The status of lessons learning in organisations

Results of a survey in summer 2009

Methodology
In summer 2009, Knoco Ltd conducted a survey of the state of lesson-learning in organisations, using an on-line questionnaire. The purpose of the survey was to gain some background data for the forthcoming book "The Lessons Learned Handbook: a Practical Knowledge-Based Approach to Learning from Experience" which is due to be completed at end 2009. The questions are attached as Appendix 1.

74 responses were received. The organisations represented fell into the following categories, with 11 respondents not identifying their organisation.

- Academic (1)
- Automotive (1)
- aviation (2)
- consulting and services (9)
- engineering and construction (7)
- insurance and banking (2)
- IT (4)
- Legal (2)
- manufacturing and sales (5)
- military (4)
- mining (1)
- oil and gas (10)
- pharmaceutical (4)
- public sector (7)
Prevalence of lessons learned systems

76% of respondents said that their organisation has a lessons learned system in place in at least one major part of their activity. A further 7% were in the process of introducing one. 6% had previously has a lessons learned system, but had stopped, while 11% had no system.

The graph below (Figure 2) shows the responses to this question by industry group. Lessons learned systems seem to be most common in oil and gas, military and engineering and construction (and possibly also in mining and retail, though numbers are too small to be sure).
The respondents were asked which part of their business applied lessons learned. Answers are listed below. At least half of the respondents apply lessons learned within the project context.

3. If "Yes", then which part(s) of activity?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project management</td>
<td>24</td>
</tr>
<tr>
<td>All activity</td>
<td>7</td>
</tr>
<tr>
<td>Software deployment and release</td>
<td>4</td>
</tr>
<tr>
<td>Bidding and pitching</td>
<td>3</td>
</tr>
<tr>
<td>Industrial safety occurrences</td>
<td>3</td>
</tr>
<tr>
<td>Research and development</td>
<td>2</td>
</tr>
<tr>
<td>Operations</td>
<td>2</td>
</tr>
<tr>
<td>Service improvement and related IT projects</td>
<td></td>
</tr>
<tr>
<td>We have been running a major change project</td>
<td></td>
</tr>
<tr>
<td>activities at points throughout that project</td>
<td></td>
</tr>
<tr>
<td>pre-, during-, and post- consulting assignment</td>
<td></td>
</tr>
<tr>
<td>monthly e-mails</td>
<td></td>
</tr>
<tr>
<td>Engineering design</td>
<td></td>
</tr>
<tr>
<td>Different units, different functions</td>
<td></td>
</tr>
<tr>
<td>Implemented as part of Lean/SixSigma programme</td>
<td></td>
</tr>
<tr>
<td>Compile as a part of most engagements</td>
<td></td>
</tr>
<tr>
<td>Supply Chain</td>
<td></td>
</tr>
<tr>
<td>We analyze and retrain at every step</td>
<td></td>
</tr>
<tr>
<td>I call it debriefing for improvement</td>
<td></td>
</tr>
</tbody>
</table>
Effectiveness of lessons learned systems

The survey asked those respondents who had, or were introducing, a lessons learned system, to rate the effectiveness of the system, using a rating between 0 (not at all effective) and 5 (Excellent). The responses are shown below.

![Figure 3](image)

- 6% rated the system as 0 (not at all effective)
- 6% rated the system as 1 (slightly effective)
- 48% rated the system as 2 (moderately effective)
- 15% rated the system as 3 (good)
- 18% rated the system as 4 (very good)
- 6% rated the system as 5 (excellent)

Figure 4 below shows the average effectiveness rating for each industry group, set within the range of ratings between high and low scores. The highest average ratings are from retail (one single score), consulting and services, manufacturing (with a very wide range), military and oil and gas. The highest single ratings (ratings of Excellent) are found in manufacturing and military.
Success factors
Participants who scored highly (3, 4 or 5), were asked to identify success factors which resulted in a high score. Responses are shown below, and are relatively varied.

5. If you scored high (3 or more out of 5), what are the essential elements of the process that ensure it works well?

- consistency of application (2 responses)
- Honesty
- Ensuring the participants in the review process cover a wide range of perspectives on the activity being reviewed; small group discussions and large group consolidation; examining what we did well and what we would do differently in equal measure; creating an action plan for tackling the next phase in a way that keeps the positives and improves the negatives; ensuring those implementing the next phase are very involved in the review process so they are bought into changes; communicating the new strategy to those who need to know, with reasoning where appropriate.
- Getting buy in and regular update
- Process governance on three axes: Process, Systems and People aspects of KM
- basic understanding by the people involved
• Compile call centre performance data and use to correlate with interventions to assess impact.
• gets emailed everywhere - discussed in OHS meetings
• One on one interviews, involving the right people, becoming the way we do business
• decrease of the incident-accident of the similar cases in the statistics
• Tight specification of what we wish the evaluation effort to achieve and good objectives at the outset
• Involve ALL stakeholders + document outcomes and communicate them to other areas of the company
• Mandatory to do at end or every project and must be reviewed at project proposal/kickoff. Driven by QA
• good communication
• Team evaluation and consultation
• The material is essential to ensure we are not repeating our mistakes. In addition we regularly review production processes in terms of poka yokes - these concepts are then introduced on other lines where benefits are apparent.
• that it is completed over time and not at the end
• Debrief, evaluate, analyze and implement what can be done better
• Involvement from all from the start, group development of the benefits of the initiative, group agreement to/development of the process
• hi level (management) involvement
• This is a difficult question for us to answer. There are too many different teams potentially applying these methods, we are not sure how systematically applied they are and we have no metrics on the impact of these in terms of performance improvement. However, I think we can say that as part of the innovation process testing & learning is essential to product development, and sharing learning is important to support the spread and adoption of these.

Barriers
Participants who scored low (0, 1 or 2), were asked to identify the barriers which resulted in a low score. Reponses are shown below, and several common factors can be identified.

6. If you scored low (2 or less out of 5), what are the main barriers or problem areas which need to be overcome to improve the process?

Senior management (11 responses)

• Not led by management who don't see the need for improvement
• lack of senior level support
• (lack of) management buy-in and commitment to doing this
• leaders/sponsors need to create the climate so that LL can be learned and applied effectively
• lack of commitment from the management,
• Lack of organisational buy-in, lack of clear path to improvement, too many initiatives
• . no central senior sponsorship,
• Functional management enforcing continuity of process and, therefore, lessons learned from project to project.
• Lack of appreciation of the value; management does not set the expectation; tendency to 'check the box' approach.
• senior management buy-in, no metrics, time!
• Management involvement; taking ownership for (sharing/learning) processes beyond borders of own field of responsibility. Takes continuous attention.

Culture (10 responses)

• Cultural attitude, the habit of checking "lessons learned" before starting new things
• Not seen as central to performance management
• currently culture very much on delivery not learning - process is being proposed now as part of overall KM framework rather than a separate initiative so hopefully will be more successful
• (Lack of ) willingness to conduct process
• The prevailing attitude was "this is how we have always done things and we won't change." Also, as a governmental agency, employees generally felt entitled and safe from both effective discipline and termination.
• 1. Has not become part of the culture and the way we want to do business 2. Not a good platform for sharing.
• It is not about Process and or Technology. It is about behaviours only.
• apathy. lack of belief in the system.
• Cultural resistance to flagging bad news; difference between talking the talk and having to walk the walk (corporate commitment); sheer size and scope of the organisation
• willingness to change

Lack of follow through and application (15 responses)

• No one reviews the lessons learnt, they are not part of the 'process improvement' process
• lack of immediate actions taken, lack of lessons that actually brought some visible improvement, lack of understanding how LL can benefit company and individuals, lack of incentives for doing so, the process is not very well defined and people found it hard to follow, people are confused how to find the right lesson, etc
• Besides noting the lessons down the organization does near to nothing with them. Conclusions from lessons range from "continue' to 'don't do this again” which means the lessons and mainly the conclusions are not SMART. No actions however arise from the defined lessons making it a purely 'check in the box' activity with no added value
• Poor dissemination and use of lessons learned. Often just a tick the box exercise. Where something valuable is found, this is rarely transmitted to others who need to know or embedded in the network.
• No recognised process, limited follow up, limited prevention (living in present rather than planning for
future), always something else more important,

- Improve the closure of projects and easy access to lessons learned (both people and documents)
- Lack of performance management and follow through
- being able to demonstrate re-use
- Improve the LL should leverage further for cross project sharing, improved template and common forum to discuss these (not just adding to repository)
- 1) Taking action on the learning after post-project reviews. 2) Sharing the learning more widely, beyond those who participate in review meetings.
- Sharing of the lessons learned to a wider group within the organization.
- Transferability of Lesson Learned
- Restricted audience. Hard to find the reports. Done in an inconsistent way. Can be seen as box ticking. Little top management follow up.
- Although LL are collected there is no real evidence of anybody looking at them before starting other project work. Communication. Poor search facility.
- dissemination of information and making the lessons useful

Time issues (4 responses)

- Timing is an issue - we don't immediately record them, and I believe that some are lost completely, or details are lost
- Time constrains
- (not) providing bench-time to dialogue about lessons learned.
- long approving process

Other barriers

- Finding time, and availability of consultants with the tacit knowledge, to undertake lessons learned exercises ..and to capture same explicitly. We also have a Quality Assurance process to that ensures that (client) artefacts produced out of consulting assignments are captured into assignment dbs and our knowledge db.
- (Not) formalising the process and incorporating in new work
- Currently no central access point or repository for lessons (currently in procurement),
- Concerns about litigation
- Governance behaviour and resourcing and people moving on
- (Not) formalising the process and incorporating in new work
- needing to embed in the updated process
- Rapid change of staff / redeployment at the end of projects
- not reaching the people - revamp the training material
• outcomes are dependent on having an adequate scoring system (we use automated software) and on the capability of the team making the analysis.

• Consistency in following the process.

• The organisation understands the value of lessons learnt processes, but the challenge is that they are not systematically embedded in our work or culture.

**Ranking the components of the lessons learned system.**

The respondents were given a list of components of a lessons learned system, and asked to identify whether they applied these components. The frequency of application of each component is shown below. The most common is the use of a defined process for identifying lessons from activity, and 46 of the respondents (80% of those with a lessons learned system) had such an identified process. The least common was the use of rewards to incentivise lessons submission.
Figure 6 below shows how each of these components correlates with the effectiveness score for the KM system. For each component, the blue bar represents the average effectiveness of those systems with that component. The red bar represents the average effectiveness of those systems without that component. For example, those Lessons Learning systems which include the definition of Actions arising from the lessons (the top component in figure 6) score nearly 3 on average, while those which do not include definition of actions, score less than 2. We can therefore assume that, on average, the definition of actions helps make lessons-learning more effective.

Therefore all components where the blue bar is longer than the red bar are likely, from the data provided by the respondents, to make a positive contribution to lessons learning. The greater the difference in length, the more positive the contribution.

Figure 6.

In general terms, all except 2 components seem to make a positive contribution to lessons learning. However we can (relatively arbitrarily) group them as follows
Strong positive contribution

- Actions defined arising from the lessons
- Clear high level expectations from senior management that the lessons learned process will be applied
- A method to measure whether actions have been completed and lessons closed out
- A process for validating/agreeing the actions
- Accountable person/people assigned to complete the actions
- A defined process for identifying lessons from activity

Moderate positive contribution

- A person or people to track the metrics
- An escalation method if the lesson or action needs to be addressed at a higher level
- A clear accountability for identifying lessons from activity
- A high level sponsor of the lessons learned process
- Quality assurance of this process (eg trained facilitation)
- A method for disseminating the lessons
- A lessons learned database which can hold lessons from multiple projects or units

Fairly neutral

- Quality control of the lessons to ensure they are well written
- A method to measure whether lessons have been captured
- A search function within the lesson database

Strong negative contribution.

- Rewards to incentivise submission of lessons
### Missing components

Respondents were asked which components were missing from this list. Their answers are below.

<table>
<thead>
<tr>
<th>8. What (if anything) did I miss from this list?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A knowledge baseline against which to understand whether it’s a lesson or something someone should have known anyway.</td>
</tr>
<tr>
<td>• A method for incorporating lessons into current practice.</td>
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<tr>
<td>• Understanding the benefits of learning the lessons by project taskforce.</td>
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<tr>
<td>• Root cause analysis.</td>
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<tr>
<td>• A method of sharing the lessons between various projects.</td>
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<tr>
<td>• Group awareness creation of why we use lessons learned and how we can benefit from them.</td>
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<tr>
<td>• A method for improving the LL process itself, maybe?</td>
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<tr>
<td>• You’ve got lots about capturing the lessons, but perhaps are missing something about whether anyone learns anything from them. One of our many problems is that there is no way of ensuring that these lessons that get captured are ever productively used. Too often I think they disappear into a black hole, or are not marketed internally to the people who might benefit from them.</td>
</tr>
<tr>
<td>• Database could be a spreadsheet.</td>
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<tr>
<td>• Filtering the useful lessons - i.e. quality control of the applicability of the lessons.</td>
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<tr>
<td>• Training in how to write lessons.</td>
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<tr>
<td>• Community/social aspects.</td>
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<tr>
<td>• In a company the size of (X) there are many databases and responsible people which then becomes a barrier.</td>
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<tr>
<td>• A presentation to peers and senior management of lessons learned.</td>
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<tr>
<td>• Lessons Learnt Retitled to ‘Shared Knowledge’ attributable to a negative associated with mistakes as lessons learned.</td>
</tr>
<tr>
<td>• Nothing but having these things is one thing; having them work is another. Maybe one aspect missing is whether lessons are pushed (compelled) or pulled (stakeholder buy-in).</td>
</tr>
<tr>
<td>• Easy access to lessons learned.</td>
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<tr>
<td>• The project management process uses LL for input - hence closing the loop.</td>
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<tr>
<td>• Buy-in from all involved should be there, but that’s understood.</td>
</tr>
<tr>
<td>• We embed as a part of our project QA process.</td>
</tr>
</tbody>
</table>
• Communication/raising awareness
• Feedback / presentation of the findings to the business
• Is Legal Involved. If not handled with some caution LL's may be cause for claims.
• Buy-in from the entire team
• I might include a question asking if companies are using software to capture lessons learned. In our highly IT mobilised world I think you'll find that many companies are using such systems. It removes some of the human error and bias associated with the manual capture of lessons learned
• A periodic HSE governance committee to set up a common overview of the last HSE statistics period (3 or 6 months)
• where does it go after it is finished

Lessons identification method
Respondents were asked to list the methods they use to identify lessons. These are grouped below. Many respondents indentified more than one method.

9. What is your defined process by which lessons are identified? (Please state process and context, e.g. "After Action reviews during project activity", "External reviews of programs", "Individual submission by sales staff" etc)

After Action reviews (17 responses)

• After action reviews at stage gates and ad hoc requirements
• After action reviews, reflected learning
• before, during and after action reviews for service improvement and related IT projects
• After Action reviews during project activity
• AAR, Project Stage gates assurance reviews,
• after action reviews
• AAR,
• After action reviews during and following projects
• After Action Reviews
• Formal AAR
• AARs
• After Action Review after project closure. Before During and After
• After Action Reviews
• AAR during assignments (informal);
- after action review during projects
- Developing AAR to improve the process
- After Action reviews during project activity

**Other project-related review (28 responses)**

- A specific chapter in the project completion report.
- Project/programme closure report
- Practises worth replication
- after project review to gather the positive and negative experience that is then included in end of the project report
- Lessons learned are captured in the close project activity as a mean to get a check in the box for CMM assessment approval.
- A few via Project Reviews at the end of Projects - the majority via individual submissions from inside AND outside the Organisation
- Project Board meetings usually last item on agenda
- project events (good and bad), retrospects
- Formal process associated with project execution,
- PPRs (formal).
- CVP process for major projects
- Project evaluation, workshops
- Retrospect on request for major activities
- Post project reviews. Generally a lengthy meeting to specifically review process and capture lessons-learned. Recording of lesson-learned in a word document which relies on long-term follow-up to ensure application for subsequent projects.
- Post-project reviews (retrospects).
- After a project completes when team members are recapping activities and deliverables
- Learning From Projects - post implementation;
- Peer Reviews, and Lessons Learned
- Embedded within Project Management methodology. For HSEC the process cover all the project life cycle.
- Project team does a review and write up before it disbands (This could be the only thing between them and their next job)
- Template for project LL.
- Post project workshops + Intra-project PM collation + PMO Project auditing
• Post-Mortem review meetings to assess each major release

• Review meetings held with project leaders, project workers and end users after each stage of the project. At times, a neutral facilitator to encourage submissions.

• Post (or milestone) debriefing of client projects

• Retrospect and/or interviews leading to key Beliefs

• project improvement forums

• Review meeting following bid submissions

External reviews (6 responses)

• External benchmarking,

• external reviews

• Our lessons learned (called "Good Practices) are indentified during several, audit processes, as part of daily work, as part of our COP processes and part of our TPM implementation (continuous improvement programme)

• External (QA Director) program reviews and knowledge sharing activities.

• External reviews of programmes

• External HSE system audit / inspection: especially to assess the statistics from the last lesson learned, in order to see the effectiveness of the tracking-reporting system

Learning from incidents and events (5 responses)

• Learning from incidents

• After event - event analysis and Surveillance programme

• RLI (Review Learn Improve) following reported assurance (safety, security, quality, environmental) incident

• Incident investigations

• a serious OHS incident eg potential fatality

Individual (ad hoc) submission (7 responses)

• At any time, project personnel, using their judgement, identifies "project experience". Project Manager reviews and determines if it is a "project Lesson Learnt".

• Submission by the staff after the software release has concluded

• lessons can be submitted anytime.

• individual submission

• individual submissions

• Individual submission by site staff
• individual submissions from my team which I have documented

Other

• Different, sometimes prize competition (Marketing)
• Post sales pitch reviews. Client feedback reviews. Individual submissions by client facing staff.
• there is more than one - no common way yet
• Info exchange with partners
• we're a sales-oriented company, so all our metrics are sales based.
• on-line community discussion forums and ultimate wiki form completion
• Well by well review raising concerns and discussing problems
• Constant review of processes thru metrics to discover if there are ways to improve
• Various activities take place before, during and after product development e.g. AARs, case studies, test & learn, observation, rapid improvement events. The challenge we face is not being clear on what techniques are being used by colleagues and how systematically.

Final Question
Finally the respondents were asked if there was anything additional they wanted to say. Their replies are below.

10. Is there anything else you would like to share regarding the lessons learned process? (Optional, but please feel free to share any additional thoughts)

• (I)like NASA’s (system)
• As always, the business does not provide the time to staff to learn from experience. There is always pressure to meet some deadline or get onto the next revenue piece of work.
• lessons learned and risk management might form a unified approach.
• Lessons learned is part of a broader process (HSEC, IS&T Projects, Exploration projects, contract negotiations, etc.) and how this process is embedded within the organization culture is perhaps what makes it works (or not).
• Process take up and adoption is very difficult. In the end it is all down to the individual. Few people seem inclined to participate either as a "pusher" or "puller". Pull is critical to effective lessons transfer. Systemic "pull" only seems to happen under circumstances when such is demanded and followed through by leadership or an individual feels out of their depth. Thus from the start there are big barriers to overcome in the lessons process. Many people also struggle to write clear lessons and unwittingly stray into tacit territory leaving the reader lost in terms of what the message is supposed to be.
• Action on the items seems to be hit-and-miss; we have many great discussions, but follow-up is nonexistent at times
A comparative datasheet configuration: it means to set up a dynamic mapping of the last events and the last lesson learned, in order to ensure an updated following of all the HSE process, and to ensure the effectiveness of the tracking system as a communication tool.

The process is key, especially if peers who are or were not involved in the work are included in the reviews (fresh eyes, etc.). Major issue, though, and as indicated earlier, is finding the time to undertake reviews.

Very hard to maintain, keep the momentum. Needs someone to constantly run after.

- No one likes to hear bad news. People can be very reluctant to accept that what they did was not optimal.

Major barrier to implementing actions from lessons learned is lack of suitable demonstrable benefits and time to administer the project.

The LL process somehow (should) link to Best Practices. These 2 documents together will give a better understanding and outcome of the projects - good & bad things!

In my organization, in process is on-going within the implementation of a KM structure.

Documentation of lessons-learned is often lengthy and tedious to both write and read. Tendency, therefore, to use personal experience relayed at the start of a subsequent project, rather than referral to documentation/archive.

Before any such process can take effect, one has to admit that one doesn't already have all the answers.

I'd suggest looking at the process in 2 halves. First the learning of the lesson, then the application of it in future activities.

We are teaching our customers the value and they are not getting it or using it.

Intranet site is an useful tool for exchange information about lessons learned.

good idea and helps pass knowledge onto new generations.

One of the problems we see - and results in less LL's than we would want to- is that Project Managers tend to be careful with submitting LLs due to possible claims. Another issue is that many LL's submitted are not really LLs but are personal experiences, interoffice issues and are caused by not following published company best practices. The review process is quite rigorous -which is good- and the LLs "left standing" will cause our company practices to be updated. This is highly valuable.

We achieved a culture change in some business areas to reflect and learn, but failed with introducing a process/system to transfer these due to a lack of resources and sponsorship.

Needs to be a part of all project reviews/close outs.

The example I'm using was a long time ago, but probably still relevant. It was commissioned when lessons were the latest buzz word, and lots of money was thrown at developing a technology and process, rather than change management and process support. Changes in divisional priorities and senior management left it without a sponsor.

"The lesson learned process" begins as a child when you learn the hard way not to put your finger in a light socket or touch the stove. With all candour and respect my thoughts are that using a scalpel to pull out specific processes that should fall under human behaviour and development skills you would be expected to bring to any assignment as part of your work ethic is akin to teachers programming students with the current status quo. We live in a culture with sleep disorders and eating disorders. Two basic skills that people now need doctors to help them perform? My thoughts are instead of creating more programs and systems so people can be brainless lets start with the word that launched NCR and IBM, quite simply THINK!
It's dead without management driving the process

In Hindsight establishing a Knowledge Plan at the commencement of a project would be a benefit.

Clearly in my answers above, the process of monitoring the implementation / escalation is the difficult part.

Databases don't work unless they have relevant metadata making the lessons "discoverable" and that a process to show evidence of review of the database is enforced e.g. at project sanction gate

The lessons learned process was implemented if requested by clients, usually in response to a difficult situation. However, the consultancy organisation itself did not have any formal performance management structure, and didn't see the need to consider lessons learned.

In my 7-8 years working at X, there really never was a specific lessons learned program. It was very clearly stated in the Project Management Process of the company. However, there was never a formal capturing of lessons learned into one place. There was only capturing in a small way the documents that were created for any type of a reuse program. We definitely had a strong reuse program, especially for capturing pieces of code. I think the primary barrier to doing any type of lessons learned was that leadership did not support the time allocation. Everyone had to code every hour to a project number. If it wasn't billable, you were dis-incented from spending time on it. If you weren't meeting your billable %'s you were in danger of being let go.

Helpful to have a Q&A process for compiling lessons.

The key to lessons learnt is putting that back into the organisation so that improvements can be made. I don't see the point in having a database full of lessons learnt, that no one accesses.

others in our company may have distinctly different views

Conclusions

It seems evident from the responses to this survey that a large proportion of companies and organisations are attempting to operate, or are intending to operate, a lessons learned system in some part of their organisation. However less than half are actually satisfied with the effectiveness of this system.

No one industry segment can be shown to have “got lesson-learning right”. Certainly lesson learning seems more prevalent in the oil sector and the military, but even there, satisfaction ratings are not uniformly high, and survey responses are too few to be certain.

In most cases, lessons learned is being applied to project activity, and project-related team dialogue processes such as After Action review and Retrospect are commonly used to identify lessons, together with incident investigations, external evaluations, and individual submissions. However there are many barriers to operating these processes, and even more barriers to actually following through with the learning and making a difference to the work of the organisation. The issue of re-use and re-application of lessons is a constant theme in the responses quoted here.

It seems that effective lesson-learning contains many elements, each of which has a positive impact on the success of the system, and that a successful system needs to incorporate as many of the elements as possible. These elements are cultural as well as procedural. The most important things to get right seem to be

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• Ensuring that lessons lead to action, and that these actions are followed through to application in future projects. It is probably the lack of follow through that causes the greatest frustration.
• Clear involvement by senior management, with clear expectations that the lessons learned system will be applied. Without senior management attention, time for lesson-learning is not prioritised, or lesson learning is treated as a tick-box activity.
• Formalising, defining, embedding and consistently applying the system (and there are sub-issues here, for example accountabilities, and avoiding the “tick box” mentality).
• A supportive culture (and this will be driven largely through the behaviours of leadership, and by the importance they place on lesson learning).

Learning lessons seems to be something that the majority of companies seek to do, but it seems to be easy to do badly. If a company wishes to learn effectively, they need to address lesson-learning as a complete system, they need to make sure that all elements of the system are in place from identification through to reapplication, and they need to ensure that they have the full backing and attention of senior management. From this foundation, success should be possible.
Appendix 1. Survey questions.

1. Your name, and your organisation (optional - will not be revealed, but I may have some follow up questions for you, depending on your answers, if that is OK)

Your name, and your organisation (optional - will not be revealed, but I may have some follow up questions for you, depending on your answers, if that is OK)

2. Does your organisation have a Lessons learned process in any major part of its activity?

☐ Does your organisation have a Lessons learned process in any major part of its activity? No

☐ Not any more - we used to but stopped

☐ We are introducing one now

☐ Yes

3. If "Yes", then which part(s) of activity?

If "Yes", then which part(s) of activity?

4. How effective is (or was) your organisational lessons learned process in delivering performance improvement? (if you run multiple processes, please choose the most effective)

☐ How effective is (or was) your organisational lessons learned process in delivering performance improvement? (if you run multiple processes, please choose the most effective) Not at all (0 out of 5)

☐ Slightly (1 out of 5)

☐ Moderately (2 out of 5)

☐ Good (3 out of 5)

☐ Very good (4 out of 5)

☐ Excellent (5 out of 5)
5. If you scored high (3 or more out of 5), what are the essential elements of the process that ensure it works well?

If you scored high (3 or more out of 5), what are the essential elements of the process that ensure it works well?

6. If you scored low (2 or less out of 5), what are the main barriers or problem areas which need to be overcome to improve the process?

If you scored low (2 or less out of 5), what are the main barriers or problem areas which need to be overcome to improve the process?

7. Which of the following are included in your lessons learned process?

- Which of the following are included in your lessons learned process?
- Rewards to incentivise submission of lessons
- A defined process for identifying lessons from activity
- Quality assurance of this process (eg trained facilitation)
- A clear accountability for identifying lessons from activity
- Quality control of the lessons to ensure they are well written
- A lessons learned database which can hold lessons from multiple projects or units
- Actions defined arising from the lessons
- A process for validating/agreeing the actions
- Accountable person/people assigned to complete the actions
- A search function within the lesson database
- A method for disseminating the lessons
- An escalation method if the lesson or action needs to be addressed at a higher level
- A method to measure whether lessons have been captured
A method to measure whether actions have been completed and lessons closed out

A person or people to track the metrics

A high level sponsor of the lessons learned process

Clear high level expectations from senior management that the lessons learned process will be applied

8. What (if anything) did I miss from this list?

What (if anything) did I miss from this list?

9. What is your defined process by which lessons are identified? (Please state process and context, e.g. "After Action reviews during project activity", "External reviews of programs", "Individual submission by sales staff" etc)

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10. Is there anything else you would like to share regarding the lessons learned process? (Optional, but please feel free to share any additional thoughts)

Is there anything else you would like to share regarding the lessons learned process? (Optional, but please feel free to share any additional thoughts)
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