

Encouraging Participation in the Lessons Learned Process

Best Practices from Credit Suisse

Financial services company Credit Suisse was among three best-practice organizations studied as part of APQC's 2009 Collaborative Research study, *Cutting the Cost of Not Knowing: Lessons Learned Systems People Really Use*. Credit Suisse encourages participation in the lessons learned process in three broad ways:

- educating employees on the lessons learned process,
- providing employees with opportunities for self-education, and
- making lessons learned participation worthwhile.

EDUCATING EMPLOYEES ON THE LESSONS LEARNED PROCESS

To ensure that employees understand the lessons learned process and why they should participate, it is important to communicate through multiple channels. Credit Suisse promotes awareness of its lessons learned capture and reuse activities through:

educational content provided to project and quality management personnel,

organizational town halls,

the IT staff magazine, and

a one-page fact sheet.

To provide a more comprehensive view of the process, formal lessons learned training is provided to the following groups:

new employees during on-boarding,

individuals who participate in solution delivery process training,

moderators (individuals who are responsible for facilitating lessons learned capture sessions), and

management (on an ad-hoc basis).

PROVIDING EMPLOYEES WITH OPPORTUNITIES FOR SELF-EDUCATION

In addition to formal training, employees can educate themselves about lessons learned at any time by accessing the My Resources area of Credit Suisse's lesson learned repository, which provides detailed information about the process and the roles involved. Templates, guidelines, and forms are categorized according to the specific role to which they pertain, such as session moderator or contributor, and lists of frequently asked questions are available to help employees who are new to lessons learned.

Figure 1 depicts an example My Resources page.

Sample My Resources Page

MyResources	
All MyResources about Lessons Learned from one place! Find presentations, frequently asked questions, process information and other support material for Lessons Learned	
New Item Filter Edit in Datasheet	
Title	Resource Category
Main Role : Moderator (2)	
Template for Identifying Learnings in a Capture Lessons Learned Session	1. Templates
Moderator Guideline	2. Guidelines
Main Role : Project Manager (11)	
Request Capture Lessons Learned Session	1. Templates
Lessons Learned Report Template (EN and DE) for Capture Lessons Learned process	1. Templates
Guideline for Capturing Lessons Learned for Capture Lessons Learned process	2. Guidelines
Guideline for Reuse Lessons Learned for Reuse Lessons Learned process	2. Guidelines
Lessons Learned Approach: One Pager	3. Roles and Processes
Capture Lessons Learned Process	3. Roles and Processes
Reuse Lessons Learned Process	3. Roles and Processes
Lessons Learned Process for Non-Compliances (NC): Standard Steps (EN and DE) and Process Overview	3. Roles and Processes
Lessons Learned for Newbies - 2007 Edition	4. Communication and Advertising
KM Services Update: PM Brush-Up Topic in February 2009	4. Communication and Advertising
FAQs: Frequently Asked Questions	5. FAQs
Main Role : Quality Organization Member (3)	
Organizational Lessons Learned Evaluation: Summary and Lessons Learned Report H1 (January – May) 2007	4. Communication and Advertising
Organizational Lessons Learned Evaluation: Summary and Lessons Learned Report H2 (June – December) 2007	4. Communication and Advertising
Organizational Lessons Learned Evaluation: Summary and Lessons Learned Report H4 (January – May) 2007	4. Communication and Advertising

Figure 1

MAKING PARTICIPATION WORTHWHILE

Participation in Credit Suisse's lessons learned process is not mandatory, but the organization tries to encourage involvement by making the experience as positive as possible. Lessons learned capture and reuse activities are designed to be efficient and effective, and surveys are conducted to assess employee attitudes toward the process and outcomes. The belief is that, if employees are satisfied with the process, they will be more likely to participate in the future, promote the service to others, and provide feedback on positive aspects of the process and improvement opportunities.

According to Heather Schüpbach, Credit Suisse's lessons learned process leader, there will always be cultural barriers to the capture of lessons learned. Convincing employees share their knowledge, instead of hoarding it in an effort to make themselves more indispensable, is an ongoing challenge. Moreover, the process must address generational gaps and accommodate employees with different tenures (i.e., new hires vs. seasoned employees). Often, cultural change comes down to the efforts of individuals—both lessons learned capture session moderators, who use their charisma to promote the process and make it enjoyable, and session participants, who benefit from lessons learned and communicate their experiences to others.

ABOUT APQC

For over 30 years, APQC has been on the leading edge of improving performance and fostering innovation around the world. APQC works with organizations across all industries to find practical, cost-effective solutions to drive productivity and quality improvement. We are a member-based nonprofit currently serving more than 500 organizations in all sectors of business, education, and government.

CONTACT INFORMATION

123 North Post Oak Lane, Third Floor
Houston, TX 77024-7797
phone: +1-713-681-4020 or 800-776-9676
fax: +1-713-681-8578
e-mail: apqcinfo@apqc.org
www.apqc.org