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Knowledge in Action - Issue 29

Improving the uptake of lessons learned

Capturing lessons learned during projects is a well-established practice. So too is the use of 'lesson learned' databases to store and disseminate these lessons. Yet many organisations remain dissatisfied with the return on their investments in such activities, seeing evidence of repeated failures to learn past lessons.

Research by the Henley Forum has examined why this might be so. Looking at real-life lessons learned programmes, the research highlights what constitutes good practice at three critical stages during the lesson learned process: lesson capture, framing lessons for subsequent learning, and making those lessons available to the broader organisation.

Routinely, organisations try to capture useful lessons to be learned from experience during projects or activities. A project finishes; the team reviews what happened; team members identify and write-up key lessons that others might learn from; and documents are then stored where other people can re-use the knowledge.

The reality is more prosaic. Time and again, the evidence shows that the learning does not spread. Mistakes get repeated. And actions which should have been modified by past experience remain uninformed—sapping productivity, morale, customer satisfaction, and profitability.

The Henley Forum investigated why this happens. The main conclusion: in 'lessons learned' programmes, disproportionate attention is given to capturing the lessons, while the mechanisms that will subsequently help others to learn from them are neglected. If lessons learned are to be successfully disseminated, more thought needs to be given to what potential learners need to know so that capture and diffusion processes work more effectively.

Understanding the dimensions of the learning process

What constitutes a lesson? In an organisational context, this simple definition works well:
"A lesson learned is a new significant behavioural norm uncovered by experience that can improve a business activity if disseminated and applied in the right circumstances."

So why wouldn't people wish to seek out and profit from these new behavioural norms? It would seem obvious that no one would willingly run the risk of making mistakes if they could avoid them. In fact, the reverse appears to be true; four identifiable reasons for ignoring lessons are regularly observable:

- Arrogance: "I am in this position because of my expertise, so I probably know better; and besides, I might have to 'unlearn' some of what I know."
- Ignorance: "I am blind to the fact that I have anything to learn, or feel unable to challenge someone who appears more knowledgeable."
- Time pressure: "I haven't got time to look back at past lessons. I need to get on with the action."
- Habit: "It's just easier and more interesting (and keeps me employed) if I keep doing things the way that I always have done."

So how best to break down these avoidance tactics, and thereby render people more open to seeking out—and learning from—the experiences of others?

Past research highlights three distinct 'routes to learning' that enhance the probability that behavioural change will occur:

- **Learning from experience**. Here, we have an experience ourselves, reflect on it, relate it to other concepts, and come up with an abstract rule to guide our future behaviour.
- **Situated-learning between others in a similar position**. Collective or communal activities that offer people the chance to converse with like-minded individuals—who might be experiencing similar problems to ourselves—open up a space for learning. Insights then emerge through these interactions, helping us to devise new ways of working.
- **Analogical learning**. Here, learning comes from comparison with analogous situations that we might encounter, or through the use of metaphors to highlight similarities between superficially different situations. Profound 'aha!' moments can emerge, triggering enough excitement or concern to motivate us to take learning to the point of making behaviour change.

Framing lessons effectively

Framing lessons in the light of these routes to learning is important but not enough. Simply put, when the message in a lesson has to influence people in another part of the organisation, distanced from the immediate experience—who may have different incentives to learn, will have different prior experiences, and probably use different terminology—then the mechanisms for dissemination need to be designed to both engage and interest them. It should be shared in a way that helps them translate the message into something they recognise as relevant to their circumstances.
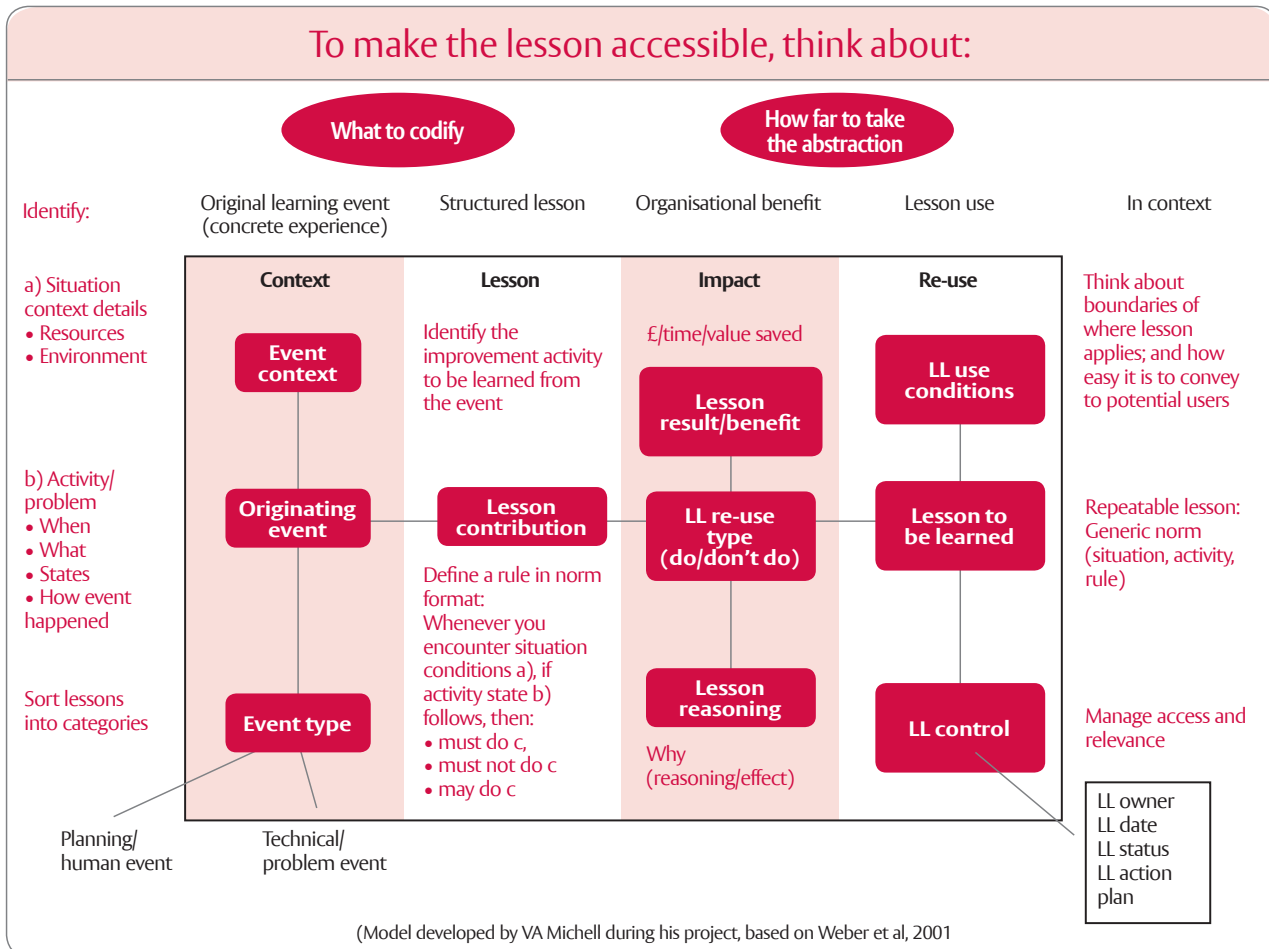
The translation process tends to be most difficult when the important lesson is something really novel that arose in unfamiliar territory for the original learner, especially if the rawness of this experience hampers their ability to describe it concisely. Equally, if the context in which a subsequent learner works is radically different from that of the original learner, then their ability to communicate will again be hampered by a lack of understanding of what really matters in each other's contexts.

A study of some 70 lessons learned submitted by seven Henley Forum member organisations highlighted a wide variety of practice in terms of framing lessons—including different interpretations of what a lesson learned actually was. Sometimes the lessons were just explanations, or a simple list of project do's and don'ts; others were more complex and relating to lessons learned from addressing technical problems. And even when the lessons had been captured in a standard template, very often the content provided was incomplete.

Typical gaps were instances where the captured lessons failed to provide the contextual information necessary for a future user to be able to establish the relevance to their situation; lessons not specified in the form of a standard rule or principle which is easy to follow when a

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To make the lesson accessible, think about:

What to codify

How far to take the abstraction

Identify:

| | Original learning event (concrete experience) | Structured lesson | Organisational benefit | Lesson use | In context |

a) Situation context details
• Resources
• Environment

b) Activity/ problem
• When
• What
• States
• How event happened

Sort lessons into categories

| Context | Lesson | Impact | Re-use |

Context
- Event context
- Originating event
- Event type

Lesson — Identify the improvement activity to be learned from the event
- Lesson contribution

Define a rule in norm format:
Whenever you encounter situation conditions a), if activity state b) follows, then:
• must do c,
• must not do c
• may do c

Impact — £/time/value saved
- Lesson result/benefit
- LL re-use type (do/don't do)
- Lesson reasoning

Why (reasoning/effect)

Re-use
- LL use conditions
- Lesson to be learned
- LL control

Planning/ human event
Technical/ problem event

Think about boundaries of where lesson applies; and how easy it is to convey to potential users

Repeatable lesson: Generic norm (situation, activity, rule)

Manage access and relevance

LL owner
LL date
LL status
LL action plan

(Model developed by VA Michell during his project, based on Weber et al, 2001)

particular set of circumstances arises; lessons that lacked categorisation of where the lesson might be applicable (thus limiting searchability); and lessons written-up using language with which the next learner might not be familiar. Finally, another issue was instances where no contact details were provided in order to enable the subsequent learner to refer back to the originator.

How can such shortcomings be avoided? A model developed by the Henley Forum researchers (see graphic) provides a template to help those drawing up lessons. To make lessons accessible to the widest possible group of future users, it advises following a four-step process:
• Identify the context of the event that triggered the lesson in terms of the situation details.
• To avoid ambiguity about what future action is required, specifically frame the lesson as a rule (or norm) for future behaviour. Eg, when this situation is encountered, it is important to do this, and/ or not do that.
• Establish the value or benefit of the lesson (i.e. what and how much will be saved in terms of time, money, lives) in terms of its beneficial business outcomes.
• To aid re-usability, identify in a simple but easily understood way the situations and conditions in which the initial lesson will apply.

Connecting the lesson to the learner

To support the process of getting lessons to different learners, a spectrum of diffusion mechanisms is required. This is not to suggest

that a carefully-curated 'lessons learned' database be abandoned—rather, it is about building a spectrum of different mechanisms that might be able to excite interest in the value of a lesson and better suit the learning style of groups of future learners.

Storytelling is one such mechanism. For generations, storytelling has been man's most enduring technology for sharing important lessons: a good story will incite change either because it presents an exciting vision of possibilities, or because it arouses some frisson of concern. Both motivate the learner to do something differently.

Moreover, stories are a powerful way to diffuse a lesson learned. They can be used in a formal context, by capturing them for re use in audio, video, drawing, or text. Or, less formally, they can be used informally in conversations, workshops, and group discussions—anecdotes describing experiences, and drawing out appropriate lessons.

But for many in business, storytelling is a lost art. For those who want to use storytelling as a mechanism for disseminating lessons to a wider audience—but aren't sure where to start—it is useful to remember that all good stories (especially in a business context) have four distinct elements:

• **What happened?** The facts and the forces at play in the experience give some sense of veracity to the story.

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Kate's story

A widow's video, posted on YouTube, makes for tough but memorable watching. In it, Kate Carpenter describes how her husband, bridge engineer John Kinns, died because he stopped off on route to a meeting, in order to measure the length of the parapet of a bridge that he was redesigning.

He was alone. No one knew he was there. And the belief is that the tape measure that he was using somehow hit electrical cables for the railway line below the bridge, leading to a shock which killed him.

A few years on, Kate—an engineer herself—decided to share the lesson through her story. Then, by learning from her, no one would ever have to go through what she did. She created a video of herself talking about both her husband's accident and her loss.

The video evokes a very strong emotional response in most who watch it. But it is that very response that makes the story hit home, and become unforgettable. Engineering companies now use it at the start of meetings to highlight the emotional cost of not paying attention to health and safety issues.

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- **To whom did it happen?** Especially when the events in question happened to the storyteller, this provides a sense of identification.
- **How did they feel?** Emotions and perspectives make the story personal, creating a human connection which resonates with the listeners.
- **What were the lessons?** When the listener empathises with the way that the learner felt about the experience, and their perspective of it, they are prepared to take the lesson to heart.

Finally, consider how best to connect lessons to learners. A useful perspective is to think of a spectrum of learning opportunities, stretching from serendipitous 'social' connections at one end, to formal processes at the other.

At the serendipitous end of the spectrum you might think about communities of practice, 'ice-breaker' meetings, knowledge cafés, and lunch lessons. Here, the trade-off is that while the impact of a lesson may be greater, the opportunities are more random, less structured, and typically involve potential learners initially asking questions.

At the formal end of the spectrum are diffusion processes that reflect the expected importance of the lessons concerned to the broader organisation. Here we find searchable databases of good practice, expertise directories, training, knowledge audits and formal re use of company knowledge (ROCK) processes that ensure the necessary knowledge is deliberately fed to relevant users. Again, there is a trade-off: searchability and ready access to lessons, versus a potentially cost of systematising the process.

In between the two ends of the spectrum lie variously nuanced alternatives—internal job rotations, internal conferences, action learning, and 'peer assists'.

How to choose the most appropriate diffusion mechanism for a particular lesson? In short, the importance of the lesson itself usually provides guidance as to the answer: disseminate lessons with most significant organisational value by investing in formal systems that feed lessons; use more opportunistic routes for lessons likely to have less impact.

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