The Reflection and Retrospective Process
Defining Reflection in Context

“A look back at regular intervals, intended to capture learning and opportunities for continuous improvement.”
Reflection

“We do not learn from experience; we learn from reflecting upon experience.”

John Dewey
Reflection

- Learning from direct experience can be more effective if coupled with reflection - that is, the intentional attempt to synthesize, abstract, and articulate the key lessons taught by experience.
- Reflecting on what has been learned makes experience more productive.
- Reflection builds one's confidence in the ability to achieve a goal (i.e., self-efficacy), which in turn translates into higher rates of learning.

Credit - Giada Di Stefano, Francesca Gino, Gary Pisano and Bradley Staats – Harvard Business Journal
Three Reflection Processes

- What, So What, Now What
- Keep, Stop, Start
- 5 Why
The Three Step Reflection Process
Reflection – What, Now What, So What

What?  →  So What?  →  Now What?
What?

- **What** did you:
  - Hear?
  - See?
  - Feel?
  - Learn?

- **Example:**
  - *I heard that the owner on our project has an interest in finding out more about using recycled materials*
So What?

- **Why** does what you learned matter?

- **Example:**
  - *The owner is interested in learning more about the use of recycled materials on the project, and that is important because:*
  - *I’m not sure I can obtain recycled materials for our scope of work*
Now What?

- Now that we’ve learned these things and understand why they matter, **what action(s) are we going to take?**
  - **Who** is going to take that action, and **when** are they going to act?

**Example:**
- *We need to research the availability of recycled product. Tim will do the research and present it to the team during the next Big Room meeting (April 26th, 8:00am)*
Keep, Stop, Start
Keep, Stop, Start

- Best for higher-level reflection
- Focus attendees on what bugs them
- Entertain crazy ideas for “Start”
- Order is important
- Works great for larger groups
5 Why Reflection Process
5 Why

- Assume everyone acted in good faith & did the best they could
  - This is not a 5-“who” but a 5-“why”
- Be prepared to back up your opinions
- Listen with the intent to learn and do not interrupt
  - Each participant will have the opportunity to tell their story
- Say what you want to say – offer it in good faith for the purpose of learning
- This is a safe place!
5 Why

- Produce a public account of what happened
- Find the source of any disagreement
  - Examples: Differences in assumptions, standards, in background
- Produce a list of possible countermeasures & actions for improvement
- Identify Champions for each countermeasure
- Produce an action plan for process development & deployment
  - Guiding Question: Who will do what by when?
5 Why

- Sift through the facts in each account & identify inter-related statements
- Develop succinct problem statement(s)
- Ensure all participants agree on the problem(s) we are trying to solve
- Review multiple problem statements separately & confirm they are independent of each other
- Remember: A problem well-defined is half solved!
5 Why

- Clarify parts of the process that are not apparent in the narrative:
  - Was proper documentation completed?
  - Was process clear? Did we complete a BiQ for this process?
  - Was process followed?
  - Could we have detected the problem before the failure or incident?
  - Were there defects in the plan?

- If there is more than one credible answer to a “why” question posed:
  - Branch the conversation & document each reason provided
5 Why

- Identify what contributed to the result
- Capture & make all countermeasures & action items visible
- Multiple streams are likely due to our complex projects & delivery methods
- When all chains are run out, revisit what has been captured
  - Have we learned anything that suggests that we should reconsider causes or countermeasures?
  - Are there other possible countermeasures that we should consider?
  - Are there root causes that we should prioritize to address?
5 Why

- Gather reliable promises from Champions
  - Guiding question: Who will do what by when?
- Determine whether all countermeasures should be launched simultaneously
- If necessary, consider temporary countermeasures while permanent countermeasures are being developed
- Challenge the team to determine how they will track reliability
5 Why

- Recognition & Plus / Delta
- After the Session:
  - Gain commitment from Scribe to distribute meeting minutes
    - Goal: less than 24-hrs of 5Why Session
    - Send to Facilitator(s) & main Person of Contact for review
  - Follow-up with main Person of Contact to complete A3 after meeting minutes distributed
Reflection – the 5 Why Process

- Define a problem statement

- Example:

- Worker fell from scaffold
  - Why did worker fall from scaffold?
    - He wasn’t wearing his harness.
      - Why wasn’t worker wearing a harness?
        - Harness was missing.
          - Why was harness missing?
            - Because we don’t lock them up every night
              - AND (branch!) because we don’t have enough harnesses on the project, and someone borrowed his
                - Why don’t we have enough harnesses on the project?
Reflection – Three Step Reflection Process

What? → So What? → Now What?
Questions / Key Takeaways