

#	Date	Lesson Learned	Inciting Event	Next Actions
1	19/12/2022	To fully capture all of the requirements in the Scope of Work and ensure that the scale of work is fully appreciated and costed. CrowdFlex:Alpha was too ambitious in its delivery, given its timescales.	Some work activities such as engagement across and within ESO and with the wider industry and related projects was not fully scoped and appreciated. This required a significant amount of extra effort that was not originally planned for.	Ensure that for the Beta phase and all subsequent application, the requirements are fully captured and costed in the Scope of Work.
2	23/01/2023	That a more detailed plan for engagement with SMEs within ESO is needed for all SIF / Virtual Energy Systems projects. Effort estimation and costing for this work should be completed prior to application to ensure SMEs dedicate effort to the project and ESO Impact Assessments are undertaken.	During the alpha phase, time was booked in the diaries of SMEs on an ad-hoc basis (one hour meetings), which was not enough and caused multiple scheduling issues.	Incorporate time/effort/costs for Change Processes into the Beta Application and all future projects. SMEs must begin Impact Assessment (on IT, Forecasting, Control Room, etc.) before the project goes live.
3	23/01/2023	SIF is designed such that bringing in new partners for the benefit of the project is intended. This was not properly conveyed and understood by all partners.	Inclusion of new partners as an ongoing requirement across a SIF project needs to be understood by all partners.	Bringing in additional partners should have a clear process. Give clear guidance to all partners on this issue at the beginning of future SIF projects.
4	27/02/2023	Roles and Responsibilities must be clearly defined within ESO. Partner recruitment should be clearly articulated and the risks associated with this managed.	After a key ESO project member left, Roles and Responsibilities were not clearly defined. This resulted in the ESO Project Manager needing to manage the full technical delivery of the CrowdFlex Project and acquiring more responsibility than is appropriate for their grade and role. The lack of resources to undertake certain roles in partners was not properly conveyed and delays that resulted due to recruitment issues could not be managed appropriately.	For CrowdFlex:Beta delivery and other Use Case projects, roles and responsibilities for all ESO staff must be clearly defined and be appropriate for the staff level they are assigned to. Partners must make it clear where they are recruiting and have a clear plan in place for this before the project is awarded.
5	30/01/2023	There was an over-ambitious schedule of delivery for CrowdFlex:Alpha. 13 formal deliverables were included in the plan - more than 2 per month. In combination with the over-ambitious scope (point 1), this made CrowdFlex:Alpha very hard to deliver. Formal deliverables should only reflect the key outputs and milestones and other mechanisms should be used to show project progress.	The CrowdFlex project remained behind schedule on all of its deliverables across its entire life until the end when a huge effort was required to produce the final deliverables before project close.	Ensure that for CrowdFlex:Beta and for all future SIF projects, the number of deliverables is aligned with the most essential outputs: not every work package requires multiple deliverables.
6	30/01/2023	Management reporting requirements need to be fully understood and accounted for in scoping and cost the work.	The project management resource was underestimated as a more light-tough approach akin to that used in NIA projects was envisaged. In reality a more formal reporting process was required that took significantly more effort.	Fully account for required management reporting approach when costing and scoping SIF applications.
7	30/01/2023	Financial reporting required more detail.	Accurate and regular reporting of spend was not factored in for the level of management required for the project. This left the PM without the tools required to properly track and report spend in the project.	Ensure contracting and management reporting requirements are commensurate with the needs of the project and that this is fully understood by all partners.