

# Guidelines for successful Learning Teams



## What is a learning team and why are they useful?

Learning teams bring together a group of people who were involved in a safety incident, or who might have useful information about it, to learn and improve – both when things have gone well or when things have gone wrong.

### They're useful in Contact because:

- they're simpler and faster than traditional safety investigations
- they produce better outcomes and actions because we don't focus on blame
- we understand and learn better because we involve the people that actually do the work.

**Learning teams are fluid but we've learned through experience some things that help ensure they're successful.**

We'd like to thank Todd Conklin, the brains behind Learning Teams, for giving us the inspiration and helping us execute the idea. You'll find Todd's podcast with us here: [https://youtu.be/8ov\\_PMP0\\_Qw](https://youtu.be/8ov_PMP0_Qw)

## ① Preparation

Hold the learning team as soon as practical after the incident, event or activity (when information and memory is still fresh).

### Engage a good facilitator

This doesn't have to be someone close to the event, but needs to be someone who can ensure good participation and keep the team on task.

### Have a note taker

Use a whiteboard or flip charts so everyone can see. Someone to help with this will take pressure off the facilitator so they can stay on task. Recording the conversation and photographing what you write on boards is also helpful.

### Get the right people in the room

Include everyone involved in the event if possible (including contractors). Consider any technical experts that might provide good input (but don't let them dominate the discussion on how things **should** have gone). And, use diverse people – fresh eyes and questions are really useful.

### Get the right room and right time

Use a good meeting room. In some cases it's helpful to head to the 'scene' – where the work was carried out. Learning teams can take time so make sure you allow enough – experience says a couple of hours. Sometimes a second one is needed if there's a lot to learn. Late morning is probably better than late afternoon for alertness. Plan for breaks.

## ② Set the scene

**Explain what a learning team is and its purpose. Discuss ground rules and invite the group to agree to ground rules that best resonate with them.**

### Ground Rules

Here are some suggestions that have helped us – change them to suit the group:

- Enjoy the opportunity to be involved, bring a positive attitude!
- Leave hierarchy at the door.
- Actively participate – don't wait to be asked.
- Let everyone share the airways – be concise.
- Respect diversity of views.
- Listen for 'intent'.
- Ask different questions, take multiple perspectives, see systems and experiment on the periphery.
- Put mobiles on silent – take calls in breaks.
- It isn't a place for blaming – as soon it starts the learning stops!

## ③ Learning team guidance for an event or incident with an unexpected outcome

**First, always start by checking in on how the people involved are feeling – some will be in the room while others will not.**

Second, allow people to tell their own stories about what happened – people experience things differently and things may have happened concurrently. Everyone's stories are important. Constructing a timeline might help with this.

Remember not to jump to solutions until you've explored all of the possibilities.

Some other great questions to ask are:

- What could have happened?
- What worked well?
- What surprised us?
- How did our system set a worker up for this failure?

Brainstorm the conditions that were in play leading up to the event and define which ones were critical. Encourage people to think broadly and deeply, eg how the work was planned, organised and executed should be considered alongside other conditions such as the weather, or other work happening. Conditions might also include how people were feeling eg "I was tired" or circumstances, such as "I pushed the wrong start button".

The actions of some of the people in the room may have contributed to the event, but remember most of these actions won't have been deliberate or malicious – it's often a lapse or mistake. If the behaviour was reckless a learning team probably isn't the right approach.

Prioritise areas that require improvement and determine the required actions to address these.

Don't try to fix everything. Here's some things to consider:

- A simple voting system, such as asking everyone to put a tick by their top 3 can be effective.
- Re-check – are the actions strengthening our defences?
- Are the actions nice-to-haves or must-haves?

## ④ Learning team guidance for exploring successful work

**When work goes well it's a great opportunity to identify the reasons it did and capture them for future learnings.**

Let people tell their story, then try the following questions:

- What happened the way you thought it would?
- What surprised you during the work?
- What hazards did you identify, and which ones did you miss?
- Where did you have to 'make do', or adapt?
- What made the work different to other work?

Identify and prioritise the critical differences and determine what actions are required to capitalise on them.

## ⑤ Implementing and sharing learnings

**Before wrapping up the learning session there are still a few questions to ask yourselves.**

- What else did we learn that wasn't related to the event?
- Where else could this happen?
- Who else needs to know about this?
- How significant are the learnings?
- How far do we need to share them?
- What is the best way to do this in our organisation?
- What does good look like and what could be different as a result of these learnings?
- How will we know if our defences are better?

Assign actions and also identify the people who will take ownership of the learnings. Make sure learnings are shared and communicate feedback to the team.