REFRAMING FAILURE

Post Mortems for Library Projects

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About Us

Danielle S. Apfelbaum

Danielle S. Apfelbaum is a Senior Assistant Librarian at Farmingdale State College where she serves as the Scholarly Communication Librarian. Ms. Apfelbaum is a 2016 recipient of ALA's I Love My Librarian Award. She is currently pursuing a Ph.D. in Curriculum, Instruction, and the Science of Learning at the University at Buffalo.

Derek Stadler

Derek Stadler is an Assistant Professor at CUNY's LaGuardia Community College in Long Island City, serving as the Library's Web Services Librarian. His library research has been published in both the *Journal of Library Administration* and *Evidence Based Library and Information Practice*. Derek is also an avid history researcher, with a focus on both New York City and urban studies.

By the end of this session, attendees will be able to...

- understand the purpose and value of post mortem analyses for library projects;
- identify steps associated with planning for, conducting, and communicating the results of a post mortem analysis;
- consider how to scale post mortems for individual and team-based projects; and
- develop a post mortem analysis plan for a past or current project upon returning to their home libraries.

How many have been part of a library project that has either failed or could have been executed better?

How many set aside time to figure out what went wrong in those projects?

What is a post mortem?

A post mortem is a method for transforming tacit knowledge, insights, and experiences about a present or past project into actionable goals for future projects (Desouza, Dingsøyr, & Awazu, 2005).

Who uses post mortems?

- **Developed in software engineering industry.**
- **Underutilized even in the industry in which they were developed (Schroeder, 2013).**

Why perform a post mortem?

- Allows managers to reflect on their approach; teams, to reflect on their collaboration and coordination; and organizations, to capture and make available project insights to the whole organization (Desouza, Dingsøyr, & Awazu, 2005).
- Facilitates dialogue and perspective sharing between team members, documents successes and failures, and promotes job satisfaction through constructive feedback (Birk, Dingsøyr, & Stalhane, 2002).
- Allows you to communicate when project failures are traceable to events or elements you have no power to circumvent or mitigate.

Aren’t post mortems the same as assessment?

Assessment asks...

Did we accomplish our goal(s)? To what degree?

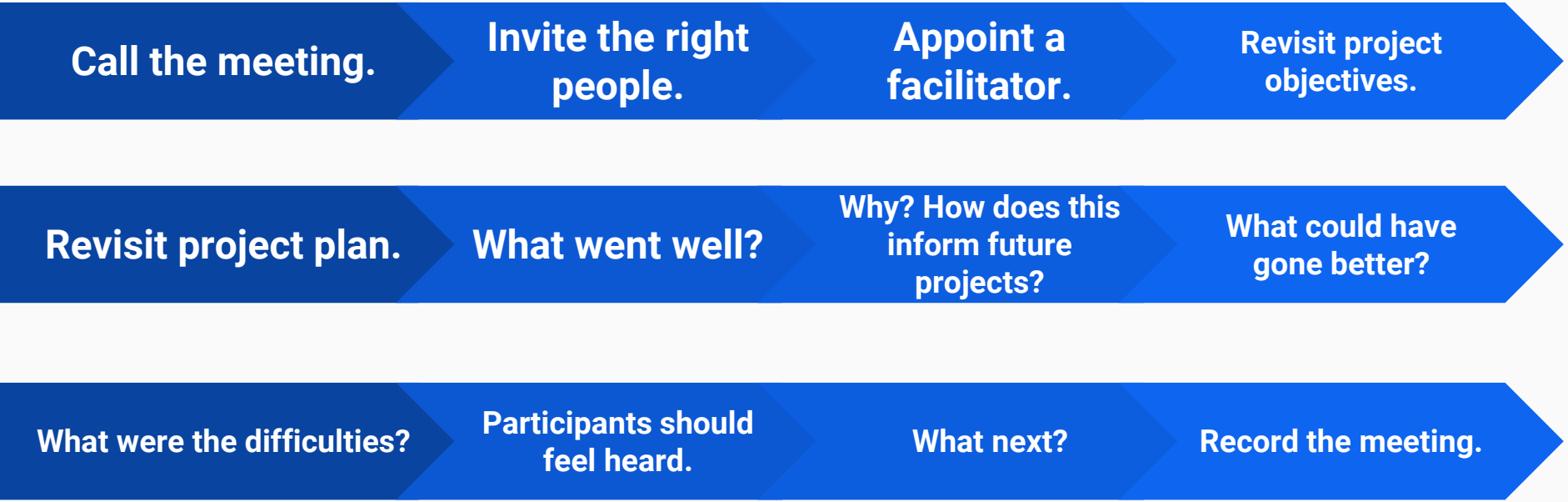
How well did we accomplish our goals? What went right? What went wrong? Why?

Post mortems ask...

How do I perform a post mortem?

- No right way to perform a post mortem analysis.
- Depends upon the time, personnel, & cost you are willing and/or able to dedicate to conducting and disseminating a post-mortem analysis.
- Several models exist.
- We will focus on three that can be done at small to medium size organizations.

Collison and Parcell's (2001) 12-Step Model*



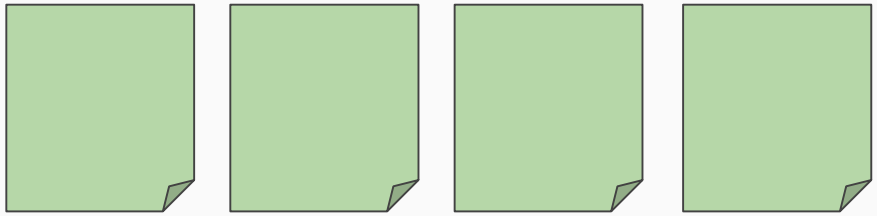
*As cited in Dingsøyr, T. (2005). Postmortem reviews: purpose and approaches in software engineering. *Information and Software Technology*, 47(5), 293-303.

Collier, DeMarco, and Fearey's (1996) 5-Step Model

Project Survey	Collect Objective Information	Debriefing Meeting	Project History Day	Publish the Results
Create and distribute a survey about the project to all project participants.	Use the success metrics (cost, quality, time, etc.) you set prior to project to capture data at the beginning, middle, and end of a project.	Provide participants with an opportunity to provide direct feedback. Select a chair, coordinator, and facilitator for the meeting.	Should be limited to those with the deepest knowledge of and involvement in the project. Establish a problem statement and review both participant feedback and objective information guided by the problem statement.	Publish as an "Open Letter to the Project Teams."

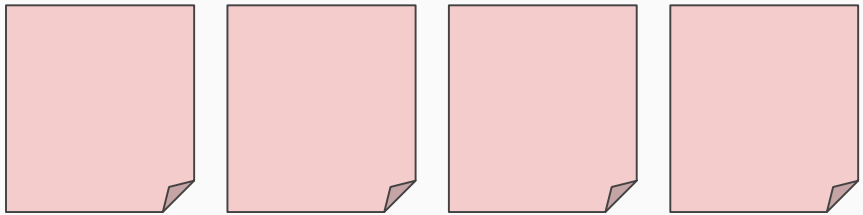
Birk, Dingsøyr, and Stalhane's (2002) 3-Phase Model

Preparation	Data Collection	Analysis
A facilitator and one or more members of the team recaps the project and determines a goal for the post-mortem.	Gather all relevant project experiences. Could obtain through semi-structured interviews, facilitated group discussions, and/or KJ sessions.	Facilitators solicit feedback as to whether the analysis team has understood participants. An Ishikawa diagram is used to identify root causes of positive and negative experiences. Results are compiled in a PMA report.



KJ Sessions

Project: Website Usability Study



Too many clicks.

Ineffective guidance.

Subject grid too big.

Printing services not indicated.

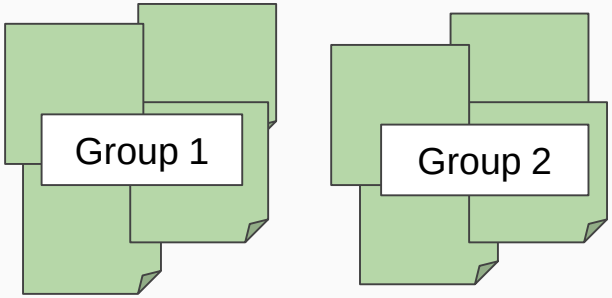
iPad & laptop loan unclear.

FAQs not visible.

Research help ineffective.

Reserves policy is unclear.

ILL ability unclear.



KJ Sessions

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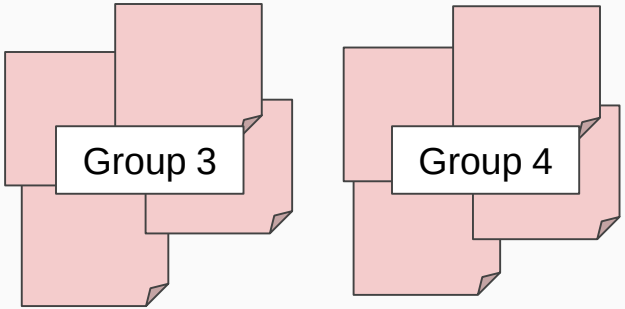
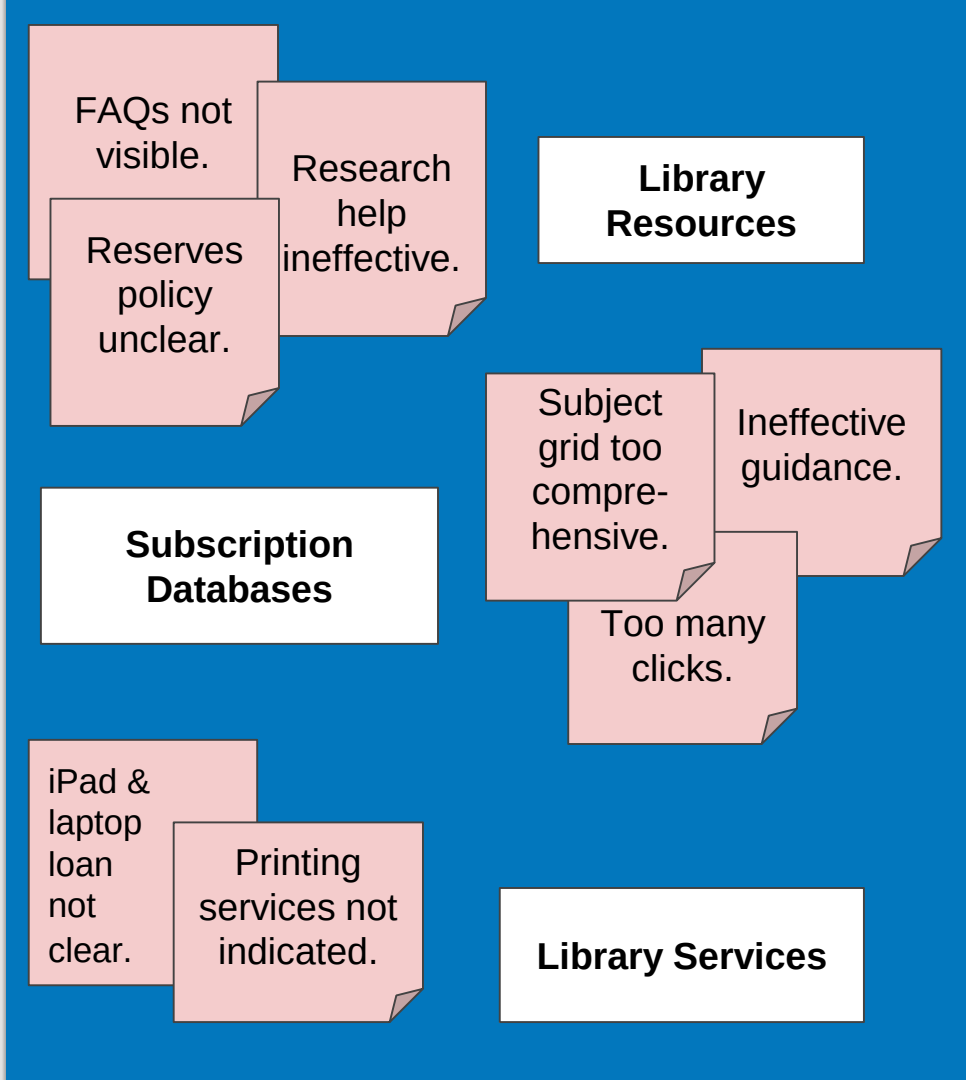
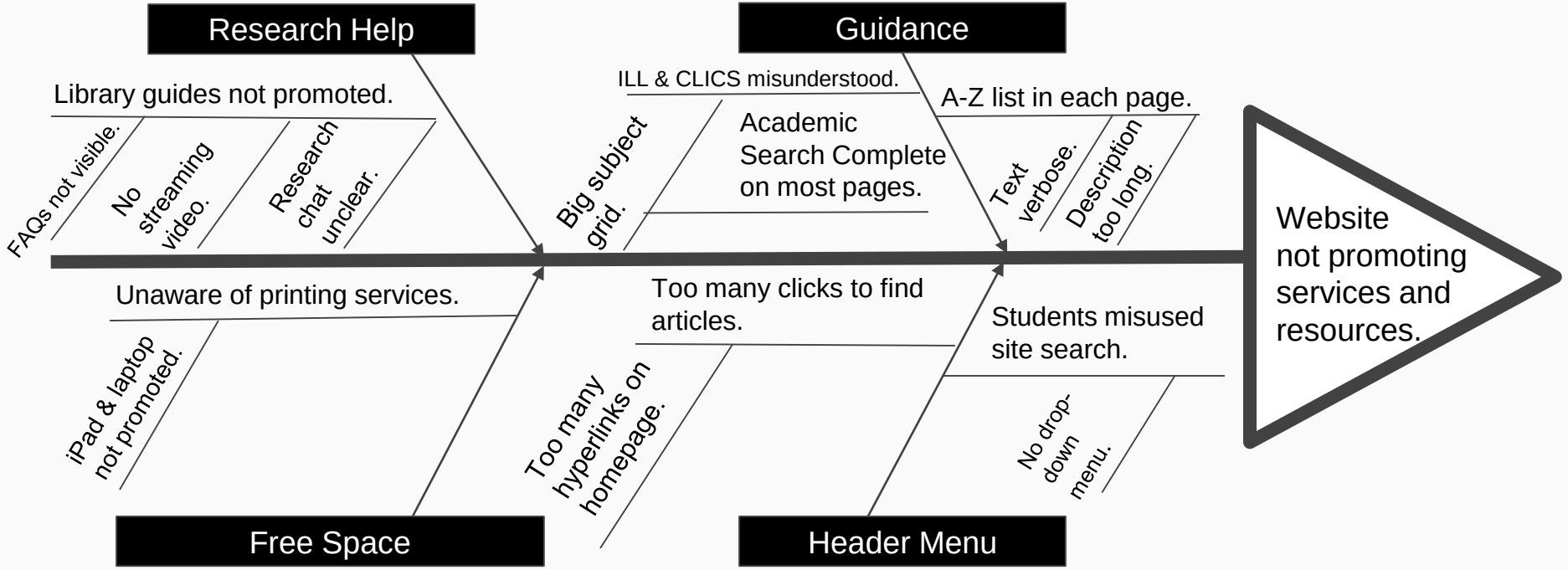




Ishikawa Diagramming



Ishikawa Diagramming

Lessons Learned

01	**New approach to database display.**	Having Academic Search Complete as the first option is not effective in each subject page.
02	**Less is more.**	Since users navigate websites quickly, the less text or description the better.
03	**Modern website header and menu is needed.**	While users need a structured header menu, designers can use images for promotion.
04	**Less clicks are needed.**	The library's most used resources and services should be a click away and not buried.

Communicating Findings

- Post mortems are only effective if they are **used**.
- Formats suggested by the literature include
  - the open letter,
  - the report, and
  - the story.

Open Letter to the Project Team

Collier, Demarco, and Fearey (1996) suggest distributing the results of a post mortem analysis in the form of an “Open Letter to the Project Team.”

The Open Letter should include the following elements:

- a description of the project,
- a description of “the good,”
- a description of “the bad,” and
- a description of “the ugly.”

The Post Mortem Analysis Report

Birk, Dingsøyr, and Stalhane (2002) suggest distributing the results of a post mortem analysis in the form of a post mortem analysis report.

The post mortem analysis report should include the following elements:

- a description of the project,
- a description of the project's problems (with Ishikawa diagrams),
- a description of the project's successes (with Ishikawa diagrams), and
- a meeting transcript.

The Post Mortem Analysis Narrative

Desouza, Dingsøyr, and Awazu (2005) suggest that for certain types of projects, distributing the post mortem analysis in the form of a narrative is most appropriate.

A post mortem narrative may be appropriate if the project is:

- novel in nature,
- of significant magnitude, and
- the resulting post mortem is intended to convey norms or core values of the organization.

Letter, Report, or Story?

According to Desouza, Dingsøyr, and Awazu (2005), one should consider the following when deciding between communicating the results in a report format or a narrative format:

- Structure
- Cost
- Context
- Comprehension
- Memorability

Storing & Disseminating Post Mortems

Collier, DeMarco, and Fearey (1996) suggest

- storing post mortems in a repository accessible to all team members,
- tagging lessons learned according to functional area/process and assigning each person an area to review and report on as it relates to the new project,
- presenting the results of the postmortem to management, and
- assigning someone in the organization a lesson learned and responsibility for implementing change relating to that lesson learned.

Practical Considerations

“Postmortem analysis is only of value if insights are engaged to guide future project management efforts” (Desouza, Dingsøyr, & Awazu, 2005, p. 204).

- What will be the goal of your post mortem?
- How will you collect data for the post mortem?
- How will you make your post mortem findings available?
- Who will be part of your post mortem at each stage?
- How will you communicate the findings of your post mortem?
- How will you ensure that existing post mortems are consulted?

Q & A

15 Minutes

Video by ANFX @ YouTube

If you'd like to get in touch with us, we can be reached at...

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References

Birk, A., Dingsoyr, T., & Stalhane, T. (2002). Postmortem: Never leave a project without it. *IEEE software, 19*(3), 43-45.

Collier, B., DeMarco, T., & Fearey, P. (1996). A defined process for project post mortem review. *IEEE software, 13*(4), 65-72.

Desouza, K. C., Dingsøyr, T., & Awazu, Y. (2005). Experiences with conducting project postmortems: Reports versus stories. *Software Process: Improvement and Practice, 10*(2), 203-215.

Dingsøyr, T. (2005). Postmortem reviews: purpose and approaches in software engineering. *Information and Software Technology, 47*(5), 293-303.

Schroeder, H. (2013). Post project assessment: An art and science approach. *Journal of Management Information and Decision Sciences, 16*(1), 37.