



How Do We Apply and Share “Lessons Learned”?

David L. Caruso, NIOSH

Overview and Scope

1. What is a lesson learned?
2. How do we apply them?
3. How do we share?
4. Case studies and examples



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the learning gained from the process of performing the project

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From the Project Management Institute (PMI)
Project Management Body of Knowledge (PMBOK)

What is the purpose of Lessons Learned?

1. Promote the recurrence of desirable outcomes
2. Preclude the recurrence of undesirable outcomes



Like any process, if you miss a step...

1. Identification – What happened?
2. Documentation – Was it good or bad?
3. Validation – Do we want it to happen or not happen again?
4. Dissemination – Share/Repeat



Did you know people do this for a living?

- **11,261** results for **lessons learned** on LinkedIn within the oil and energy industry.
- To promote knowledge sharing and **lessons learned** across the whole business... -- *Sr. H&S Leader, Jacobs. LinkedIn 11/16/2016*



Ask yourself:

Why is this concept so popular?

Does it work?

Does it need a new name?



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**Your past is where you learned the lesson.
Now is when you get to apply it.**

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— Karen Salmansohn

We are all historians...

Current and future generations capture and share everything.
Peer validation is more valuable than hierarchical/institutional.



Application – Step 1: Document

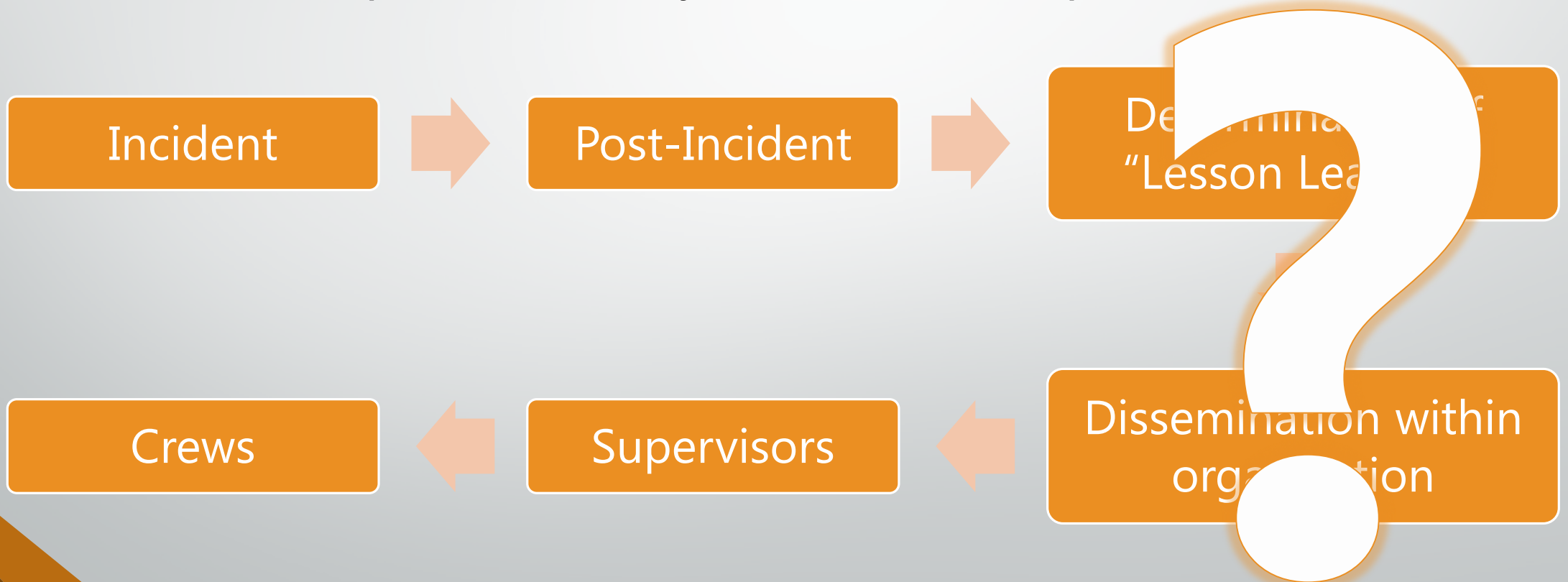
Write it down.

1. What happened?
2. Was it a lesson? What is there to be learned?
3. How is it generalizable?
4. How will we/others use it?
5. What will we measure/track as a metric of improvement?

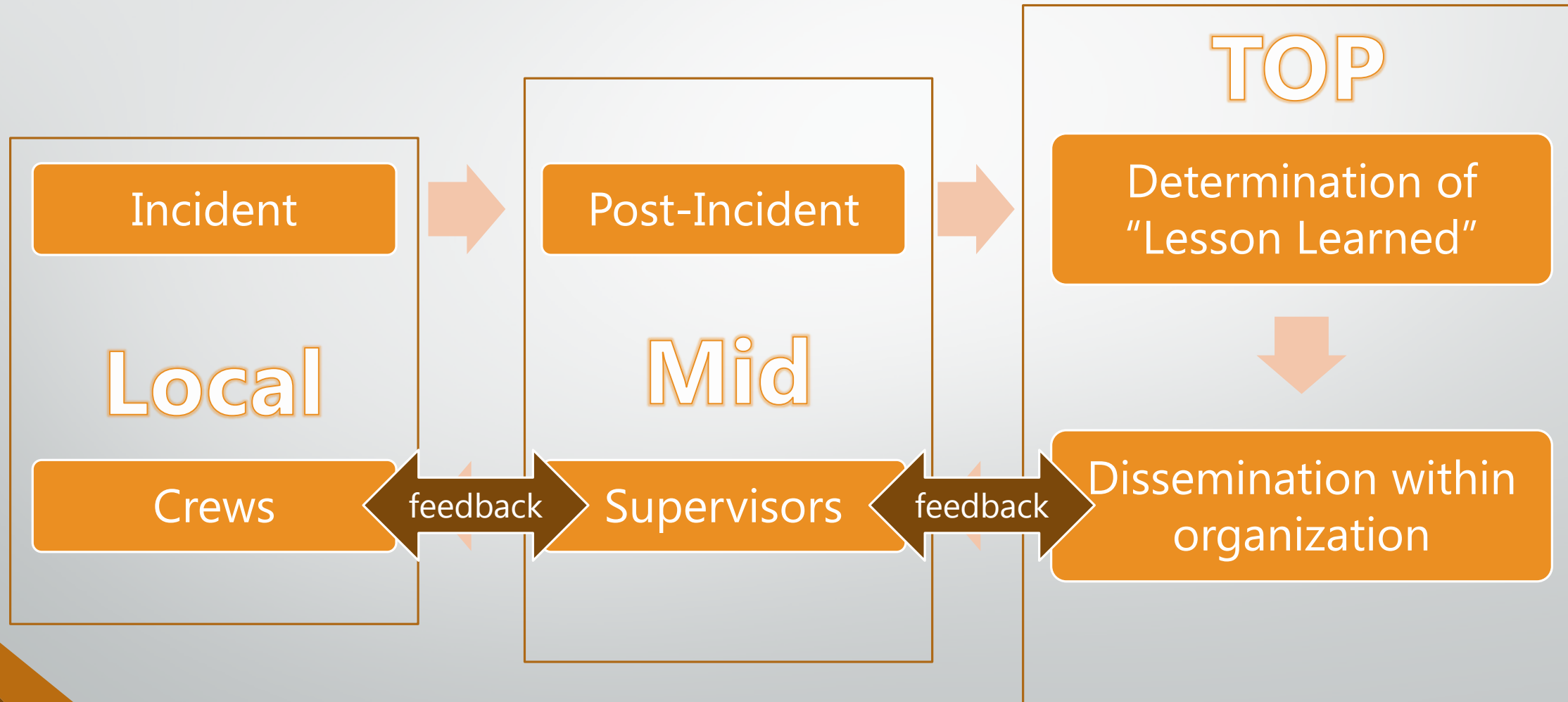


Application – Step 2: Implement

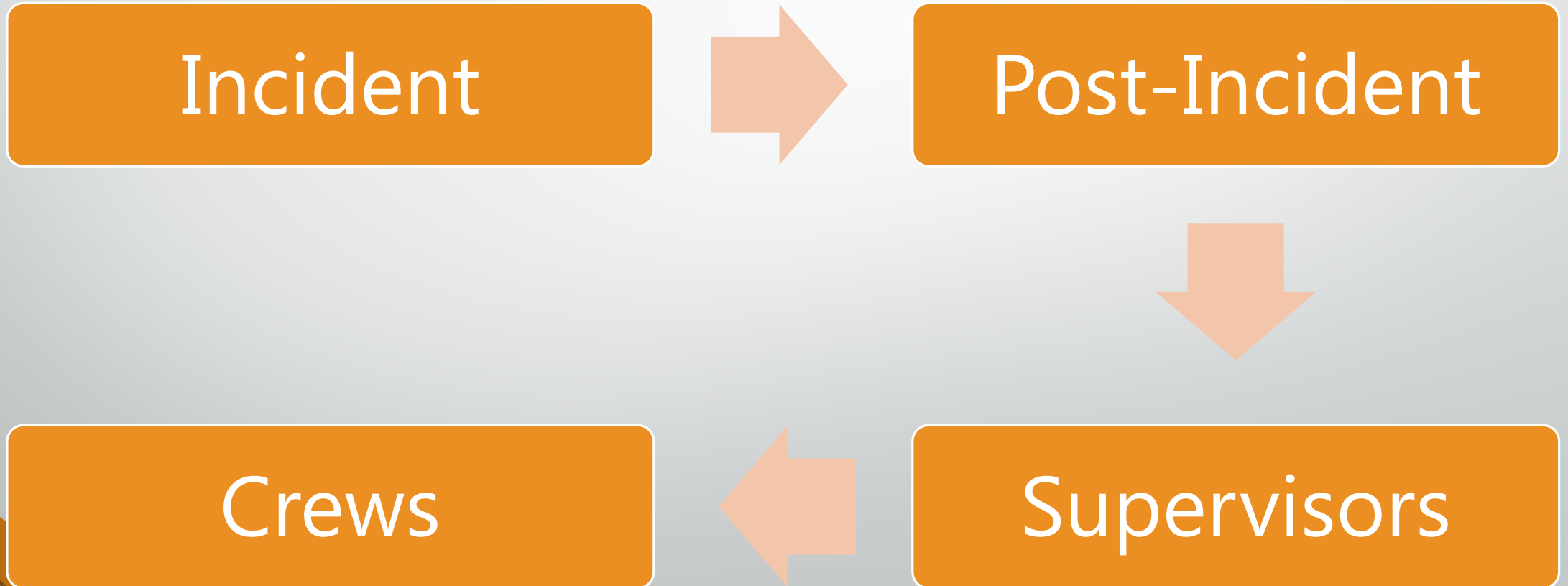
Like the shampoo bottle says, "Rinse and repeat"



Application – Step 3: Improve



Application – Step 2: Implement





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Docendo discimus
by teaching, we learn

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— Latin proverb attributed to Seneca the Younger

Share - Internal

- Start at the source – the crew involved in the incident and their supervisors
- Next level – all crews managed by the same supervisors
- All supervisors and crews in that business unit or division
- Company-wide (global, if possible, with mods)



Share - External

- STEPS meeting - get on the agenda and tell your story
- Gather feedback from those in the room – could they use the information you shared?
- National/Global
 - OSHA Conf.
 - Social Media
 - Article for Well Servicing or blog



Share – Social Media

SlideShare –
presentations online
Search keyword or #



LinkedIn – groups for
discussion and
sharing



Tell a story

1. **Journey** – Where does the story start and end?
2. **Players** – Who is involved in the story?
3. **Surprises** – What barriers/obstacles must be overcome?
What are the turning points?
4. **Victory** – What happens that triggers the adoption of behavior?
What made the most difference?
5. **Emotion** – How is emotion developed?
6. **Message** – What's the moral of the story?



Why stories work:

Make a connection

Trigger memory

Touch on a non-HSE benefit





Video break!

No Seat Belt – No Excuse



Embrace Life – Always Wear Your Seat Belt



Case Studies

- Tank Gauging
- Hot work
- Fall Prevention
- Other industries:
 - Mining – Arc Flash
 - Flood/Disaster Recovery – Chainsaw and generator misuse



Audience Participation

- What resonated with you from this session?
- What lessons do you know you learned but haven't applied and shared? Why not?
- Do you know a great storyteller? Meet one here at the conference...Warren Hubler, Rick Ingram...



Contact information

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Thank you

How Do We Apply and Share “Lessons Learned”?

David Caruso - NIOSH

Wednesday 2:00 PM–2:45 PM 346 AB

This session explores why many “lessons learned” do not become “lessons applied” in the workplace. How do you gather good stories and meaningful content to drive home safety and health messages?

We will map communication pathways and discuss the potential for a best practice in capturing, cataloging and integrating these relevant lessons into your HSE routine.

