

Leadership Insight

Retrospectives for better performance

By Paul Field

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January is a time for looking forward: we make plans for the year, set goals and make resolutions. Sometimes we're building on what we achieved but sometimes we find we're setting similar goals and making similar resolutions to last year. Either way, it's worth taking time to review what happened over the last twelve months so we can learn what helps us succeed and what gets in our way.

Retrospectives

A retrospective is an activity that looks back over a period of time to understand what happened and to generate insights and learning that produce more success in the future. You can do a retrospective on your own, with a team or even with a whole department or company. You can spend an hour or you could spend a day, and there are many formats you can use. In this article, we'll look at a retrospective format designed to span a year and that you can do yourself or with a small team.

Being non-judgemental

The most important characteristic of a retrospective is to be non-judgemental. When I run team retrospectives, I often introduce Norman Kirth's Retrospective Prime Directive:

Regardless of what we discover, we understand and truly believe that everyone did the best job they could, given what they knew at the time, their skills and abilities, the resources available, and the situation at hand.

Discussing this statement sets a tone where we believe people were trying their best, so there's no point assigning blame. However, there are reasons why people doing their best don't always create a successful outcome. For example, they didn't know some critical information, they lacked certain skills or they weren't given the resources they needed. And, in a high-performing team, everyone can learn from those reasons and take action in future situations.

If you do a retrospective on your own or with the help of a coach, it's still important to be non-judgemental. There may be things you wished you'd done differently and you may want to blame yourself or others. If instead, you can look at the facts of what happened, forgive yourself and others and look to the underlying causes instead, and then learn and act differently in future, then that is wisdom to be celebrated.

Learning from the last year

Here's a process for looking back over the last year and learning from what happened. Just follow through each step and *write down* the answer to each question. Feel free to add extra information that comes to mind or to skip questions that don't seem relevant to you.

I'd probably spend 1/2 day minimum doing this with a team; as an individual you can do it in a couple of hours. You can make it longer or shorter by answering the questions in more or less depth or by skipping some questions if they don't seem relevant.

Also, as an individual, it can be very helpful to have someone else ask you the questions (plus a few of their own), so consider pairing up with a colleague, or getting a coach to help.

1. Remember what it was like last January:

- What did you hope to achieve in the coming year?
- How did you feel about that?

2. Thinking about now:

- What did you actually achieve in the last year?
- What did you achieve that you weren't planning to a year ago?
- What didn't go well?
- How do you feel about all that?

3. Create a timeline of events from the last 12 months:

- A. Create 12 columns on a large piece of paper or with post-it notes on a wall and title each column with a month: January, February, March ...
December

B. In each column write down any significant events that happened that month. You may find it useful to review archives and documents, such as:

- Email archives
- Project documents and status reports
- Blogs, diaries or journals
- Performance appraisal goals and reviews

C. You might like to write positive events in green, negative events in red and neutral events in black (or use green, red and yellow post-its). This will let you see an “emotional overview” of the year by standing back and looking at the colours.

4. Write one or two stories of your key successes. Write each one as a couple of paragraphs, and use these questions as a basis:

- What were the key events that led to the success?
- What obstacles did you overcome?
- What did you do?
- What did you believe?

5. Review and update the success stories with what supported you:

- What information did you need/use?
- What skills did you need/use?
- What resources did you need/use?
- Who supported you? (And how did they do that?)
- What external factors supported you?

6. Create one or two stories of what didn't go well. Write each one as a couple of paragraphs, and use these questions as a basis:

- What were the key events?
- What did you do?
- What did you believe?
- What stopped you being successful?

7. Review the “didn't go well stories” for what you needed:

- What information would've helped?
- What skills would've helped?

- What resources would've helped?
- What different beliefs would've helped?
- How could you have got the information, skills or resources you needed?
- How could you have related differently to the people involved?
- What could you have done differently? (And how would you know to do that?)

8. Review everything you know now and create some options for the next year:

- What are the skills, resources, activities/habits and beliefs that you want to:
 - a. keep or have more of?
 - b. acquire or develop?
 - c. stop or change?

9. Pick at most two or three things you want to acquire, develop, stop or change **and** decide on some specific actions to make that happen.

10. Tell some people your success stories!

Conclusion

At the end of this process you'll have a couple of specific improvements to make and some actions for doing it. However, the real value is the tacit learning and understanding you get from engaging in a process like this. For teams, it encourages questioning, discussion and introspection that are valuable on-going skills and activities for high performance throughout the year.

Let us know how you get on, and do feel free to contact us if you'd like to run a process like this and you'd like a coach or facilitator to help.

Get in touch

If you are interested in discussing the content of this White Paper in more detail, or would like to talk to us about your competitive challenges, please get in touch with us:

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