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## Where Do Lessons Go to Die?

*Projects@Work*

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**Although many organizations are adequately capturing lessons learned, they often struggle with learning and reusing them on current projects. A detailed analysis of the lessons-learned programs at three organizations uncovered these nine best practices that can help you and your team share and find all those lost lessons.**

For all their popularity, lessons learned programs regularly fail to deliver the intended results. Lessons may be captured, but they are not absorbed or applied even within the same project, much less elsewhere in the organization. In 2009, the American Productivity & Quality Center (APQC) launched a collaborative research study — *Cutting the Cost of Not Knowing: Lessons Learned Systems People Really Use* — to study this problem and identify the critical success factors for an effective lessons learned approach.

APQC's hypothesis was that many barriers to success arose from the lessons learned process itself. Some of the study team's suppositions about the challenges posed by lessons learned included:

- > Context — If lessons are captured or documented without the proper context (e.g., description of project, equipment specifications, political environment, scientific data), then the end-user who is looking for lessons to apply to his or her project cannot apply the lessons properly.
- > Storage and retrieval — Organizations often have lessons learned databases or repositories where lessons go to die because they were not submitted properly and therefore could not be retrieved to be applied elsewhere in the organization.
- > Understanding the customer for the lesson — Is the customer the *current* team that is in the midst of the project, or is the customer the *future* project manager or team working on a similar problem or task? Or both? A clear understanding of the customer for the lesson drives the objectives of the lessons learned program, the development of any templates or tools, and the necessary process and impact measures.

To test these assumptions and uncover proven practices, APQC performed a detailed analysis of the lessons learned programs at three best-practice organizations: Credit Suisse; the U.S. Army Armament Research, Development, and Engineering Center; and the U.S. Army Center for Army Lessons Learned.

The study team uncovered the following **nine best practices**:

**Determine the Strategic Objectives.** When an organization designs a lessons learned process, there are two primary strategic paths that the organization can pursue. The first involves supporting current process or project teams with a lessons learned approach built into the project or process methodology, whereas the second involves creating a mechanism by which lessons are made available to future projects or users. In order to identify the best approach, an organization must define how lessons will be used. Ideally, an organization will choose to travel and enable both paths, recognizing that each requires different processes, people, and investments.

**Align the Approach with Process Excellence.** Regardless of the strategic objectives guiding an organization's lessons learned approach, the journey is enhanced immeasurably if the enterprise has a widely deployed and mature process or project excellence methodology. Not every organization will have this advantage, but a process management orientation drives and enhances a lessons learned approach.

**Create Governance Processes and Clearly Defined Roles.** Governance is a critical success factor for an effective lessons learned program: It provides a well-defined structure for oversight and execution of a common approach, enabling an organization to optimally coordinate resources and manage lessons learned activities. The location of the process within the organizational structure is less important than that the process be owned by a single group or office. In addition, all stakeholders should know who has accountability for the process and what roles are responsible for supporting and/or executing the various process components.

**Integrate the Approach into Core Processes.** Any effective lessons learned process relies on well-defined, well-managed, and properly resourced lessons capture events. By integrating the lessons learned approach into project planning, initiation, execution, monitoring, and closeout procedures, best-practice organizations ensure that key experiences are captured for future projects or teams. When the capture and reuse of lessons are viewed as critical components of the work, employees are much more inclined to turn to lessons learned for guidance.

**Leverage Facilitators at Key Points.** Most successful lessons learned processes focus on human interaction. Trained moderators are experts at extracting and distilling lessons, and project participants are more likely to share the “full story” about what went well, what went wrong, and how problems might have been averted when they participate in face-to-face lessons learned capture events. For these reasons, facilitated transfer of lessons learned is considered a critical success factor by many organizations.

**Make Captured Lessons Easily Accessible.** Lessons should be readily available to employees interested in discovering how previous experiences may inform their efforts. Most organizations accomplish this through a well-designed content management strategy enabled by a technology portal, but some may need to offer multiple modes of access.

**Review and Publish Lessons in a Timely Manner.** Within any lessons learned approach, the ability to take advantage of past experience is directly proportional to the speed at which that experience can be captured and made available to others. Best-practice organizations develop processes for publishing lessons quickly without compromising review and validation procedures.

**Encourage Participation.** To ensure that the right people are engaged in the process and reusing lessons learned, organizations should provide process training, set clear expectations, help employees recognize opportunities for reuse, and build lessons learned into performance review objectives.

**Measure Progress and Impact.** Performance and impact measures are crucial to any knowledge-sharing approach, including lessons learned. The right combination of measures helps track progress and paints a compelling picture for the lessons learned process team, project team members, and business leaders and executives. Factors to consider when designing a measurement program for lessons learned include source vs. recipient measures, process vs. impact measures, and individual vs. organizational reuse. Knowing the extent to which lessons learned are being integrated into daily work can encourage participation and spur process improvement.

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