Chapter 2
Learning Lessons for Organizational Learning, Process Improvement, and Innovation

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ABSTRACT
The lessons learned process provides a methodology for groups and organizations of any size to become better at what they do. Its beauty is in its simplicity and versatility. It can be used by individuals, small- or medium-sized teams, and any-sized corporations. What makes it differ from other process improvement or evaluation methods is the focus on the capturing and analysis of lessons by the very people who experienced the learning situations and those people who will benefit from future adaptations. As such, the lessons learned process is linked to organizational learning and, at its very best, will inspire innovational changes that lead to excellence. This chapter defines and scopes lessons learned; describes the basic methodology, applications, and types; and provides anecdotal examples of three scales of the process.

INTRODUCTION
Organizational learning and improvement can take many forms. Processes can often report to be about “Lessons Learned”, whereas in reality many are not. As we will see in this chapter, lessons learned involves much more than identifying what went wrong and what could be better; it requires an organization and personnel engaged in the learning process. The need to avoid previous mistakes and do something better in the future seems obvious. But how does one start? How do you do it? What exactly is the objective of the process? What are the steps? Who initiates, who leads and who participates? What results and impact are desired? How can we be assured that the lessons are really “learned” and not resting on the proverbial shelf? All these questions need to be
explored up front, long before the event, project or activity takes place. How they are answered will point to the methodology to use.

There are many ways to skin a cat, as the saying goes, and learning lessons is no different. Firstly, it is wise to determine early on whether this is the best track to follow for a given organization or requirement. This chapter will look at what lessons learned are and can accomplish and what they are not; sometimes the need is for an outside evaluation, a legal inquiry, or process improvements. Next, in determining the desired outcomes, it is important to know what you are looking for. There is no point in addressing shortcomings with recommendations for improvements or change if all the organization wants to hear in the end are best practices or success stories. If, however, the need is for a way to gather, analyze, recommend and galvanize action, there are a number of ways to proceed.

The beauty of the lessons learned methodology is that it can be adapted for any situation and number of participants. It can be done in an honest and introspective fashion by individuals, small informal groups, large formal groups, corporations and even by meta-organizations (an organization of organizations).² Often the process has to be adapted according to cultural or cross-cultural parameters because what works in one organization might seem trite in another. Whatever the style, the methodology is based on similar and simple premises: 1) open and honest input from those who were involved; 2) a collective desire to learn and improve; 3) a no-fault approach, i.e., no one is blamed for errors; and 4) the commitment from decision-makers in management to make meaningful changes based on the recommendations. Various methodologies of the lessons learned process will be described and compared, followed by three anecdotal examples of how some of these have been used in situations of varying levels of complexity and numbers of participants. The objective of the chapter overall is to provide the reader with an understanding of which lessons learned methodologies can be and should be used for organizational learning, process improvement and innovation.

BACKGROUND

Definitions of lessons learned have been adequately collected elsewhere (Milton, 2010) and do not require re-examination here. In general, however, it is agreed that a lesson is not really “learned” until organizational behaviour has changed indefinitely. The lesson itself is the result of identifying desired effects and outcomes by analyzing observations from experience. Perhaps it is more useful to describe, as NATO has done, the purpose of the overall process:

The purpose of a Lessons Learned procedure is to learn efficiently from experience and to provide validated justifications for amending the existing way of doing things, in order to improve performance, both during the course of an operation and for subsequent operations. This requires lessons to be meaningful and for them to be brought to the attention of the appropriate authority able and responsible for dealing with them. It also requires the chain of command to have a clear understanding of how to prioritise lessons and how to staff them. (NATO, 2011, p. 1).

Lessons are, after all, about learning: what one comes to know or understand as a result of study, experience and reflection. When the learning is commonly accepted or acknowledged, it becomes corporate “justified true belief”² or knowledge. The literature in the domain of learning is rich, deep and cannot be adequately discussed in this chapter. However, an introduction to experiential learning provides a basis for understanding how
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