

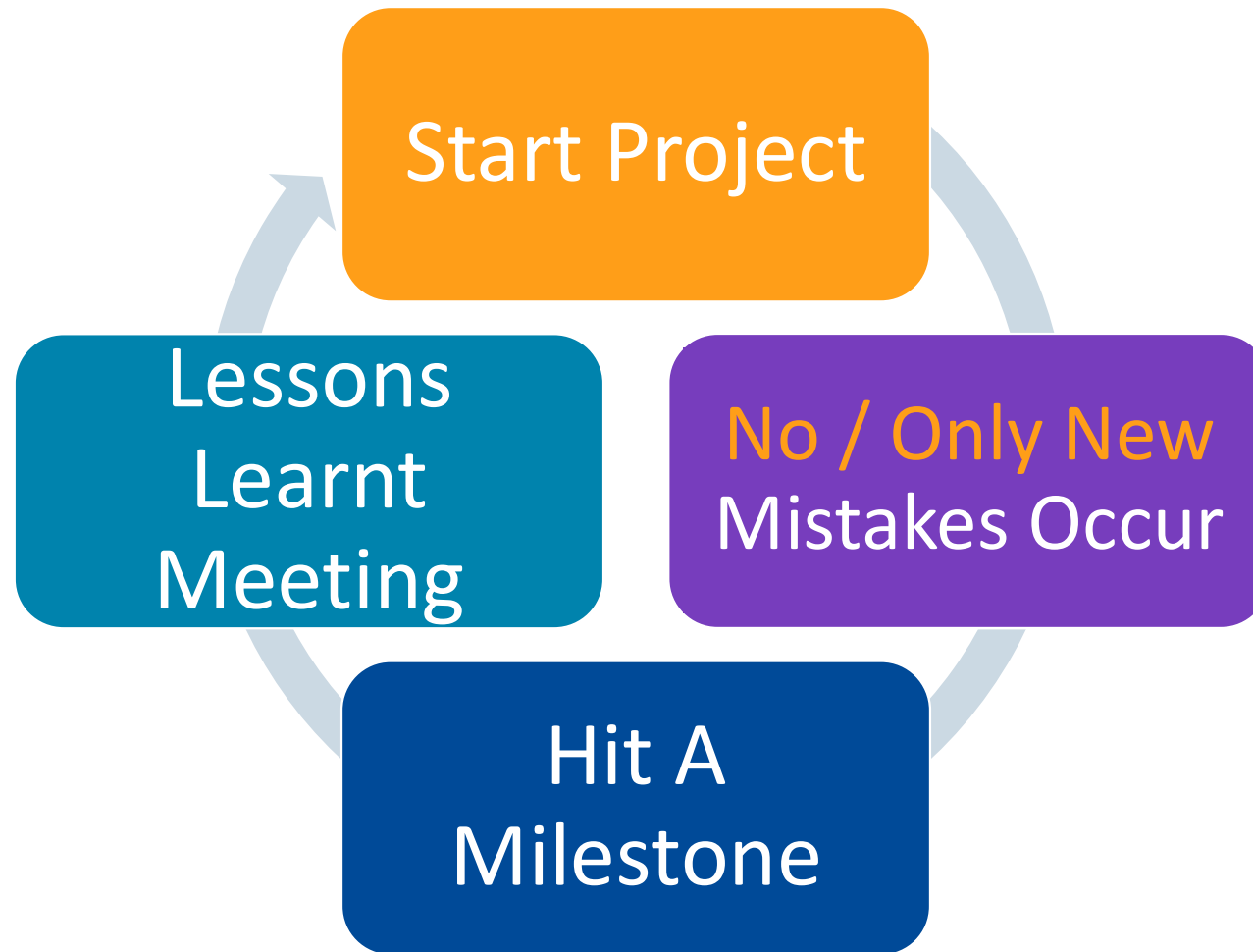


Learning Lessons

How to Run a Useful Lessons Learned Meeting and Track Actions

Sam Ruddell, PSI Conference 19 June 2024

A familiar cycle?



Why run a
lessons learnt
meeting?



Reflect

Revise

Refine

What makes the meeting useful?

How to run an effective meeting?

Preparation: Scheduling

Regular
Meetings



Multiple
Deliverables



Allow
Preparation



Preparation: Template slides

Study xyz-123

Lesson	Action
Lesson 1 text	Action 1
Lesson 2 text	Action 2
Lesson 3 text	Action 3

Conducting

The Golden Rules

1. No blame
2. Celebrate success
3. Moderate the discussion
4. Open questions
5. Bring quieter team members into discussion

What Next?

What next?

1. Communicate findings

What happened?

Why did it happen?

What actions to take

What next?

2. Record and track lessons

Lesson ID	Sponsor	Project Code	Lesson text	Category	Actions	Action Owner	Action Status
2024-02-001	Big Pharma	CR_Code1	Some ambiguity in protocol was also reflected in SAP leading to different interpretations	SAP	Update SAP creation checklist to ensure a call is held discussing all approaches – especially if author feels protocol has ambiguity	SARUD	Completed
2024-02-002	BioTech xyz	BS_Code2	The overall scope of work was larger than in contract, but this was not raised until too late	Budget	1) Train existing team on study budget, develop new training for all new leads. 2) Add reconciliation against contract to regular project review meetings	1) MAHUM 2) TOCOR	1) Ongoing 2) Completed

What next?

3. Revisit

- Periodic check ins
- Have lessons been learned?
- Identify Repeated lessons



What next?

Anticipating a question:

Who has the time to do this?

Conclusion

- Why?
 - Reflect, revise, refine
- How?
 - Reduce the burden for the team
 - Ensure good meeting etiquette – no blame
 - Ensure all voices are heard
- What next?
 - Track Lessons
 - Assign actions
 - Revisit – are lessons being learned?



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