



**Managing  
Lessons Learned  
in a  
Healthcare Environment**

# Performance Against Goals

- **Goal:** state original goal or goals of project
  - List key metrics
- **Actual:** summarize what really happened in relationship to goals
  - List progress against metrics

# Hurricane Katrina—New Orleans

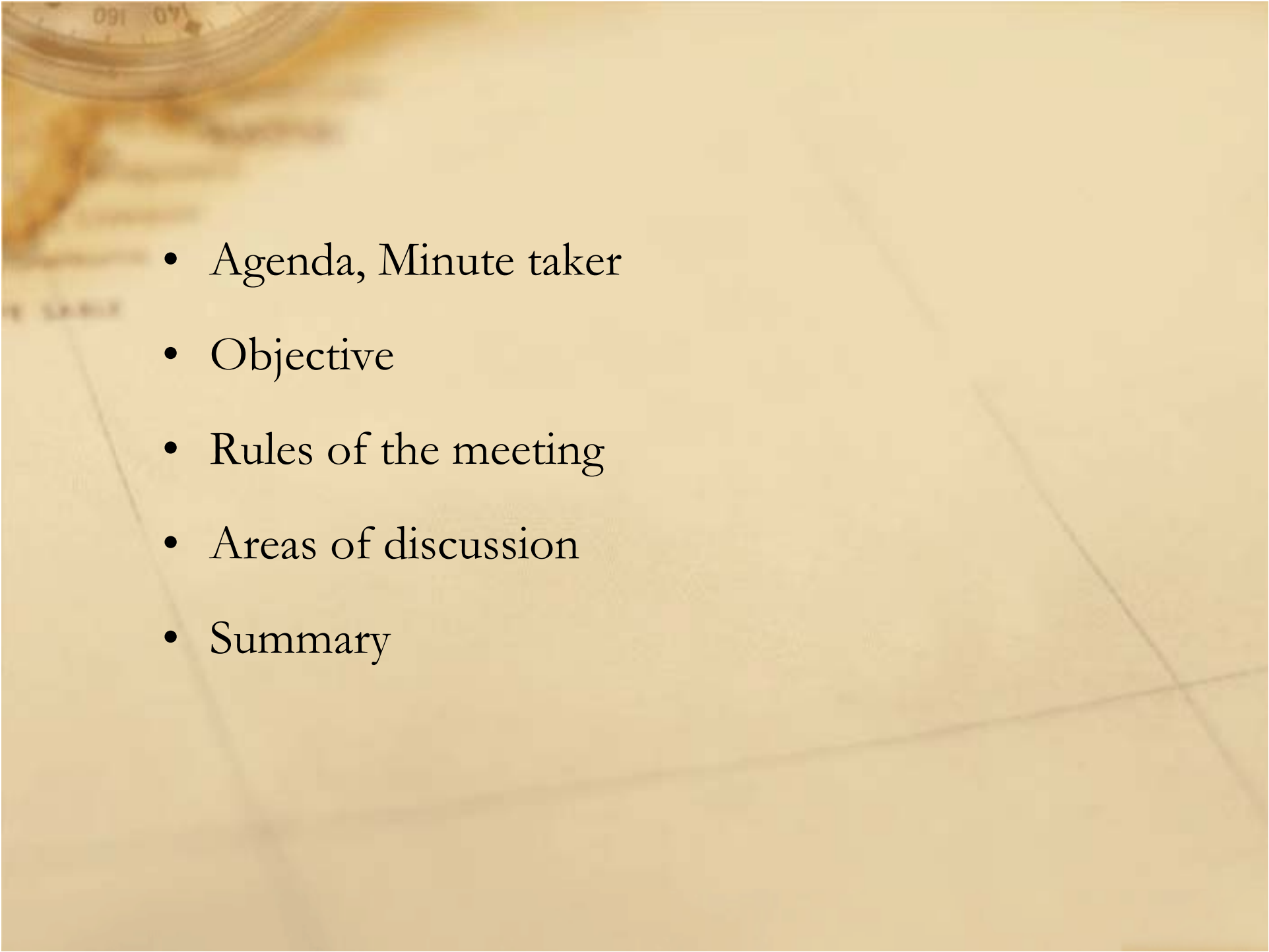
- We have all seen the devastation in New Orleans. My home state of Louisiana.
- It is all so unbelievable. But even as I see the mess there, I can't help...as a Project Manager...to think about what could have been.
- Were there any project managers involved in the disaster planning (locally and nationally)?
- If so, did they use standard PM methodology?

# Lessons Learned after disaster

- Considering all the issues we have already seen;...and some things we will never see or hear about...there is definitely the need for a "Lessons Learned".
- To both look at what went right and what went wrong.



**What should a Lessons Learned  
discussion consist of?**

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- Agenda, Minute taker
  - Objective
  - Rules of the meeting
  - Areas of discussion
  - Summary



# **Lessons Learned By Area**

# Objective

- Identify what was done well, so you can repeat it in future projects.
- Identify opportunities for improvement (what was not done well and solutions for improvement).
- How to apply what we learned on future projects? Or include risks, if problems are not something you can control.

# Meeting Rules

- Avoid finger pointing.
- Remove emotions from issues. Remain focused on improvement.
- Do not interrupt when issues are being presented.
- Speak freely, but professionally.
- Do not speak in general terms - be specific.
- Each issue should have a proposed solution. Think it through; brainstorm ideas.

# Discussion Categories

- General Project Impressions—Was the result positive, regardless of how you got there?
- Project Definitions/Objectives—What were they? Were they realized? If not, why not?
- Project Deliverables--Did you deliver what you promised you would deliver?
- Project Management (project control/process) Were issues dealt with promptly?
- Project Involvement (timely involvement of resources)



# Key Lessons

# What Went Right

- Summarize in quick bullet points specific things that worked well
  - Use specific examples: “bi-monthly status meetings, daily briefings worked well” rather than “team communicated well.”
  - Distribute or list network location of forms, procedures, reports, etc. that were found to be particularly useful.

# What Went Wrong

- Summarize in quick bullet points specific things that caused problems
  - Try to isolate specific attitudes, procedures, methods, timing issues, risks, etc. which caused problems
- How did team respond to problems?

# Recommendations

- By department or management level, record critical recommendations for future projects of this type
- Distribute document or network location of more detailed summary of the Lessons Learned meeting



# Questions & Comments