



# **AFTER ACTION REVIEW**

**Inter-American  
Development Bank**

**KNOWLEDGE AND  
LEARNING SECTOR  
(KNL)**

**TECHNICAL NOTES**

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# AFTER ACTION REVIEW



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## After Action Review: Learning After Doing

### Introduction

A disciplined approach to “Learn from Experience” is critical to the enduring ability of the Inter-American Development Bank (IDB) and its regional partners to make effective knowledge-based decisions and optimize development outcomes. In order to achieve the desired results, learning before, during, and after everything we do must be ‘part of the way we work’ at the IDB -not something extra.

The IDB has developed several methodological tools that will help Bank personnel and their regional stakeholders identify, capture, and as applicable, share their knowledge for re-use by others. As shown in Figure 1, these methods to mainstream learning from our individual and collective experience in every phase of our project cycle (and other key operational processes) include the Peer Assist,<sup>1</sup> In Action Review,<sup>2</sup> Knowledge Capture Interview,<sup>3</sup> and After Action Review.

Knowledge captured using these methods can be analyzed and organized using the ‘Knowledge to Action’ methodology,<sup>4</sup> which produces and organizes actionable ‘Key Learnings’ for re-use by their target audience(s). Key learnings captured from individual projects can help teams solve current operational challenges and improve performance indicators. The cumulative capture of key learnings from multiple projects in a specific country, (sub-)sector, or business process allow for the compilation and validation of a critical mass of relevant knowledge, which can be disseminated effectively through an integrated online knowledge base and/or be leveraged to develop or update training or other capacity building efforts.

This way, the IDB can ensure practitioners are able to take advantage of what has been done and learned before in IDB operations, and make effective decisions based on the latest available knowledge.

### What is an After Action Review?

The After Action Review (AAR) is one of the methods used within the Bank’s cycle to learn from experience. Specifically, it is a ‘learning after doing’ technique that helps teams identify and share what worked and what hasn’t worked at the achievement of a specific goal, the completion of a significant phase, the resolution of an issue or the close of the project.

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<sup>1</sup>For more information see Peer Assist, Inter-American Development Bank, 2012.

<sup>2</sup> For more information see In Action Review, Inter-American Development Bank, 2012.

<sup>3</sup> For more information see Knowledge Capture Interview Inter-American Development Bank, 2012.

<sup>4</sup> For more information see Knowledge to Action (K2A), Inter-American Development Bank, 2012.

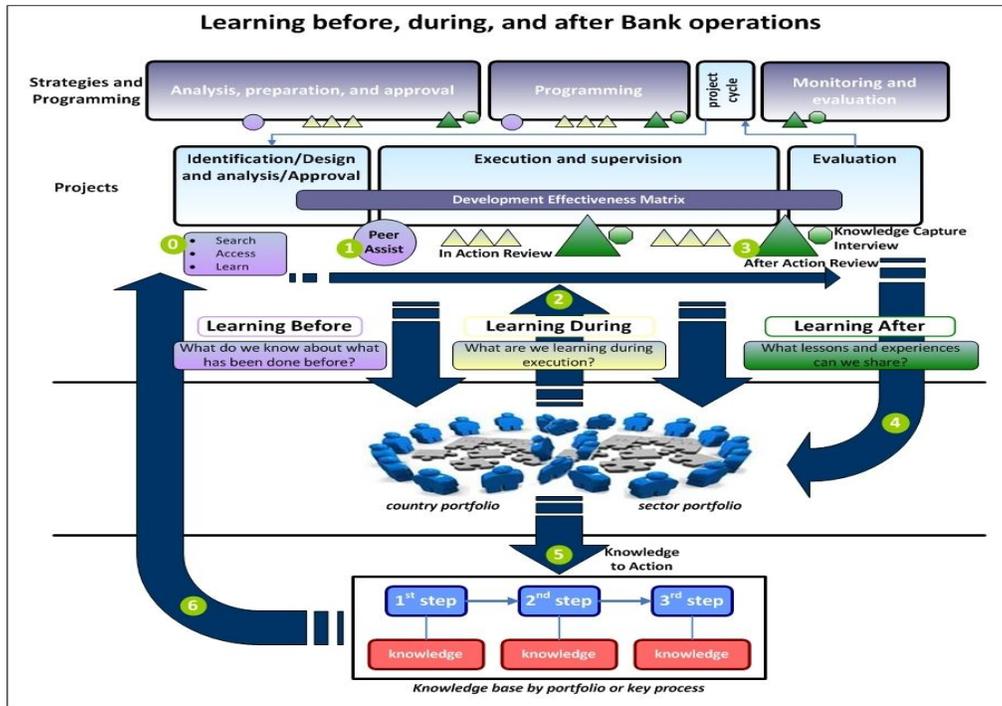


Figure 1: Learning from project experience - before, during and after-

The AAR is used to identify and capture effective practices and learnings derived from the collective experience of members of a team. An AAR is conducted via dynamic, structured discussion among team members, including partners and clients where appropriate. During this discussion, experiences and activities are analyzed based on expectations and outcomes achieved: **What happened and why? What worked well? What could have gone differently? What are the key learnings and recommendations?**

#### What is the value added of an After Action Review?

The AAR is an effective way to capture valuable knowledge from participants in a project, event, or organizational process; so that it can be shared with others who may need it to support their decision-making for better performance and results. Benefits include the identification of key learnings (within the team and for others), enhanced team openness and cooperation, and achievement of results.

There are other 'learning after doing' techniques such as the Knowledge Capture Interview, which is similar to the AAR. However, the main characteristics that identify the After Action Review are the following:

- Is conducted typically with the whole team together (ideally 10-12 people, up to max. 20 people) at the same time.
- Takes about 3-4 hours, and requires some advance planning and scheduling lead time.
- Builds on differing perspectives in a group setting to develop consensus on key issues or topics.

- Is ideally suited for end of phase learning within the project and end of phase/project learning for dissemination to other audiences.
- Supports team and relationship building through the facilitation of a common understanding of challenges faced in the past (closure).

Like the Knowledge Capture Interview, the After Action Review identifies critical key learnings of what worked and what did not work in a particular project (phase), process, or issue. Identified Key Learnings can be leveraged to create knowledge products (e.g. case study, lessons learned note) or seed an online Knowledge to Action (K2A) base.

Either approach can engage IDB project team members, government counterparts, private sector partners, project beneficiaries, and other key stakeholders of the project, either separately, together, or both. Knowledge Capture Interviews and After Action Reviews can also be used together to complement the value added each brings.

### How can I set up an After Action Review and what support is available?

As mentioned before, AARs should be scheduled to take place when memory is fresh and unvarnished, and when key actors are still available to participate. To prepare an AAR, identify a facilitator that is not a member of the team and discuss the purpose, scope, and any other relevant background information with the facilitator, so that an annotated agenda that matches your circumstances and needs can be prepared. AARs typically take anywhere from 3-4 hours for small teams (up to 6 people) to one day for large groups (up to 16-20 people), or up to 2 days with an extended scope that could include detailed process mapping and/or a knowledge transfer session with another team (internal or external).

The KNL team is available to provide methodological and facilitation support to teams to plan and conduct After Action Reviews and to determine the best way to document and disseminate their outcomes. Financial support may also be available.

For more information, please contact KNL/KNM at [aprenderdelaexperiencia@iadb.org](mailto:aprenderdelaexperiencia@iadb.org)

### What are some keys to conducting successful After Action Reviews?

#### Preparation:

To take full advantage of an AAR and the time its participants invest, it is recommended that the team, and particularly the leader or organizers do the following:

- **Define in clear terms what is to be learned during the AAR and for what purpose:** the team needs to begin with an agreement about the purpose of reviewing a specific project or activity, which stage or stages will be the subject of review (the timeframe), and the audience to whom the conclusions and recommendations will be directed.
- **Conduct the AAR as soon as possible after the project milestone or phase to be reviewed:** participants' memories are still fresh, it is more likely that they are available and that the lessons identified will be more relevant and applicable.

- **Include relevant individuals:** in addition to the project or activity team, it may be useful to invite project clients or partners. It should be kept in mind, however, that outsiders may hinder some members' participation.
- **Select a facilitator:** ideally, the facilitator will be someone outside of the project or activity. His or her goal is to focus the discussion by asking questions that promote reflection and create an atmosphere appropriate for dialogue.
- **Select a rapporteur:** AARs enable the identification of lessons and recommendations, but need to be documented to allow for dissemination. Documentation also makes it possible to strengthen institutional memory and create a record that can subsequently be analyzed to identify best practices. The role of the rapporteur is, therefore, essential to an AAR's success and usefulness.

### **In the AAR session:**

#### **1. Introduction**

The facilitator (and participants) should encourage a frank and open atmosphere from the start, emphasizing that the AAR is a learning event and not an evaluation. As part of the introduction it is also important for the facilitator to:

- **Remind participants of the ground rules:** emphasize that ideas compete on a level playing field and that their value does not depend on the age, experience or rank of the persons that propose them
- **Clarify the AAR's objectives:** through a brief summary of the project or activity, mention the purpose (i.e. the question to be explored), the timeframe covered, how and with whom conclusions will be shared, and their expected use
- **Present the meeting agenda and methodology**

#### **2. Revisit the Goal: What were our objectives and deliverables?**

Facilitate a brainstorming exercise to list objectives, deliverables and measures of success, if applicable:

- Purpose and objectives of the project or activity (What did we set out to do or deliver?)
- Project or activity timeframe (e.g. the dates and duration of preparation and/or execution)
- Project or activity beneficiaries and other critical actors, and their respective roles
- Expected deliverables

#### **3. Revisit the Process: What actually happened?**

Discuss what the process looked like. Some facilitators, when time permits, like to construct with the team a timeline of what happened, identifying tasks, deliverables, and/or decision points. One of the techniques the facilitator can use consists of dividing the project or activity into "*critical moments*". A critical moment is an important step or milestone -whether positive, negative, or neutral- during the implementation of the project or activity under review. This way, you can create a timeline and identify moments, circumstances or decisions that marked a true difference in the path of the project or activity.

#### **4. In the context of the objectives, what went well?**

The team identifies successes and achievements worth highlighting and that can be replicated. It is important for the facilitator to help the team look into the reasons behind its success and specify the contributing factors and circumstances that could be used and adapted by other teams in similar situations. Go around the table and ask each individual to write down what he or she considers the success factors to be and start by asking each to share one (and then keep going around as time permits).

#### **5. In the context of the objectives, what could have gone better?**

There are bound to be some areas where things could have gone better, where pitfalls were identified too late, and where process was suboptimal. The team identifies problems and obstacles that affected performance and what can be learned from them. The team's attention should focus on going beyond description of problems and obstacles, towards clarifying how these can be corrected, or prevented, in the future. Ask each individual to write down his/her thoughts and then go around the table asking them to each share one (and then keep going around as time permits).

The facilitator should ensure that this section of the process does not become a finger-pointing exercise. If necessary, remind the participants of the meeting's purpose, to make sure similar projects go smoothly in the future: Inquiry, not inquisition.

#### **6. How would you rate your level of satisfaction (1-10 exercise)?**

You do not want anyone to leave the meeting feeling that key issues were missed or brushed over or that valuable effort was not acknowledged. To help you access residual feelings of dissatisfaction, begin by asking people for a numerical rating of the project.

- Ask everyone to give a rating from 1-10 for their level of satisfaction with the dimension of the process or project under analysis that was the subject and scope of the After Action Review.
- Ask, "What would have made it a 10 for you?" and question the reasons for that rating.

#### **7. Actions for follow up**

Ensure all action items that have emerged over the course of the AAR have been properly documented, that a responsible party and a deadline have been established, and ask if there are any additional action items to be added to the list at this point.

#### **8. Key Learning Documentation and Dissemination**

Meeting results are intended for the team itself and for other teams on similar future projects, so document and present the lessons as targeted, actionable advice, backed up by relevant context (stories) shared in the After Action Review. Make sure you circulate the Key Learnings report, together with any other output from the meeting for participant review of accuracy and completeness.

A Key Learning<sup>5</sup> provides in a single sentence a clear recommended action for the knowledge re-user to consider in response to a specific practical question or challenge, and is presented in context to help the

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<sup>5</sup> For a more detailed example of a practical application see Knowledge to Action K2A, Inter-american Development Bank, 2012.

user quickly and effectively assess its relevance to the specific situation he or she is currently facing. For example:

**“Involve teachers in the design process** of any merit pay system being considered and ensure they have the opportunity to provide feedback to assuage fairness and transparency concerns, **because teacher support is critical** to the system's prospects for sustainability.”

Key Learnings do not simply recommend you what to do, they help you think differently about what you are about to do by explaining *why, how, or in what circumstances the knowledge is relevant and applicable*. Each Key Learning is linked to the knowledge source from which it was derived. Key Learnings are organized by topic and sub-topic (or process) to make them easier to find and re-use as part of the target audience’s decision making process.

While the Key Learnings report gives the participating team a single deliverable with all the key knowledge and action items for follow up, the knowledge captured in an AAR can also be disseminated further through the Knowledge to Action (K2A)<sup>6</sup> process so that people looking to learn from what has been done before will be able to find and understand them, and that they know how to contact the people involved in generating them. In addition, identified learnings can be used as source knowledge for the development of knowledge products like Case Studies and Technical Notes.

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<sup>6</sup> For more information see Knowledge to Action (K2A), Inter-American Development Bank, 2012.





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