

AFTER-ACTION REVIEW

Convert a difficult decision, missed handoff, or operational disruption into learning.

Completed by: Sales, Operations, and affected leaders	Recommended timing: Within several days of a meaningful event
Date: _____	Situation: _____



PURPOSE

Use this review after a customer commitment, capacity conflict, missed delivery, successful exception, or cross-functional breakdown. Keep it factual and blameless, but not accountability-free.

Question or field	Your response
Event or decision reviewed	
What did we expect to happen?	
What actually happened?	
What facts and measures describe the result?	
What explains the difference?	
What did Sales do well?	
What should Sales do differently?	
What did Operations do well?	
What should Operations do differently?	
What did the decision process help or hinder?	
What should we repeat?	
What should we stop?	
What should we change?	

Apply the learning

Question or field	Your response
Change to the operating agreement	
Change to the decision checklist	
Change to customer communication	
Change to pipeline or capacity information	
Training or coaching needed	
Owner	
Completion date	

Turn the result into action

Question or field	Your response
Where the lesson will be documented	
Who must be informed	
How we will know the change worked	
Review date	

COMPLETION STANDARD Do not stop with insight. Leave with a clear behavior, an accountable owner, a date, and evidence that will show whether progress occurred.

