

# METHODOLOGY FOR LESSONS LEARNED DOCUMENTATION

Draft Version

## Our core business:

To deliver value to our Member States through programs, projects and services.

## The link between lessons learned and our core business:

Capturing lessons learned is essential for helping us to identify good practices, avoid repeating errors, and to tap into the cumulative knowledge we have as an Organization and to use that knowledge to strengthen our programs, projects and services.



Lessons learned are generally understood to be knowledge or understanding gained by experience (positive or negative), and may be derived from projects, programs or activities. The lesson must be significant in that it has a real value or assumed impact on operations; it should be valid – that is factually and technically correct and it should be applicable in that it identifies a specific action to be taken, replicated, avoided or adjusted.



Lessons learned documentation should be able to capture the “knowledge or understanding gained by experience” and repurpose that knowledge so that it can be used to create value for the Organization.

It should identify best practices for future use, sharing them with the rest of the organization, so everyone can learn from them.

The challenge is to create meaning from the stories and experiences shared, so that people in the wider Organization can connect to it and can apply it.



## Critical knowledge – creates value

To be effective lessons learned documentation must identify what is critical knowledge for our Organization, what is that “knowledge needed to create value for the Organization”.

Critical knowledge is transient – that is it is the knowledge needed now. This requires delivering it effectively to those who can use it to create greater value for the Organization. (It is what we need, when we need it and for the people who need it.)

# STEPS

## 1. Planning to ensure relevance and usefulness of knowledge captured

Focus the lessons learned project by asking the following questions:

- Who is your audience?
- What they do will with the information you provide? How will they use it?
- What is the best format for presenting knowledge captured for that audience?
- How would this knowledge feed back into the workflow?

Take time to explore these questions with project stakeholders to determine who the audience is and what critical knowledge is for that audience.

## 2. Defining the questions - Learning begins with finding the right question.

- Brainstorm as a team about what is it that the wider Organization wants to know about preparing for missions for example.
- Ask questions about the different phases of the project such as: planning, defining scope, resource and budget management, risk management, reporting, revisions to the project, stakeholder relations and communication, team communication, and the quality of final project outcome.

## 3. Knowledge capture - Knowing what worked well is just as helpful as knowing what didn't!

### Some basic questions:

- What went well?
- Which strategies and procedures contributed to success?
- What didn't go well?
- What would you do differently?
- What should we start doing?
- What should we stop doing?
- What should we keep doing?
- What's still causing us trouble?
- What do we need to learn more about?

### Go deeper:

- What problems did you encounter and how did you solve them?
- What cause-effect relationships did you notice?
- What insights did you pick up on how work processes could be improved?

Include all experiences. Be sure to include positive as well as negative experiences in the lessons learned document to add the highest value to all the future projects in the organization. Involve all stakeholders (project team, beneficiaries, local counterparts etc.) in the knowledge capture exercise. Make a list of all relevant stakeholders, as this will help ensure that key lessons from different perspectives are captured in the document.

#### **4. Making meaning and identifying lessons learned**

To distill the meaning and to help draw out critical knowledge:

- Look for trends, parallels, patterns and connections
- Stories about process

Review the narratives and data collected and create a brief summary of the findings. Remember to analyze with stakeholders the trends, parallels, patterns, repeated explanations and stories about process to help identify key lessons.

#### **5. Application for the wider Organization**

To capture broadly applicable knowledge ask the following questions:

- Can we derive or abstract a higher lesson from this?
- What are we doing here at a higher level – can we capture higher principles at work?
- What business are we really in?
- How can we create greater value?

#### **6. Knowledge continuity – helps determine what should be documented**

- What constitutes mission-critical knowledge that should be preserved?
- What are examples of irreplaceable knowledge for the mission?
- What kinds of knowledge do the most experienced and valuable team members hold?
- Where is this knowledge located and is it accessible and transferable?

#### **7. Categorize lessons learned – connect critical knowledge to day to day work**

Categorized by type of lesson learned for example: planning, scope, resource and budget management, risk management, reporting, revisions to the project, stakeholder relations, communication, etc.

Develop your own categories relevant for the kind of knowledge you want to capture and disseminate. When creating categories consider the following:

- What kind of impact does this knowledge have on the Organization?
- If this knowledge was not available what important processes would be affected?

#### **8. Presenting the lessons learned**

Disseminate the lessons learned to create value, by facilitating:

- Peer-to-peer conversations between team members
- Conversations between different teams / missions
- Creating a taxonomy (one that change be updated or added to) so that lessons learned as easily findable.
- Consider various formats for presenting the information: podcasts, documentary, videos etc.
- Store your lessons learned document in a central repository in your organization

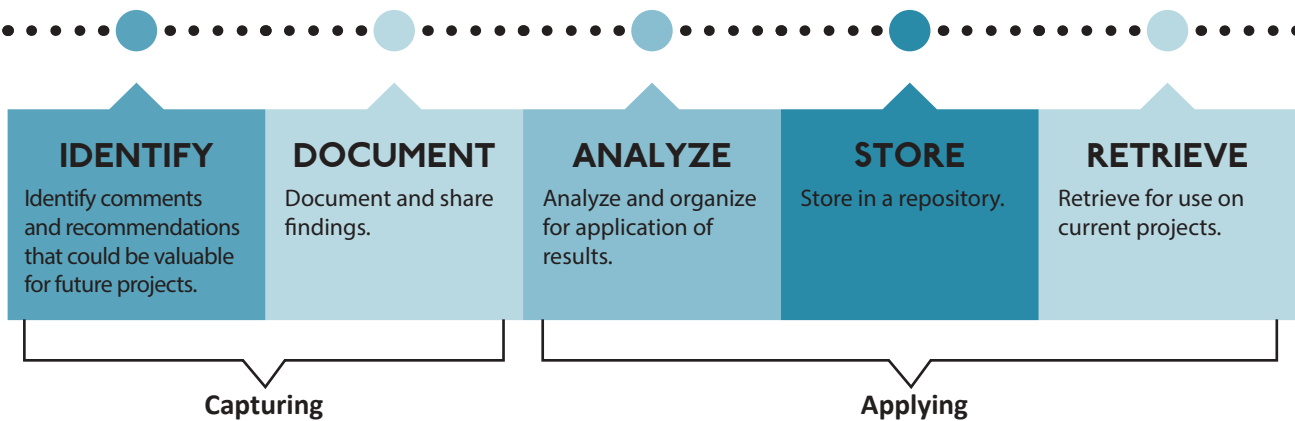
# THE LESSONS LEARNED PROCESS

All lessons learned materials should be made available for discussion, study and considered for application in all relevant programs, projects and services.

The knowledge should be shared with teams that need it.

Conversations should be facilitated around the lessons learned to create new knowledge.

Lessons learned should be included in the work flow of comparable projects, processes or services, where relevant.



## SOURCES

Applying lessons learned  
<https://www.pmi.org/learning/library/applying-lessons-learned-implement-project-8344>

Brown-Grant, Johel. 28/06/2019. Presentation: Storytelling as a Km Methodology. KMDC Meeting

4 Keys to Momentum in KM  
<https://www.kminstitute.org/4-keys-momentum-km>

Learning from Dirt Bikes  
<https://www.kminstitute.org/blog/learning-dirt-bikes>

Measuring the Effectiveness of Your Knowledge Management Program  
<https://www.kminstitute.org/blog/measuring-effectiveness-your-knowledge-management-program>

Why And How To Document Lessons Learned (With Lessons Learned Template)  
By Natalie Semczuk 21/09/2017  
<https://thedigitalprojectmanager.com/project-management-lessons-learned-template/>