



## Lessons Learned Strategy

December 2025

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## Document Information

<b>Title</b>	<i>Lessons Learned Strategy</i>
<b>Product Number</b>	<i>IAMF 012</i>
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<b>Description</b>	<i>Strategy considers aspects of the service, project or process that has presented delivery concerns, what has caused the concern and how it may be addressed and rectified.</i>

## Document History

<i>Version No.</i>	<i>Status</i>	<i>Author</i>	<i>Date</i>	<i>Changes from Previous Version</i>	<i>Checked and Approved</i>	<i>Date</i>
<i>01</i>	<i>Draft</i>	<i>SM/JW</i>	<i>Aug 23</i>			
<i>1.01</i>	<i>Final</i>	<i>SM/JW</i>	<i>Dec 23</i>	<i>Cabinet</i>	<i>PG</i>	<i>Dec 23</i>
<i>2.01</i>	<i>Final</i>	<i>SP</i>	<i>Dec 24</i>	<i>1<sup>st</sup> Yearly review</i>	<i>PG/AR</i>	<i>Dec 24</i>
<i>3.01</i>	<i>Final</i>	<i>BF</i>	<i>Nov 25</i>	<i>Annual Review</i>	<i>SP/PG</i>	<i>Dec 25</i>

## 1. Introduction

This strategy sets out to define a process whereby significant operational events, projects, processes and procedures which adversely impact on the Authority's ability to deliver a service are identified and reviewed so as to communicate the risks, determine effective solutions and embody learning from our actions as an integral part of daily work. It may also consider some of the smaller lessons learned that tend to be reported, addressed and resolved through in-house team meetings but which may have some significance and benefits for inclusion to a wider audience.

Various aspects or categories of service delivery may be considered as follows:

- Projects - Risk/Scope/Delivery/Resources
- Management
- Administration
- Financial
- Operational

These entities can give rise to delivery challenges which may be defined, reviewed and hopefully mitigated through a consideration of various actions and interventions.

The event may also give rise to positive lessons learned and outcomes which provides an invaluable tool through which other projects and activities may benefit from.

The aim of this strategy is to consider what aspects of the service, project or process has presented a delivery problem, what has caused the problem and how it may be addressed and rectified. The strategy is also used to explore those aspects of the service or project that have provided positive outcomes and how these experiences may be applied to other future service delivery operations.

Infrastructure asset maintenance management is a wide ranging and complex discipline which faces many challenges and is fraught with demanding hurdles. Whilst many projects will be successfully delivered with minimal difficulties, within budget and to time, there will however be a minority of projects and services that present delivery challenges for various reasons, it is these activities that require a review of their

delivery protocols with a consideration of how the issues may be addressed and mitigation measures implemented. By undertaking this review, we are well placed to realise and appreciate the operational deficiencies associated with key aspects of service, project and process delivery and to try and secure a corrective position within the limitations of financial constraints and resource availability.

## 2. Lessons Learned Register

The events giving rise to delivery concerns may be logged in a Lessons Learned Register listing those projects, activities and services which are of interest.

The review may comprise of various components relating to the management, administration, design, specification, operational and financial aspects of the project, process or service which present delivery risks and mitigation challenges. It also provides an opportunity to communicate the problems and solutions so that they can be considered across other projects and services, so that similar problems can be addressed.

For each event or lessons learned listed, the following information may be defined and recorded:

- **Category** - defines the type of challenge experienced, e.g., risk, scope, resource, delivery
- **Event** – logs the particular event or activity to be reviewed
- **Contributing Factors or Causes** – provides a description of the challenge or difficulty that requires to be addressed
- **Lesson Category** – a positive or negative indicator of the factor or cause under consideration
- **Early Warning** – whether or not the problem was anticipated or known about prior to the implementation of the project/activity
- **Time** - an indicator that the project or programme has time implications and therefore delivery consequences

- **Financial** - an indicator that the project or programme has cost implications and consequences
- **HR Implications**- an indicator that the project or programme is subject to staffing resource constraints
- **Procurement** - an indicator that the project or programme has procurement implications which may have an impact on delivery, costs and timings
- **Solutions** – where a solution has been determined this should be included as part of the potential actions following a review
- **Mitigation** – agreed mitigation measures
- **Communication** – communication / circulation list
- **Review** – agreed review period

Having identified and registered the problem, the register incorporates mitigation options with recommendations, as well as a set time for review to ensure the recommended mitigation/solution delivers the expected outcomes and benefits of the actions taken once they have been implemented.

The following additional project management and operational works pressures and impacts may also contribute to service delivery limitations and lessons learned deliberations and may be incorporated as specific events for inclusion in the lessons learned register:

- Health and Safety Legislation
- Highways Legislation, Environmental and Biodiversity
- Operational Working Practices
- Stakeholder Expectations
- Traffic Management
- Service Delivery, Programming and Coordination
- Seasonal Constraints and Weather Delays

If documented and disseminated properly the lessons learned review provides a powerful method of sharing ideas for improving work processes, operations, quality, safety and cost effectiveness, etc, it also assists in refining management decision making and worker performance through every phase of a project.

Learning from experience is proven to be an effective management tool, providing the experience and outcomes are deemed to be positive and constructive. A timely and robust post works review process will promote the avoidance of repeat mistakes and will secure the best approach to managing works effectively.

Works completion wash-up meetings are an excellent means of reviewing the lessons learned from a project, providing the issues are aired in an open meeting where the spirit and values of the meeting are honest, constructive and embraces a culture of no blame, understanding and learning. The added value of such a review is the applied dissemination of the lessons learned to other service groups who may benefit from the experience.

The addition of a 'lessons learned' item to meeting agendas can also provide a useful prompt for projects, processes and service delivery benefits and outcomes to be discussed.

### 3. Action Plan

The final stage of the strategy is to set up and implement an 'Action Plan' in order to address the issue(s) identified in the Lessons Learned Register. Figure 3.1 below outlines key Action Plan activities.



**Figure 3.1 – Actioning 'Lessons Learned'**



For each registered event in the Action Plan the following review approach may be considered, reflective of the status and complexity of the event as follows:

- Identify the problem
- Reference on register
- Communicate the problem – who, when, what
- Timescale for review
- Implications – e.g., finance resource timescale, process
- Identify problem resolved
- Identify solution provided (if appropriate)
- Action / communicate solution (draft / trial)
- Monitor effects / listen and learn
- Review outcomes of trial – positive / neutral / negative
- Implement solution if appropriate
- Disseminate changes for comments
- Adopt / change process
- Adopt / change policies and procedures
- Update documentation

The 'Action Plan' defines what action should be taken, why the action is necessary, who is responsible for taking the action and when the action was taken and finally the plan is signed-off with an action status e.g. In Progress or Complete.

An important aspect of the 'Action Plan' is the dissemination of the Lessons Learned to the wider audience who need to be alerted of the issues defined and the mitigation actions taken. This may for example be accomplished through discussion and documented in Service project or programme Meetings in which the various highways infrastructure teams are represented, through team toolbox talks and through periodic management team meetings, as appropriate. In this way the implementation of the Lessons Learned may be addressed at Senior Management Team level and/or at local team level as deemed necessary.

#### **4. Summary & Conclusion**

By conducting a 'Lessons Learned Review' we can reflect on the problems and challenges presented for a particular project and activity and consider potential mitigation measures that would remove or lessen the negative impact of these and provide a better outcome for service delivery.

Conversely for those events that result in a positive service delivery impact, the lessons learned may be applied to other projects thereby providing a robust process and model for future application and implementation.

Such information may be readily communicated to all interested service providers which in turn arms them with the knowledge and ability to assimilate the challenges and apply the solutions to support their own projects and service activities.