices. In the situation where there are number of lessons learned, selection of best practices could ease up transfer of key messages.

Referências bibliográficas