



December 2013 - Effective Management of Lessons Learned



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Professional Lessons Management software now

A system of "Lessons learning" forms part of the core Knowledge Management Framework for most, if not all organisations.

However modern models of lesson learning now go a long way beyond the old model of "stick the lessons in a database, and hope someone finds them".

In this newsletter we look at how to Make Lessons Work, and introduce a new technology to help you - the [Lessons Management Hub](#)

Taking lessons through to action

There are three main steps in Learning a lesson – Identification, Action, and Institutionalisation.

Identification means the review of activity, to derive learning points. A team looks back on a project or an event, and identifies where there was a difference between what was planned or expected (either a positive or negative difference) and then, with the help of a facilitator, discusses the root causes behind what happened, and what can be learned as a result.

At this stage we have new lessons in the form of "Lessons Identified" - lessons which others can choose to look for and learn from - but the lesson is not yet Learned. For learning to take place, we need to move into Action.

Action means taking action as a result of that learning. generally



[Nick Milton.](#)
[Knoco UK](#)

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Our partner company, Lesson Learner Ltd, has now released new lessons management software, to give you the security that your hard-won lessons will be carried forward into action.

[See details here](#)

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either to fix something immediately, or to update a process or practice or procedure. Think about an identified lesson coming out of a Retrospect, or an After Action review. You have usually either learned a way to do something for the first time, or a better way to do something, or a new way NOT to do something. Therefore the action is to update the process documentation (or, if no documentation exists, to write it). If the lesson is validated and the action taken, then the outcome will be improved processes and practices.

Institutionalisation means embedding the improved practice in the working habits of the organisation. You need to ensure the new or improved process reaches the people who need it, and that they act on it and adopt it in their activity. This could include broadcasting the change in a newsletter or blog, ensuring people are subscribed to an automatic feed for process updates, incorporating the new process or doctrine in training, talking through the new process in briefings, and toolbox talks, and many other approaches.

Until the lesson finds its way back into business activity, we can't say that it is learned. And it won't find its way, unless these three steps are taken.

Lessons Management Technology

If effective lesson learning means that lessons need to be converted into actions, and institutionalised into company processes, effective lesson-learning cannot be supported by a passive database.

Instead, we need an active lessons management system, that can direct the flow of lessons through to those who need to take action.

Our partner company, [Lesson Learner Ltd](#) has developed just such a lessons management technology, called the **[Lessons Management Hub](#)**.

In this technology



[Ian Fry](#),
[Knoco](#)
[E Australia](#)

Lessons are consistently carried through into action, and embedded in organisation process. Unlike a passive database, which relies on people coming to look for the lessons, LMH ensures each lesson is assigned an action, and automatically routes these to the action-holder by email. The lesson is not "closed" until all actions are taken.

1. **Lessons are recorded in a consistent format.** LMH records lessons using a consistent set of text fields, based on current best practice in lesson systems, ensuring the lessons contain all the context and details they need to be reusable.
2. **Lessons are consistently tagged and categorised.** Each lesson is tagged with a set of consistent parameters which you set up for your organisation.
3. **There is a quality control step for lessons.** Each lesson passes through two gates - an approval of the text (to weed out poorly written lessons) and a validation step (to ensure the lesson is of high value, and that the action is correct). These steps can be combined.
4. **Individuals can subscribe to notification about certain types of lessons.** Unlike passive systems, LMH allows people to be actively notified of any new lesson in their area or topic of interest.
5. **The flow of lessons can be tracked and monitored.** The lessons management team can generate a suite of reports that allow them to oversee the lessons process and identify where lessons are being generated, where they are being taken into action, and where they are held up in the system.
6. **Closed lessons are archived.** Instead of a database clogged with old, duplicate and out-of-date lessons, LMH archives all lessons once the actions are complete and the learning has been embedded into training, procedures or specifications.
7. **An administrator can configure the system to suit you.** Your own projects, operational locations, lesson taxonomy, risk management system and so on can all be programmed into the system to suit your needs.

[Visit Lessonlearner.com for more details](#)

When we teach classes on lesson-learning, we always tell people to think of a lesson not as something you have learned, but as something you can teach.

This means that if the knowledge provider is interested in effective transfer of their knowledge, they should think through carefully what the receiver needs to know. They should think about



[Stephanie Barnes, Knoco Canada](#)

Explaining the context,

- Telling the story,
- Getting to the root cause,
- Showing why the knowledge is important, and
- Providing their best help and advice, based on their own experience

This is not always easy - the "[curse of knowledge](#)" means that it is very difficult, once you know something, to put yourself in the mindset of somebody who does not know it. However the more the lessons management system fills up with poor quality lessons - lessons that do not teach - the less likely people are to use it and to trust it.

Therefore any effective lessons management system such as the [Lessons Management Hub](#) includes an approval step for lessons, to make sure lessons are not made public in the system until they have gone through a certain level of quality control.

The link between lessons learned and Best Practice



[Tom Youna.](#)

Someone last week asked me, what's the difference between Best Practice, and Lessons Learned. Now I know that some KM pundits don't like the term "Best Practice" as it can often be used defensively, but I think that there is nothing wrong with the term itself, and if used well, Best Practice can be a very useful concept within a company.

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So let's avoid the issue of whether Best Practice is a useful concept, and instead discuss it's relationship to lessons learned.

My reply to the questioner was that Best Practice is the amalgamation of many lessons learned. If we believe that learning must lead to action, and that lessons are the identified improvements in practice, and that the actions associated with lessons are generally practice improvements, then it makes sense that as more and more lessons are accumulated, so practices become better and better.

A practice that represents the accumulation of all lessons is the best practice available at the time.

Therefore the role of lessons learned is to keep best practices continuously improving, and the actions associated with lessons, in a technology such as the [Lessons Management Hub](#), are very often actions to update the current Best Practice. This practice will only be "Best" in any given context, which is why it is vital to capture the context explicitly, which is ensured within the Lessons Management Hub.

The role of Validation in lessons management

If you have a system such as we describe here, and lessons are systematically used to update Best Practice, then there needs to be a validation step involved.

Not every lesson will be correct, not every change will be desirable, and not every action will be possible. Therefore the lessons workflow needs a step where you can weed out

the contradictory lessons,

- the lessons which are merely a reinforcement of what we already know,
- the actions which would do more harm than good,



[Ian Corbett](#),
[Knoco S](#)
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- the recommendations which have been tried before and which didn't work, and
- the changes which are too costly, too difficult, or where the time is not yet right.

In the [Lessons Management Hub](#), the Validation step is applied in moving a lesson from Draft status to Approved status.

A Military model for Learning Lessons

The British Army's 'learning hub' is the Lessons Exploitation Centre (LXC) a team of several full-time staff with accountability for the lesson learning process. Its role is to receive information feeds from theatre and elsewhere (including weekly reports, post-accident or incident reports and, as part of Mission Exploitation, Post-Operational Reports and Post-Operational Interviews) and make deductions from the combined material which can support the soldiers deployed on operations, or inform capability development.



[Rupert Lescott](#),
[Knoco UK](#)

Within 30 days of returning from an operational deployment, units are required to identify and record lessons in a Post-Operational Report which is reviewed by the LXC lessons team. This is a quality control step, ensuring that lessons are clear and assigned to the correct department for further action.

Following further analysis, a Post Operational Report is socialised to a wider audience across Defence. Once this second validation step is complete (following a little horse-trading to get staff to agree on their lessons allocation), confirmed lessons are entered into the Defence Lessons Identified Management System (a Lessons Management technology as described by Ian Fry above), and staff action to 'learn', or institutionalise, the lesson can begin.

Crucially, lessons are not considered 'learned' until these actions have been taken, changes have been made and have been seen to have the desired effect.

Roles within the lessons management process

A complete lesson learning system will need a set of roles to support it.

There needs to be an operational role, for collecting observations and lessons, through personal observation or through interviewing or facilitating meetings such as AARs. This role can be known as a Learning Engineer, a Learning Historian, an Operational Learning team, etc.



[Kerry Neill,](#)
[Knoco W](#)
[Australia](#)

A role, or set of roles, is needed for managing the Lesson lifecycle once the lessons have been documented. This could be known as the Lessons team, or in the case of the British Army, the Lessons Exploitation Centre. These roles ensure lessons are quality controlled, validated, actioned, acted on, and closed out. They are accountable for, and report on, the effectiveness of lessons learning.

A role may also be needed for collecting observations from a variety of sources, and converting these into lessons. This is sometimes referred to as an Analyst role, and is often seen in military and government organisations. It is part of the LXC described by Rupert above.

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