

The Effective Review Checklist



At the end of the task or project, it's time for a final Review.

There are a variety of names for this step:

- **After Action Review (AAR)** - U.S. Army origin; now widely used broadly
- **Debrief** - common in aviation, medicine, sports, and military
- **Hot Wash** - military/emergency management; done immediately after an operation
- **Retrospective (Retro)** - Agile/Scrum methodology
- **Lessons Learned** - formal project management and federal contracting

All of them contain a few essential themes:

- *What worked well (or even better than expected) - and why?*
- *What didn't work as well as expected - and why?*
- *What "pop ups" got in the way that we didn't anticipate?*
- *What would we do differently if we were starting fresh?*

Regardless of which framework you use, to be effective a Review must be:

- ☐ **Completely honest and open.** Don't hide near-misses, mistakes, or uncomfortable truths. The whole point of a Review is to see clearly - and you can't do that with the lights half off. If something went wrong, name it.
- ☐ **Thorough.** Examine all aspects of the work, not just the obvious wins or the most visible problems. The details matter. A surface-level Review produces surface-level learning.
- ☐ **Timely.** The longer you wait, the more details fade, get rationalized, or get quietly rewritten in memory. Do it while the experience is still fresh.
- ☐ **Psychologically safe.** People only speak honestly if they believe honesty won't be used against them. A Review where people are afraid to surface near-misses or admit mistakes isn't a Review, it's a performance. Creating that safety is the leader's job.
- ☐ **Specific, not general.** "Communication was an issue" is a generality. "We didn't agree on who owned the client follow-up after the kickoff meeting" is specific. Specific observations lead to specific changes. Vague ones lead to nodding and nothing.
- ☐ **Inclusive of all voices.** The people closest to the work often have the most important insights — and are least likely to volunteer them unprompted. Ask directly. The leader's view of what happened is rarely the complete picture.
- ☐ **Documented.** A Review with no record is just a conversation. Write down what you learned and what you're changing. If it isn't captured, it disappears — and you'll have the same conversation again next time.