



# *Business Success Through Innovative Project Management Solutions*

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## Lessons Learned

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Lessons Learned is the knowledge gained from experience, successful or otherwise, for the purpose of improving future performance.

- A tip to enhance future performance or an adverse situation to avoid
- A solution to a problem or a preventive action
- QA/QC is a key player gathering information to feed a Lessons Learned register
- Lessons that can improve your work practices

Pathfinder's "Lessons Learned" methodology follows a 5 step approach, structured to orient the team to relevant project background information, facilitate a workshop with participation of key personnel, and yield succinct, targeted "Lessons Learned" observations and conclusions which can be readily accessed and integrated into project risk mitigation and planning processes.

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### **FIVE STEP APPROACH**

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#### **Step 1 – Planning and Design (approx. 2 weeks)**

During this Step, Pathfinder begins the initial planning for the Workshop and Feedback sessions by reviewing advance information such as:

- Staffing Plan
- Budgets (Operations/Maintenance) (including manhours, costs and expected implementation schedule)
- Actual Work Orders/Projects accomplished (with actual costs, manhours and dates)
- Maintenance Procedures (including work order development, planning, work order scheduling, engineering support, etc., including provisions for Pre-Turnaround and Post-Turnaround work effort determination, as well as provisions for "unscheduled" or "discovery" work)
- Etc.

During this Step, based on the advance information received, a concise (approximately 2 page) Lessons Learned questionnaire would be developed jointly with client representatives.

#### **Step 2 – Questionnaire Analysis, Interview Preparation (5 working days)**

During this Step, Pathfinder reviews the complete questionnaire, develops the interview questions and finalizes logistics for the interview sessions and issues the Workshop brief. Questionnaires would be returned directly to Pathfinder to assure the responders of anonymity to allow for totally open input.

The questionnaires developed during Step 1 are used as a partial basis for these discussions as well as a "platform" for the development of topical coverage for an interactive Workshop wherein in "seed" questions and Lessons

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## Lessons Learned

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Learned derived from the questionnaires and interviews are presented for discussion, clarification and development of supplemental Lessons Learned.

### Step 3 – Interviews (1 week)

During this step, Pathfinder travels to the client's site to conduct the interviews. Each interview will be ~60 to 90 minutes in length, depending on the topical coverage and category of personnel involved.

### Step 4 – Workshop Finalization and Facilitation (3-4 days)

Pathfinder remains on site to review and summarize the responses to the Questionnaire and collate/consolidate Interview results. This data, coupled with the advance information reviewed during Step 1, will be utilized to finalize the Workshop agendas and presentations to be utilized the following week.

This effort is expected to take 3 days and would be followed by a 1 day interactive Workshop for Department Management and selected departmental personnel.

The tentative Agenda for this session is as follows:

- Introduction/Objectives of the Session
- Discussion of Strengths Identified from Questionnaire/Interviews/development of “supplemental” Lessons Learned
- Discussion of Gaps Identified from Questionnaires/Interviews/development of “supplemental” Lessons Learned
- Gap Closure Options/Actions
- Action item Assignments
- Summary

This step is a facilitated interactive working session involving cross-functional representation from various client departments, including Maintenance, Operations, Engineering, and Construction Management.

### Step 5 – Summary Report

Pathfinder documents all findings, conclusions and action items from the Interview and Workshop Sessions into a Summary Lessons Learned Report.

Format of the Report is as follows:

- Executive Summary
- Background
- Lessons Learned Methodology
- Observations
- Conclusions/Recommendations
- Exhibits/Appendices



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