

# Tips for Writing Lessons Learned Documents

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# Why Document Lessons Learned?

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- ◆ Transfer what was learned at one facility or operation to another facility
- ◆ Prevent recurrence and improve operations
- ◆ Capture information for use in work planning, new project planning, daily safety reminders, future initiatives
- ◆ Provide feedback and support continuous improvement initiatives
  - Key element of Integrated Safety Management Systems
- ◆ It's the **right** thing to do

# Identifying Lessons Learned

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## ◆ Examples of sources of Lessons Learned:

- ✉ Daily activities
- ✉ Occurrence and incident reports
- ✉ Assessment activities
- ✉ Employee concerns
- ✉ Injury and illness reports
- ✉ Operational Readiness Reviews
- ✉ Management Reviews
- ✉ PAAA noncompliances
- ✉ Technical periodicals
- ✉ Project completion evaluations
- ✉ Performance/process improvement initiatives

# Screening for Lessons Learned

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- ◆ Sources of Lessons Learned information should be reviewed and screened for potential applicability
- ◆ Different approaches for review/screening
  - Multi-disciplinary team approach
  - Specific designated individual
  - Everyone does it themselves
- ◆ Review for trends
  - Over time
  - Across organizations and facilities

# Preparing a Lessons Learned Document

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- ◆ Initial considerations:
  - Who is the audience?
  - Is this important?
  - How will the information be used?
  - Is the information preliminary or conclusive
  - Can the information be validated for factual accuracy?
  - Do I want the reader to take any specific actions?
- ◆ Consider both immediate use of the Lesson Learned information **and** long-term use as a historical document
- ◆ Avoid information “overload”

# Tips for Writing a Lesson Learned Document

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## ◆ General Tips:

- Use the reader's language
  - Don't use technical language if not necessary;
  - Don't use slang inappropriate for written documents;
  - Don't assume your reader knows all your shortcuts and acronyms.
- Write in conversational language using active verbs.
- Avoid long or cumbersome sentences.
- Ensure objects and pronouns are clear.

# Title of the Lesson Learned

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- ◆ The Title and Lessons Learned Statement must get the reader's attention.
  - Make it short . . . but tell the whole story;
  - Make the reader sense that this is something they **need** and **want** to know.
- ◆ Title:
  - Be specific to the incident or the situation, avoid using generic phrases;
  - Usually the Title is what is displayed when referencing the lesson learned document.

# Lesson Learned Statement

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## ◆ Lesson Learned Statement:

- Brief, to the point statement about what was learned;
- Is the primary theme for the remainder of the lesson learned document;
- Don't limit the statement too narrowly;
- Can the lesson apply to other types of job functions?
- Can the lesson apply to other organizations?
- Can the same situation occur in a different environment?

## ◆ Example:

- (a) The possibility for injury to administrative workers from electrical hazards is a real risk, even though most electrical safety information developed and published by DOE emphasizes the electrical hazards encountered by technical and maintenance workers. **or** Electrical plugs which are not fully engaged in an outlet may result in electrical hazards.
- (b) Employee slips and breaks foot **or** Facility Modifications Can Result in Unanticipated Design Problems

# Lesson Learned Discussion and Analysis

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- ◆ Discussion: Brief description of facts which resulted in the initiation of the lesson learned
  - Be selective, don't overwhelm the reader;
  - Stick to the **pertinent** facts;
  - Provides sources for additional information in the *References*;
  - Use caution when citing vendor names;
  - Don't reiterate all of the details in the event report;
  - Include dates and locations only if applicable to the lesson learned.
- ◆ Analysis: Summarizes the results of any analysis that was performed
  - Avoid judgmental statements;
  - Provide only actual facts;
  - Use results from the causal analysis, critique, or investigation;
  - Provide specific causes, if known.

# Recommended Actions

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- ◆ Directed towards specific actions taken, planned, or recommended as related to the lesson learned;
- ◆ Make specific action oriented recommendations;
- ◆ Avoid vague, sweeping statements;
- ◆ Consider the need for preventive actions to prevent a negative situation from recurring; look broader than the specific incident;
- ◆ Identify improvement actions to encourage implementation of good practices.

# Additional Considerations When Writing a Lesson Learned Document

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- ◆ Keywords: key concepts or phrases related to the lesson learned
  - Used with text searching capabilities.
- ◆ Are there any citations to regulations or Orders which can be used to emphasize the lesson learned? If so, include in the References section.
- ◆ Avoid the use of personal names or manufacturer/vendor names.
- ◆ If the information is preliminary – tell the reader
  - Provide additional updates and information when available.
- ◆ Verify the sensitivity of the information;
  - Classification reviews;
  - Vendor liabilities, ownership, copyright issues.
- ◆ Are there any similar events which have recently occurred that would indicate a potential trend?
- ◆ Review for consistency in the primary elements of the lesson learned document
  - Do each of the elements of the lesson tell the same story?

# Review and Validation of Lessons Learned Documents

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- ◆ Subject Matter Expert review
  - Factual accuracy of the information
  - Determination of the priority descriptor
  - Determination of the applicability and the need for required actions
  - Recommended audience, dissemination approaches

# Summary

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- ◆ Does the information effectively communicate the message?
- ◆ Will the information be value-added?
- ◆ Is the information technically accurate and have all necessary approvals been obtained?
- ◆ Can the information be used today – and in the future?