Measuring the Lessons Learned Process and Its Outcomes

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*.

According to Credit Suisse, when implementing a lessons learned process, it is of paramount importance to measure the amount of lessons learned activity and the value derived from reuse. Once an organization can demonstrate tangible benefits from lessons learned, it is much easier to gain buy-in from leadership and employees.

Because measurement is one of the five phases of Credit Suisse's Operational Excellence methodology, which guided the development of the lessons learned process, a robust set of measures was put in place before the process was even implemented. Today, the organization relies primarily on four measures to track the performance of its lessons learned process:

1. number of active requests for lessons learned capture sessions,
2. duration of and effort involved in the lessons learned capture process,
3. client (i.e., participant) satisfaction, and
4. reuse of lessons learned.

Credit Suisse's knowledge management (KM) competence center is responsible for the lessons learned process, including the collection and analysis of appropriate measures.

MEASURING THE PROCESS

Performance measures for lessons learned capture activities are collected via a standard process performance worksheet that moderators complete at the conclusion of each capture session. Data indicates that, on average, moderators collect three lessons per session.

According to client satisfaction data, which is obtained via a survey, the majority of employees who participate in capture sessions believe that lessons learned capture activities are moderately simple and effective and that they create value with minimal investment (Figure 1).Moreover, survey results indicate that employees consider the capture process extremely efficient. Many respondents indicate that they look forward to sharing lessons learned with others. The fact that employees see the process as effective and efficient is critical to the growth and sustainability of the lessons learned initiative.

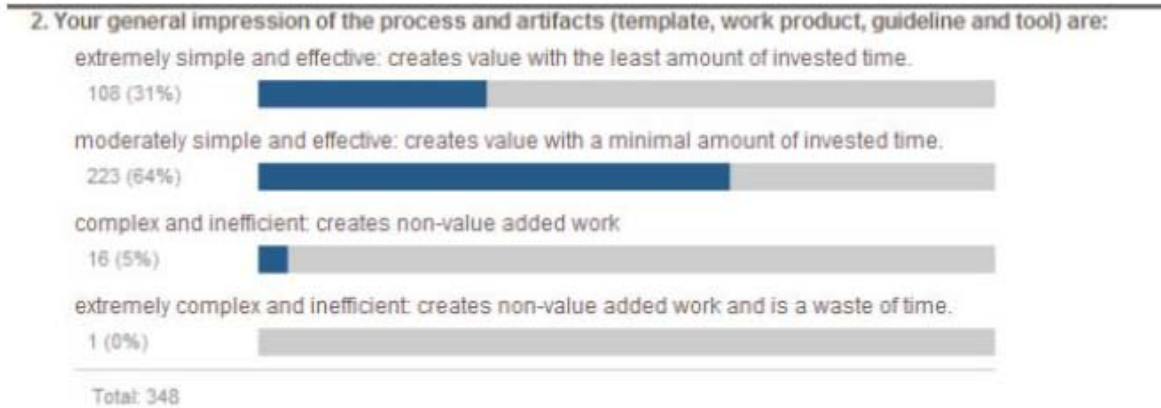## Satisfaction with the Lessons Learned Capture Process

2. Your general impression of the process and artifacts (template, work product, guideline and tool) are:

extremely simple and effective: creates value with the least amount of invested time.

108 (31%)

moderately simple and effective: creates value with a minimal amount of invested time.

223 (64%)

complex and inefficient: creates non-value added work

16 (5%)

extremely complex and inefficient: creates non-value added work and is a waste of time.

1 (0%)

Total: 348

Figure 1

MEASURING REUSE

A separate survey is used to evaluate how lessons learned are being reused. Data collected in 2008 indicates that reuse decreased slightly (by 3 percent) in comparison to the previous year. However, the number of person days saved through reuse increased by one person day. On average, for each project, one can expect to save three person days as a result of lessons learned reuse, where one person day equals eight hours of labor. Even on projects where no labor was saved, the majority of respondents agree that quality was improved through the application of lessons learned.

Figures 2 and 3 show actual results from Credit Suisse's 2008 survey on the reuse of lessons learned. Figure 2 shows the number of survey respondents who selected each answer, and Figure 3 shows the popularity of each answer as a percentage of total responses.

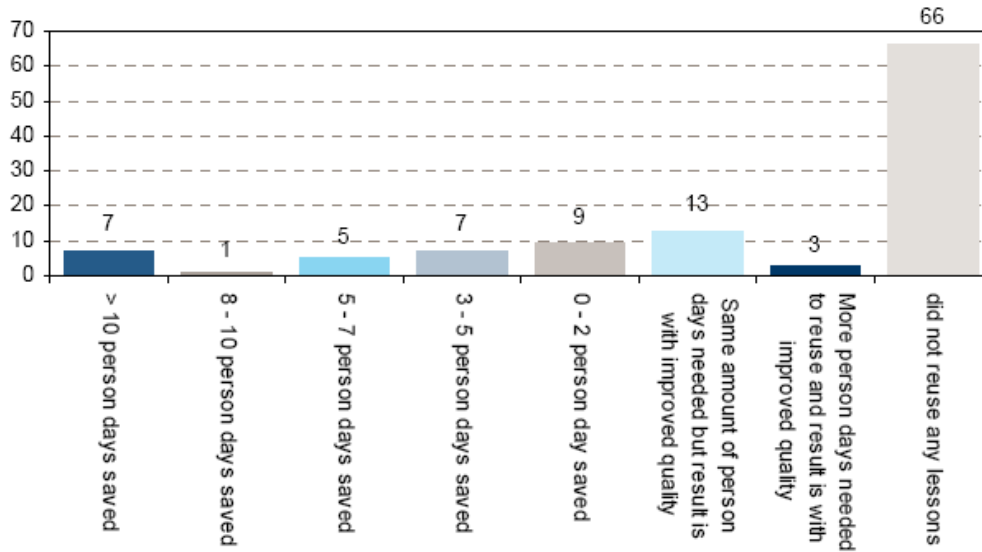## Person Days Saved by Reusing Lessons Learning 2008

Figure 2

Person Days Saved by Reusing Lessons Learned in 2008: Percentages

Figure 3

APQC

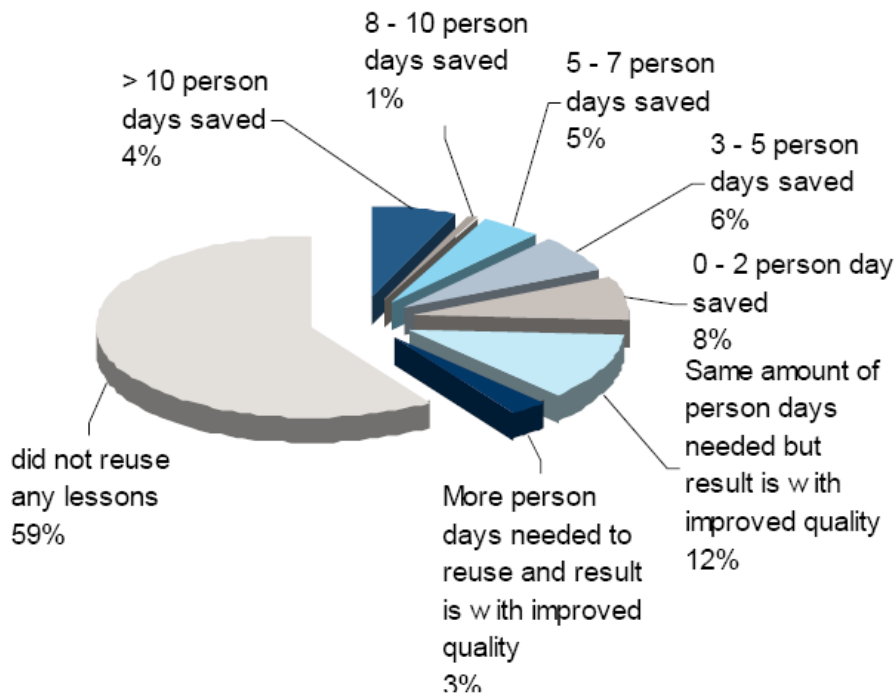## FUTURE PLANS

Moving forward, the KM competence center would like to implement enhanced feedback mechanisms to evaluate the lessons learned process. One plan involves adding rating functionality to the lessons learned repository so that employees can evaluate and comment on the usefulness of each lesson. In addition to helping employees find the most useful lessons, this type of feedback will enable the KM competence center to better gauge employees' ongoing satisfaction with the repository and its contents while uncovering and addressing specific problems, such as a particular project team or moderator whose lessons score poorly in terms of usefulness.

A second plan involves determining which projects are best suited for lessons learned capture. Participation in the lessons learned process is not mandatory, and the organization does not intend to start forcing certain projects to collect lessons learned, but the evaluations may help identify which projects are most likely to generate lessons that could be reused by others. As reuse usability ratings begin to be collected, Credit Suisse hopes to undertake a thorough evaluation of the data and initiate appropriate improvements.

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.

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