

The background of the central section is a dark blue image of a person's hands on a computer keyboard. Overlaid on this are various semi-transparent icons and data visualizations, including a checklist, a gear with a checkmark, a bar chart, and a city skyline. The overall aesthetic is technical and data-driven.

# Lessons learned log

**November 2024**  
**Version 1**



# Lessons learned log

## What is the lessons learned log?

The lessons learned (LL) log is a key part of project closure, helping improve future projects, demonstrate accountability, and enhance relationships with funders.

By ensuring lessons are properly documented, the log supports informed decision-making and helps assure value for money in the distribution of public funds.

Follow this simple, step-by-step guidance to complete the log easily and effectively.

## Why complete the LL log?

Documenting lessons learned is more than a checkbox for project closure. It:

- provides insights to refine processes and avoid repeated challenges.
- shows commitment to responsible project management.
- creates a resource that future projects can learn from, saving time and resources.



# Quick steps to complete the LL log

## 1. Use the template throughout the project

Fill out the log as you go, rather than waiting until the end. Jot down quick notes after major milestones, reviews, or meetings. This keeps insights fresh and saves time later.

A handy tip: add this as a regular agenda item in your team meetings—weekly or monthly—to make it part of the routine and get everyone involved!

## 2. Focus on clear and concise entries

Use bullet points or one-liners for each entry, aiming to capture the key takeaway in a few words.

## 3. Encourage team contributions

Regularly ask team members to share insights. Often, those directly involved in day-to-day activities will have valuable perspectives.

# Guidance

Fields	What to enter	Example	Tips
Unique ID	A unique identifier for each lesson entry	LL-001	Use a sequential or structured ID for easier tracking.
Category /theme	Select a category relevant to the lesson	Community engagement	Choose from categories provided in template
Lesson title	Provide a short, descriptive title	Improved stakeholder communication	Keep it concise. The title should summarise the lesson in a few words.
Source	Where the lesson came from	Team meeting	Mention specific events, feedback, or reports that inspired the lesson

# Guidance

Fields	What to enter	Example	Tips
Date	Date the lesson was recorded	MM/DD/YYYY	
Pos/Neg/ Overview	Indicate if it's positive, negative, or neutral	Positive	This helps categorise lessons by success, challenge, or observation.
Project/Programme	The specific project or program this relates to	Project ABC	Include project names if you manage multiple projects to help identify lessons.

# Guidance

Fields	What to enter	Example	Tips
Description	Briefly describe what happened	<ul style="list-style-type: none"> <li>- Increased engagement due to regular check-ins.</li> <li>- Adjusted reporting timelines for flexibility.</li> </ul>	<p>Use bullet points for clarity.</p> <p>Focus on key events or issues.</p>
Recommendations	Suggested actions or takeaways	<ul style="list-style-type: none"> <li>- Implement monthly check-ins.</li> <li>- Simplify reporting templates.</li> </ul>	Add practical steps or suggestions based on the lesson.
Share externally?	Yes/No, for sharing outside your organisation	Yes	Consider if the lesson is suitable for external sharing to foster learning.
Value Matrix Rating	Rate from 1-4 based on importance and effort	4 (High impact, low Effort)	Use the matrix guide to prioritise lessons for future action.

# Guidance

<b>Fields</b>	<b>What to enter</b>	<b>Example</b>	<b>Tips</b>
Raised by	Name or email of the person who identified the lesson	Jane Doe	
Actions identified	Specific actions to take based on the lesson	- Schedule regular check-ins. -Adjust reporting format.	List concrete steps to take, so the lesson is actionable.
Action owner	Person or team responsible for implementing actions	Project Coordinator	Assign responsibility to ensure follow-through.
Action(s) completed	Yes/No to indicate if actions have been completed		Mark as 'Yes' when actions are completed for easy tracking.
Action completed date	Date actions were completed	MM/DD/YYYY	



# The value matrix

The Value Matrix helps you evaluate the importance of each lesson based on impact (value) and the effort (or complexity) needed to implement changes.

This allows you to prioritise your lessons, focusing on high-impact changes first and deferring less critical items.

## Tips for using the Value Matrix effectively

- **Review regularly:** As the project evolves, regularly revisit the Value Matrix. Lessons that seemed less critical initially might become more important as needs change. Include this as a regular agenda item in your team meetings—whether weekly or monthly—to make it a consistent practice and keep everyone engaged!
- **Use team insights:** Encourage team members to rate each lesson for impact and effort based on their experiences; this can add valuable perspectives.
- **Act on high-impact lessons quickly:** Whenever possible, focus on implementing high-impact lessons, as they offer the most return on investment for the project's success.
- **Defer or modify low-priority lessons:** For lessons with low impact and high effort, consider if they're necessary now or could be re-evaluated later in the project cycle.



# The value matrix

	Description	Action priority
1: Low impact, high effort	These lessons require significant resources or time but yield minimal benefits to the project.	Defer or consider only if circumstances change.  Examples include adding complex tools that minimally affect efficiency.
2: Low impact, low effort	Minor improvements that don't require much effort but also have limited benefits.	Optional.  Implement these if resources allow, as they can offer small gains without straining resources.  Example: a minor form simplification to save a bit of time.
3: High impact, high effort	These lessons offer substantial benefits but will need considerable resources, time, or organisational change.	Plan and implement carefully.  Examples include hiring specialised staff or adopting a new reporting system.
4: High impact, low effort	These are quick wins that deliver major improvements with minimal resource demands.	Prioritise and act quickly.  Quick changes that yield big benefits, like adding regular check-ins to improve team communication.



# Tips for capturing high-quality lessons

## **Be specific and clear**

Focus on what happened, why it mattered, and how it ties back to the project's goals. Keep it brief but meaningful.

## **Look beyond successes**

Sometimes, neutral outcomes or unexpected results provide important insights too.

## **Prioritise key insights**

Focus on lessons that offer high impact or are particularly valuable to the team or stakeholders.



# FAQs

## **Q. Why is this required?**

A. Completing the LL Log saves future time and resources, ensures funder confidence, highlights your team's commitment to improving project outcomes, and fulfils a key contractual obligation. It demonstrates accountability and responsibility in using public funds effectively, building trust with funders and stakeholders.

## **Q. How can this help us on future projects?**

A. By recording what worked and what didn't, your team avoids repeat mistakes and refines successful approaches.

## **Q. How does sharing challenges benefit us and others?**

A. Sharing challenges allows everyone to find solutions and fosters a supportive, innovative community across projects.

The logo for Salix features the word "salix" in a white, lowercase, sans-serif font. The letter "x" is stylized with a white leaf-like shape integrated into its right side. The background is a dark purple with abstract green and black shapes on the left and bottom right.

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