

MILESTONE

*Providing Stepping Stones
Along the Path to Success*



A WOMAN-OWNED
SMALL BUSINESS

LESSONS LEARNED:
MAKING IT STICK

Organizations don't struggle to collect lessons learned. They struggle to use them. Teams often walk away from projects with pages of insights, only to repeat the same mistakes the next time around. The real challenge isn't documenting lessons — it's making them stick and ensuring they influence future decisions in meaningful ways.

Capture Lessons While the Work Is Happening

Lessons learned are most powerful when they're gathered throughout the project, not saved for a rushed end of project meeting. When teams pause regularly to reflect on what's working and what isn't, they catch issues early and preserve insights that would otherwise fade. These short, frequent touchpoints also normalize learning as part of the workflow rather than a post mortem chore. Over time, this rhythm builds a habit of reflection that strengthens team performance.

Create a Culture Where People Can Speak Honestly

If team members don't feel safe sharing missteps, you'll never get the insights that matter. Psychological safety is the backbone of meaningful lessons learned. People need to know they can speak candidly without blame or repercussions. When the environment supports open conversation, lessons become richer, more accurate, and far more useful. This openness also encourages teams to share successes, not just failures, which helps reinforce repeatable best practices.

Turn Insights Into Clear, Actionable Guidance

A lesson like "improve communication" doesn't help anyone. Effective lessons identify what happened, why it happened, and what should be done differently next time. The more specific the recommendation, the easier it is for future teams to apply it. Actionable lessons might include steps, templates, or examples — anything that helps translate insight into behavior and supports consistent execution.

Make Lessons Easy to Find and Hard to Ignore

Even the best lessons won't be applied if they're buried in forgotten folders. Organizations need accessible, searchable repositories that integrate with real project work. Lessons should surface at the moment they're needed: during planning, risk reviews, kickoff meetings, or sprint retrospectives. When insights are woven into existing processes, they naturally influence decisions and shape stronger outcomes.

Close the Loop by Checking for Application

One of the most overlooked steps is verifying that lessons are actually being used. Build checkpoints into project initiation or governance reviews that ask teams to reference relevant lessons and show how they're applying them. This simple expectation reinforces that lessons aren't optional — they're part of how the organization works.

When Lessons Stick, Organizations Get Better

When organizations treat lessons learned as living guidance rather than archived documents, they turn everyday experience into long term capability. The real value comes from consistently applying insights, reinforcing them through culture and process, and making them visible at the moments that matter. When lessons truly stick, teams don't just complete projects — they get better with every one.

UPCOMING FREE WEBINAR

**MAKING IT STICK:
ENSURING LESSONS
LEARNED BECOME
LESSONS APPLIED**

TUESDAY, JUNE 16

10:00 - 11:00 AM CST

1 PDU

**TO REGISTER, GO TO
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The logo for The Mathis Group, consisting of the letters 'M', 'G', and 'G' in a large, white, serif font. The letters are arranged with the first 'M' and 'G' on top and a second 'G' below them, all set against a blue background.

**SATISFIED CLIENT
OF THIS COURSE**

FAA

KNOWLEDGE TRANSFER IN PROJECT MANAGEMENT: SECRETS TO INCREASE TRANSFERRING KNOWLEDGE FROM THE TEAM TO THE CUSTOMER - 1 DAY

PDU's - 6.5

PMI's Talent Triangle Breakdown

Ways of Working - 3.75

Power Skills - 0.50

Business Acumen - 2.25



virtual
instructor-led

Course Description: Transferring Knowledge in project management involves transferring knowledge from the project team to the Customer. It is one of the best ways to educate current employees about new processes, procedures, and knowledge from a project or new initiatives. Knowledge transfer is more than on-the-job training; it means replicating the actions of an experienced worker.

Knowledge transfer in projects rarely happens organically; it must include a transfer-of-knowledge plan with milestones for learning and understanding the new knowledge. Knowledge transfer can occur throughout the project or at the end, before closing out, and includes both tacit and explicit knowledge.

Course Objectives:

Objective 1: Understand an overview of knowledge transfer

- Define knowledge transfer
- Barriers to knowledge retention
- Benefits of knowledge transfer

Objective 2: Defining explicit, tacit, and lost knowledge

- Determine the impact of lost organizational knowledge
- Understand the types of lost organizational knowledge
- Classify types of lost organizational knowledge

Objective 3: Analyze the characteristics of a good knowledge transfer program

- Appraise types of knowledge
- Create a continuous improvement process for knowledge transfer
- Determine the cost-benefit of transferring knowledge

Objective 4: Evaluate the type of learner

- Identify strategies for a resistant learner
- Understand the difference and fallout of push/pull learning
- Evaluate shallow learning

Objective 5: Determine which SMEs possess knowledge in specific areas

- Create a Skills Transfer List by SME
- Create a knowledge transfer strategy
- Work with current experts and SMEs

Objective 6: Evaluate techniques for transferring knowledge

- Evaluate the current knowledge retention strategies
- Differentiate knowledge transfer, which requires training
- Distinguish knowledge transfer through mentoring

Objective 7: Select the criteria for documents and archiving

- Audit new knowledge usage
- Meet the documentation goals and objectives for the project



A WOMAN-OWNED SMALL BUSINESS (WOSB)



Providing quality, customized training and consulting services that inspire, educate, and equip organizations to be better tomorrow than they are today.

DR. KEITH MATHIS, PMP, PMI-ACP, CSP-SM, CSP-PO
WANDA MATHIS, M.ED. PMI-ACP

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- PROJECT MANAGEMENT
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2026 WEBINARS

MAY 22 - AI AS YOUR PROJECT LEADERSHIP ASSISTANT:
Quick Drafts, Rapid Brainstorming, and Efficient Content Creation

JUNE 16 - MAKING IT STICK:

Ensuring Lessons Learned Become Lessons Applied

JULY 17 - INVENTING TOMORROW'S METRICS:

Shaping the Future of Project Management

AUGUST 7 - BUILDING RESILIENT PROJECTS:

Thriving in Times of Disruption

SEPTEMBER 11 - CYBERSECURITY IN PROJECTS:

Protecting Your Data, Teams, and Reputation

OCTOBER 16 - BEYOND MILLENNIALS:

Leading Multi-Generational Project Teams for Impact

NOVEMBER 13 - LEADING HYBRID TEAMS:

Aligning, Adapting, and Delivering Results

DECEMBER 4 - LEADING STRATEGIC RISK:

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We know that it can be hard to schedule continuing education for your team. We offer free monthly webinars that can be watched as an individual or a group. This 1-hour of training can be used to hone skills that your team needs. We include a Webinar + Notes with discussion questions to guide your group to learn from each other. If you can't make it to the live session, a replay link will be sent out.

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