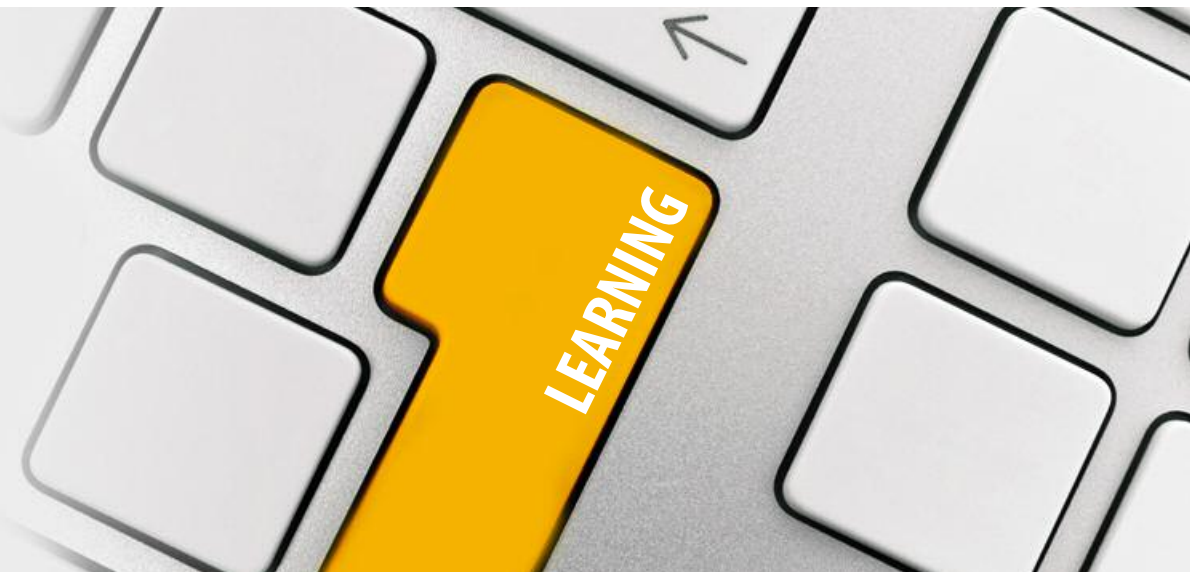


# LEARNING HANDBOOK

Guidance and tools to support systematic learning before, during and after project activity in health and care



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*“Life is divided into three terms – that which was, which is, and which will be. Let us learn from the past to profit by the present and from the present, to live better in the future”*

William Wordsworth

Through each experience we learn and develop as individuals, so learning often feels quite natural. Yet learning is much like an art and a skill in that it can be developed and perfected. When considered carefully, learning can be very powerful for individuals and organisations in the pursuit of continuous improvement.

Taking a systematic approach to learning involves a conscious decision to capture valuable lessons that will inform best practices and future activities to give the greatest chance of improved outcomes. The value of learning is in its application, and the process is a cycle of learning before, during and after key events and outcomes.

This handbook has been inspired largely by the works of [Nick Milton](#), [Chris Collison](#) and [Geoff Parcell](#). No matter the project or topic, it aims to guide you through the process of learning systematically to get the most value from the activity.

As a basis for effective learning we recommend you start with the sections on ‘capture’ and ‘share’. This will help ensure you have considered the foundations of building and contributing to a reciprocal culture within your organisation of sharing openly, in the spirit that there are no mistakes, only valuable lessons learned.

A wide range of tools have been included and sign-posted within this handbook, accompanied by guidance on things to consider and think through. Many of the tools included can be used flexibly at any stage of a project or throughout, and so whether cited in the before, during or after section, it is recommended that should you find a particular approach to work well for you, you adapt it as needed to learn before, during and after as you require.

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*“How many emperors and how many princes have lived and died and no record of them remains, and they only sought to gain dominions and riches in order that their fame might be ever-lasting”*

Leonardo da Vinci

## How will you capture and store learning?

A very important step to consider is how you record, track and store learning both for your own benefit, and for others in your team, wider organisation and even further afield if appropriate. The fine details of what we know, the experiences we have, and the learning we have gained through them is often stored only in our heads (tacit knowledge) where we are the sole librarian organising, filtering, reflecting, analysing and deciding what can be shared with others. It is through our interactions with others that we share our knowledge, in discussion for example. By turning it into a format that is more widely accessible (explicit knowledge) its impact is greater as it has the potential for much wider spread.



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Our heads are full of knowledge and lessons we have learned, but not all of it is of interest or value to others. When considering what learning is valuable enough to capture in a format that can then be accessed by others, it is important to get the balance right so as not to end up with a very large number of lessons that are of interest or value to only a few.

It's also important to consider the practical side of how you will record and store learning so that it is easy to retrieve and understand at a later point. Whichever format and approach you use, consistency will be key to make it as effective as possible, and help to provide clear guidance to others so that they can retrieve learning as well as add their own into the system.

## ■ How do I know when to capture learning?

As a general rule of thumb, if the outcome of an activity has been surprisingly positive or negative it is worthy of capture in some way as it is an unexpected result which would not necessarily have been anticipated by others. [Capturing learning](#) will minimise the chance of repeating negative outcomes, and increase the likelihood of repetitive success.



## ■ How can I store learning so it is easy to retrieve and understand?

Check first whether your organisation already has a recommended approach to capture and store learning. You may find there are two levels, the first of which is for in-team learning and the second a central organisation-wide system. Should your organisation have neither, it is relatively straightforward to develop your own [lessons learned log](#) and [lessons report](#) using an evolving and flexible format that can be adapted to make sure its content is kept relevant and timely. The format you use can be as advanced as you wish to make it, although keeping it simple will ensure it remains accessible to others. You may find this [lessons learned log template](#) and this [lessons report template](#) useful starting points.



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*“A smart man makes a mistake, learns from it and never makes that mistake again. But a wise man finds a smart man and learns from him how to avoid the mistake altogether”*

Roy H. Williams

## How will you share your learning with others?

Once captured, learning can be forgotten easily if thought isn't given to sharing it with those who would benefit from it. You may have developed an impressive lessons learned log for example, but without a strategy to spread the learning it contains, its value will remain unrecognised and its impact restricted to you only.

Moreover, in later sections you'll see that learning often involves connecting with others and asking for their input. As good practice in accessing the learning from others, you should proactively share your own learning. In doing so, a mutual exchange happens which can span within and across the organisation, becoming a cycle that builds a culture of learning and sharing.



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In order to benefit from the learning of others to help shape and inform your work, it's a good idea to plan and consider how and when you will share with them too. The end goal is to establish and maintain an exchange of learning that is of mutual benefit and over time builds trust between individuals, teams and organisations as appropriate. This will give confidence in sharing the recommended actions of lessons learned from negative as well as positive outcomes.

There can be sensitivity in sharing learning that is rooted in a negative outcome, particularly between teams and especially between organisations. Culture has a big impact on how effective teams and organisation systematically learn. It's important to consider the audience that you are sharing your learning with of course, to ensure it's relevant as well as appropriate, but keep in mind that there are no mistakes, only valuable lessons and recommended actions for the future. The philosophy behind learning activities is 'to gain, not to blame'.





## ■ How can I share learning effectively within my team?

Developing a team-wide [lessons learned log](#) where everyone has input on its design and format can be an effective way to introduce systematic sharing of learning within a team, whether focused on a collective goal or working in different areas. Reflecting on the log in team meetings and discussing new inserts regularly is something to consider. Other ideas include a [tool treasure hunt](#) which is a group activity to share learning, and the [blame versus gain](#) exercise that can be especially helpful for leaders to understand what facilitates and blocks open sharing in their team.

## How can I share learning with external stakeholders?

- The fine detail held within a [retrospect review](#), which is completed after a project ends, may not be appropriate or relevant to share with other organisations. It may be more fitting to distil the key learning about to the impact on outcomes for example, through [blogs](#), [case studies](#), [presentations](#) or [learning events](#).



## ■ What formats are effective in sharing learning so it has impact?

There is a range of free software available online for you to explore and consider different [sharing formats](#) that will help you engage, such as infographics, interactive presentation, animations and apps. Considering your audience is very important in deciding what will likely be effective and engage them. For example, if you aim to engage a busy audience consider use of quick [FAQs](#), [podcasts](#), or [videos](#). If the audience has more time and a vested interest, consider use of [storytelling](#).

## ■ How can I judge if others will openly share their learning with me?

Readiness to actively take part in learning and sharing activities will depend a great deal on the [knowledge sharing cultures](#) of the teams and organisations involved. Taking the time to understand the readiness of colleagues you hope to engage with can help you identify an effective route. [Communities of Practice \(CoPs\)](#) can be a useful way to unite professionals with a common goal or interest for example, which acts as a good foundation for learning and sharing.



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*“Some of the best lessons we ever learn are learned from past mistakes. The error of the past is the wisdom and success of the future”*

Dale Turner

## What would be useful to know before you get started?

As a first step it can be of great benefit to take the time and understand what lessons can be learned from previous experiences in the same area that you are working in. To give your work a stronger starting point, and an increased chance of success, it's often useful to reflect back in order to know what the best plan of action will be to move forward. The aim of learning before taking any action is to proactively avoid pitfalls while identifying the most effective route to success.



Whether working on your own or as part of a team, connecting with people working in your area of interest is an effective way to learn from relevant experiences and knowledge of others. This could include a focus on the learning already held in your own team, finding out what colleagues within your own organisation know, as well as connecting to stakeholder groups.

Bear in mind that if you ask people to share their knowledge with you for the benefit of your work, it's a good idea to share with them in return what you know already and also what you learn during and afterwards. This will encourage a back and forth of sharing lessons learned to the benefit of both sides, not only for the current work at hand but for the future.

## ■ What do you know about the area of interest already?

Pulling together relevant documents you already have (explicit knowledge) and writing down what you know from experience (tacit knowledge) is a useful starting point. To do this systematically, consider carrying out a [before action review](#) which draws together what you / your team know already to identify what knowledge gaps there are. If working in a team you might also find a [spectrogram](#) useful, as well as an interactive team building exercise.



## ■ Do you know who has the relevant experience and knowledge you need?

Many organisations have an intranet facility and some have collaboration software or platforms to help colleagues connect, e.g. [Yammer](#), [SharePoint](#). It's a good idea to check whether [staff profiles](#) are used in your organisation in some way, which capture skills and experience so you can identify who to approach about your work. This can also lead you to identify relevant stakeholders by identifying which networks your colleagues are aware of and / or involved in already.

## ■ What sources of intelligence might others recommend to you?

Collecting documents and / or references to journal articles, research papers and reports for example can point you in the direction of useful intelligence to inform your work. This could include work they have themselves produced and are able to share (known as [knowledge assets](#)), or the work of others that they are familiar with. Our [Intelligence Handbook](#) includes a range of tools and guidance to get the most from this activity.



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## ■ How can you capture the experience and knowledge stored in someone's head?

There are a number of activities which aim to capture past experiences while stimulating new ideas and thinking based on lessons learned already. Most often these activities involve a facilitated discussion and recording it for future reference, i.e. turning experiences (tacit knowledge) into written documents (explicit knowledge) so they can be kept and shared more widely. Examples include a [knowledge café](#), a [peer assist](#), a [thinking council](#) and [speed geeking](#).

## ■ Do you have a strategy in mind for when learning activities will take place?

Learning happens continuously for individuals but without a plan of action to capture and share it with others, the benefit of the lesson learned can be restricted to that individual only. Consider using a [PDSA \(plan do study act\)](#) cycle as a systematic method to reflect and learn from your work throughout its duration at key stages, with the aim to continuously make improvements.



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*“There are no mistakes. The events we bring upon ourselves, no matter how unpleasant, are necessary in order to learn what we need to learn; whatever steps we take, they’re necessary to reach the places we’ve chosen to go”*

Richard Bach

## How will you adapt and adjust to lessons learned during your work?

Whatever your measure of success, staying flexible and adapting will be a key strategy to improve your chances of achieving what it is you set out to. Learning during your work will happen somewhat naturally as things go right and things go wrong. Taking time to reflect and capture it in a meaningful way can inform next steps and justify changes in approach as a way to get even better outcomes. The value of learning is in its application and this need not be only in hindsight at the end of a project, but throughout its duration.



Adapting your work to lessons learned along the way is an ongoing and continuous process which involves reflection on what has happened so far, and consideration of what it means for the next steps ahead. Learning is often prompted by an experience or outcome that was detrimental in some way to progress, but it need not be limited to a focus on 'failings', 'mistakes' or 'mishaps'.

It is important of course to reflect when things do not go as planned to minimise the chance of recurrence, but equally valuable to reflect when things go well in order to maximise the chance of recurrence. A key aim of learning during is to provide you with informed choices to decide on the best route to achieve your goals.

## ■ How can you identify the cause of a problem while finding a solution?

A problem presents a fantastic learning opportunity to not only identify root causes while also generating ideas for solutions for the benefit of present and future tasks. There are a number of tools designed to identify and tackle challenges such as the [reframing matrix](#), which encourages consideration of a problem from multiple angles; the [five whys](#), which is useful to identify glitches in processes and practice at a team or organisational level; and an [action learning set](#), with a focus on realistic actions to address a workplace problem.





## ■ How will you make sure that no learning opportunities are missed?

Taking a systematic approach and planning in advance when learning activities will take place can be a good strategy to make sure that all lessons are captured, including the positive ones. An [after action review](#), for example, could be carried out after key stages or steps in a project regardless of their outcome; and use of a [PDSA \(plan do study act\) cycle](#) also applies a rigorous methodology that schedules reflective learning after key stages to ensure a project continuously improves throughout its duration. Some workplaces also use [coaching](#) as a form of workplace learning and development.

## ■ Are there key events that offer a great learning opportunity to inform your work?

Whether hosted or attended, an event which brings together a range of stakeholders and organisations of interest to your work offers an opportunity for targeted learning. Taking a considered approach to [learning at events](#), before, during or after in terms of the learning cycle, will be important to get the most value from this activity.



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[Post project interviews»](#)[Closing circle»](#)[Most significant change»](#)[Exit interviews»](#)[Retrospect reviews»](#)[After action review»](#)[PDSA»](#)

*“Change is the end result of all learning”*

Leo Buscaglia

## What would you change or do differently next time to achieve better outcomes?

Once delivered it's tempting to move onto the next activity, project or programme, but there is real value in taking a step back to view the experience as a whole. At this stage you can see more objectively what could be improved next time around. Even if the experience would never be repeated in its entirety, lessons learned are often transferrable and of great benefit to others working in the same area. Learning after is not constrained to an evaluation of the impact of your work, but includes reflection on all processes and practices to make positive changes / recommendations to inform future activities.



In looking back at what has happened at each stage in light of the outcomes achieved, the aim is that 'learning after' feeds into future work and becomes an input to future 'learning before' activity. The learning cycle is continuous.

Careful consideration of the timing of learning activities that come afterwards is important so that enough time has passed to gather meaningful reflections and thoughts, but not so much time as to have forgotten the finer details. There are a number of tools that can be useful at project or programme close.

## ■ How will you capture learning from everyone involved?

A number of tools take the approach of reflecting back in order to consider and plan ahead for the future, with some appropriate for use with individuals, teams and wider stakeholders. For example, [post project interviews](#) focus on team members to collate all learning into one knowledge asset; a [closing circle](#) is held at the end of a learning activity which involves smaller groups, to bring everyone together to share their learning; and an [MSC \(most significant change\)](#) exercise involves storytelling from multiple angles including stakeholders.



## ■ How can you prevent a loss of learning when staff move on?

You may work with consultants or members of staff may leave your team or organisation, taking their knowledge and experience with them. Harvesting knowledge from staff before they depart is a really important step to make sure their learning is captured and retained for the benefit of future work. Use of [exit interviews](#) can be of great value especially when carried out systematically across the breadth of an organisation with the learning stored centrally for all to access.

## ■ How will you make sure that no learning opportunities are missed afterwards?

As good practice at the end of any project, completing a [retrospect review](#) will ensure that learning across a whole team, including relevant stakeholders, is captured and stored for future reference. Making this an essential step in programme or project management within your organisation will ensure that as part of standard close down practices there is time dedicated to this activity. Incorporating the [after action review](#) into a [PDSA \(plan do study act\)](#) cycle is a good example of this.



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Many of the tools referenced within this handbook have been inspired by a number of online freely accessible resources. Where relevant we have highlighted 'further reading' within the tools so that you can trace back to the original sources. As we've sign-posted to many other sites and organisations, should you notice a hyperlink that is no longer working please do let us know: [knowledgemanagement@nhs.uk](mailto:knowledgemanagement@nhs.uk)

## LINKS & RESOURCES

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