



Lessons Learned: a tool for reflection and learning

What do you do when you get to the end of a phase of work? Do you typically convene a meeting to review the experience and distil lessons for application in other contexts?

When you are busy with the preparation process for launching a new initiative, how often do you include a structured look back at earlier efforts for relevant lessons?

If your answer to both scenarios is “Not Typically”, then you are in good company – in that most organizations do not employ structured processes to review and reflect on their work. And like most of your peers, you are missing out on a great opportunity to gain insight into the things that can help you succeed, or can prevent you from succeeding in the future.

There are many different ways that groups and teams can reflect on their work experiences. One practical way of doing so is through a “Lessons Learned” process. It provides a structured way for a team to review its work and identify relevant lessons at the end of a significant piece of work. The benefits of doing this include:

- bringing closure to your work,
- being able to transfer lessons quickly to the next team to do something similar,
- providing a quick and effective way to capture the knowledge before the team disbands, and
- identifying relevant insights to guide your next phase of work on an ongoing task.

At its core, the structure of a Lessons Learned meeting is relatively simple. However, it has the capability to hold discussions about complex matters, and to contain the feelings and emotions of the people involved in the discussion. As with any reflective meeting (or review meeting), care should be taken for the people involved. The purpose of the Lessons Learned process is not to ascribe blame or to rehash old conflicts, but to adopt as objective a perspective as possible in looking for lessons from past experience.

The three steps

There are three main stages in a Lessons Learned meeting:

1. Revisit the team’s objectives and deliverables, and identify the hypotheses made at the start by the team about what it would take to be successful.

There are a number of reasons for doing this. It helps to remind people what the starting objectives and assumptions were (as these may have changed over the duration of the task). Not everyone in the meeting may have been present at the starting point. It establishes a common reference point of the scope of the task. It can help clarify the point in time when the task was initiated (you would be surprised how often there are disagreements about this!).

Making the initial hypotheses explicit is also helpful to remind participants about the mood at the time – was it optimistic or pessimistic? What was going on in the organization and the wider world that gave people hope that this strategy would succeed?

2. Ask what went well. Ask ‘why?’ several times.

Things were accomplished, and progress was made. It may not have been all that was intended or desired, but it is likely that there are some positive outcomes and developments that can be traced to the task. Identifying them and making them visible allows participants to feel appropriate pride in their efforts.

The next step, asking the question ‘Why?’ more than once, is important to uncover the reasons for success. The use of the probing question is deliberate, and it aims to test the ‘theory of success’ that was initially held with the reality as it was experienced. It is very likely that this step will reveal a number of practical insights that can be repeated in upcoming work.

3. Ask what could have gone better. Ask ‘why?’ several times.

Not everything that was planned happened, and it is likely that a number of unplanned developments had to be incorporated into the group’s work. The purpose of this step is to help the group have honest discussions with one another – there may be different perspectives on what was considered as not going well.

The use of the probing ‘Why?’ question once again is intended to take participants beyond a cursory explanation of what went wrong. It may well be that there were forces beyond your control that affected your work, but it is important to explore whether the impact was inevitable, and whether anything could have been done to minimize its impact.

This component often delivers the most useful insights, and care should be taken that the lessons emerging from this part of the meeting are reframed in a positive construct – so the future focus will be on what to do, rather than on what to avoid doing.

Who should participate?

The Lessons Learned meeting should be open to as large a group as practical. If there are interested participants who had no active role in the task being reviewed, encourage them to serve as observers and ‘meaning-makers’, and to capture the lessons that may be implicit in the discussions of the active participants.

The Lessons Learned process can be a rich opportunity for a team’s experience to inform the practice of other teams engaged in similar work and the efforts of the institution as a whole. An investment of as little as two hours can yield many benefits for everyone involved, as a culture of ongoing learning and continual improvement is promoted.

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