



AIA Best Practices: Lessons learned: A potent knowledge-building tool

Excerpted and adapted from Architect's Essentials of Professional Development by Jean R. Valence, Hon. AIA

Summary

Lessons-learned programs can become an essential element of a firm's knowledge-sharing process. The benefits of such a program, tips for organizing it, and details concerning the program of one firm—Reynolds, Smith and Hills Inc.—are highlighted.

Benefits of a lessons-learned program

Lessons-learned is simply the deliberate act of building knowledge during the accomplishment of projects, under the watchful eye of the project manager. Professionals always learn tacitly through their work; lessons-learned replaces tacit, individual learning with articulated, shared learning that extends throughout the team and sometimes beyond.

A lessons-learned program benefits the firm in many ways, by:

- intensifying quality awareness during project delivery
- providing immediate opportunity to improve client satisfaction
- serving as a proving ground for concepts introduced in a curriculum
- directly relating learning to practice
- inviting coaches to be role models for knowledge building
- regularly channeling fresh client and market research into the firm
- capturing and extending senior staff know-how
- building team attitude
- stimulating trust and delegation
- enhancing communication
- weaving learning into a billable activity

Lessons-learned has advantages over other methods. It is more easily implemented than an in-house university and more widely accessible than mentoring. Lessons-learned generates within each project a vortex of information and ideas from the firm's past experience and from its current team members, clients, and consultants. Once synthesized, this knowledge becomes part of the firm's institutional wisdom to be applied to future projects and to advance the firm's long-range vision.

Organizing a project for learning

Begin the lessons-learned process by establishing learning objectives at the firm's in-house project kickoff. Some of the goals may be shared with the larger team, even clients. Learning objectives should be clearly stated—for example, "At the end of this program, team members will understand . . ." or "will be able to . . .".

With objectives in place, the team leader assigns each one, or some aspect of it, to team members for consideration as they work on the project.

At project milestones, team members share their observations to date and seek input from their colleagues. The feedback is used to refine their charges for review at the next project milestone as well as to bolster product and service quality. Team members also discuss things they are learning and need to investigate further, beyond the initial objectives.

At the conclusion of the project, a final lessons-learned session describes the results of all the learning objectives and identifies the unanticipated knowledge that accrued to the team in the course of the project.

Whether or not other members of the firm are invited to the final session, a record of key information becomes part of the firm's knowledge base, readily available and easily accessed. Topics for further investigation can be addressed through other project teams or special research efforts.

A sample lessons-learned program

At [Reynolds, Smith and Hills \(RS&H\)](#) in Jacksonville, Fla., lessons-learned is a popular process in the A/E firm's Commercial Group, which encompasses approximately 50 people within the office. The firm has adapted the process to suit its needs, and the process is not ironclad, but typically the group director and office director select a project. At least half the group members must have been involved in the project for it to be eligible for a lessons-learned session.

Lessons-learned is conducted after the final project closeout, and only members of the firm may attend the mandatory three-hour session, which is scheduled from 4 to 7 p.m. Pizza is served, and time is charged to overhead. The project manager leads the process and sets the agenda, drawing on outlines of past sessions for ideas.

Data about the project and team are compiled and presented, including the project's location, size, cost, delivery method, fee, number of drawings, services provided, and schedule as well as the identity of the team members, client, user, developer, consultants, general contractor, subs, and the like. Notes taken during the session are distributed to team members, archived, and made available to other project managers.

An agenda for an RS&H lessons-learned session generally covers at least seven topics:

- **Marketing history.** How did the project come into the office?

- **Proposal.** What did we promise (e.g., services, scope, budget, fee, schedule) and why? How did we perform on each promise?
- **Project delivery.** What was the delivery method? For example, were we to prepare full bid documents in a traditional process, permit documents for a developer, or design-build documents for a contractor?
- **Design.** How did the design evolve? What were the “givens”? The parameters? The client’s preconceived notions? What was the impact of value engineering?
- **Documents.** What was learned about documentation? For example, was the level of detail different than anticipated? What does each discipline have to say about its own documentation effort?
- **Construction administration.** What was learned?
- **Final close-out.** What was learned?

As a communications tool, lessons-learned contributes both to the people who participate in the process and to the firm at large.

About the contributor

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About AIA Best Practices

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