



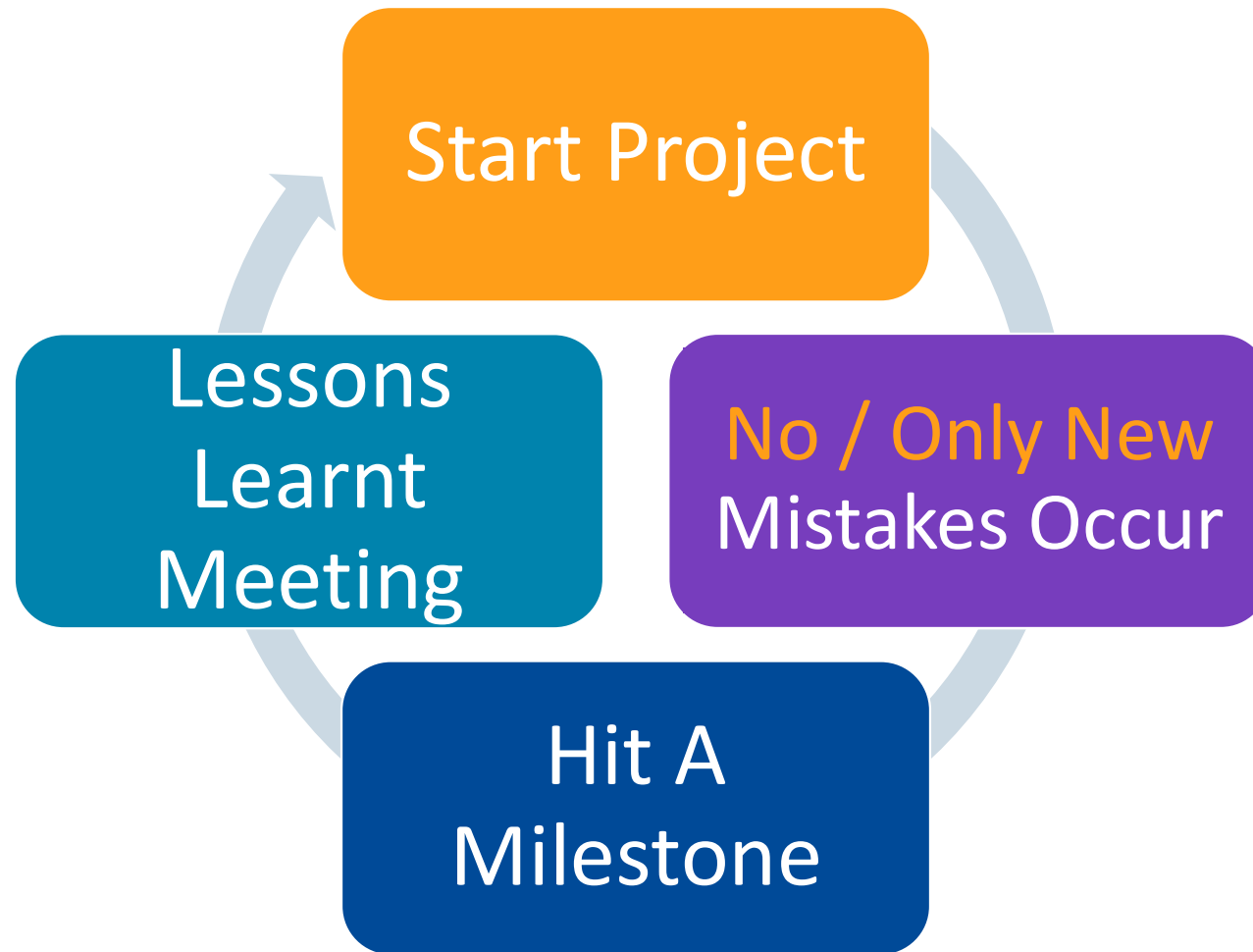
Learning Lessons

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?



USA Headquarters

1300 Virginia Drive, Suite 408
Fort Washington, PA 19034 USA
Phone: +1 215 283 6035

Armenia

3 Barbusse, 0028
Yerevan, Armenia
Phone: +374 60 541515

India

#729, 8th Main,
11th Cross, J.P. Towers
JP Nagar 3rd Phase
Bangalore - 560 076
Karnataka, India
Phone: +91 80 2658 5551

ClinChoice INTERNATIONAL

Italy

Via Giorgio De Sandre, 3
37135 Verona
Italy
Phone: +39 045 8222811

The Philippines

17th Floor
Wynsum Corporate Plaza
22 F. Ortigas Jr. Road, Ortigas Center
Pasig City - 1605
The Philippines
Phone: +632 8633 5176

United Kingdom

Suite G48
268 Bath Road, Slough, SL1 4DX
Berkshire, United Kingdom
Phone: +44 1628 566121

ClinChoice APAC

China Headquarters

Floor 11, No. 420 Fenglin Road
Xuhui District
Shanghai 430000, China
Phone: +86 131 6605 5889

Australia

225 Bagot Road,
Subiaco WA6008
Phone: +61 449258854

Japan

THE GATE NIHONBASHI Bld. 3F Higashi
Nihonbashi 3-4-1, Chuo-ku
Tokyo 104-0031 Japan
Phone: +81 3 6228 7360

Singapore

2 Venture Drive,
#10-23 Vision Exchange
Singapore 608526
Phone: +65 9832 5230



www.clinchoice.com



info@clinchoice.com