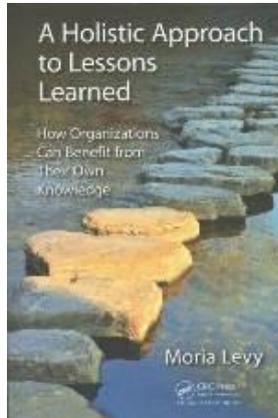

PM WORLD BOOK REVIEW



Book Title: ***A Holistic Approach to Lessons Learned: How Organizations Can Benefit from Their Own Knowledge***

Author: **Moria Levy**

Publisher: CRC Press

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Reviewer: **Anna Bartlett**

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Introduction

The book *A Holistic Approach to Lessons Learned: How Organizations Can Benefit from Their Own Knowledge* details from research and the author's experience the components to a comprehensive lessons learned management practice and practical steps for how to implement this.

Moria Levy's premise of having a holistic approach to organizational performance improvements by lessons learned management is emphasized because isolated methods, such as debriefing, task management or procedures updates, do not achieve actual improvement. Levy's presented model focuses on creating and implementing a full life-cycle management of lessons and good practices in the organization. This includes knowledge creation, refinement, and integration into the organizational environment in ways that empower utilization.

Overview of Book's Structure

Chapter one discusses the challenges and repeat losses organizations experience that could be mitigated by lesson learning and management. Chapters two through five discuss ways to create knowledge, including: methods for producing lessons, sources of new knowledge, complementary learning tools, and the most overlooked source of knowledge, experience. Chapters six and seven cover how to process the knowledge gathered and how processing must go beyond isolated tasks and changes. Chapter six details how the process should include unique long-term actions, short-term tasks, and medium-term change management. This chapter also identifies that the management for each of these is unique, and not clearly separating and managing these three categories has negative impact on the organization. Chapter seven dives deeper into managing and refining the created knowledge, detailing ways to maximize accessibility to lessons learned by using a knowledgebase.

The remainder of the book focuses on how to incorporate the knowledge and lessons learned into the organizational environment. Chapter eight shares that solutions for instilling knowledge into the organizational environment will need to be customized to fit the needs of the organization. This chapter includes methods and tools that can be used as described or inspire other solutions. Chapter nine describes methods for not only making knowledge easily accessible by employees, but also empowering employees to implement the knowledge prior to future actions being taken.

Chapters 10-12 focus on practical steps for implementing this model of lesson learning and management into the organization. Topics covered include: gaining buy-in from management, ways of implementing change management, and key roles and responsibilities for supporting the new model. Chapter 13 closes out the book with a summarized high-level overview of key take-aways from each chapter.

Highlights

Some of the key points Levy makes to be considered when working to establish or grow a lessons learned management practice are that the greatest barrier to this practice is a lack of available time—perceived or actual—to invest in the life-cycle of lessons learned management; however, lessons learned management does not have to be excessively time consuming. All lessons learned should be managed by one person. A senior manager should be the one to identify tasks and lessons from a recommendation. Lessons may be relevant to many cases, not only cases similar to the context during which the original lesson was learned. Each lesson should be distilled into a concise, easily understood sentence or paragraph that adds value to the organization and does not contradict or duplicate existing lessons learned. Lessons should be managed as independent entities with assigned attributes and values in a knowledgebase, not a database. To be utilized, relevant lessons must be easily accessible in intuitive ways.

Highlights: What I liked!

This reviewer found the following concepts intriguing.

- When designing a knowledge base for recording lessons learned, include a field to identify a next validation date for each lesson entered. The validation date identifies when the lesson will be re-evaluated for relevance to the organization. If unsure how often to validate lessons, start with a default of two years and adjust from there.
- In the lessons learned knowledgebase, assign lessons a sensitivity level. This identifies which lessons are most relevant based on the seeker's level of experience. For example, a sensitivity level of 1 means all levels of experience can view the lesson, while a level 5 would only show to those who define themselves as beginners in the discipline, etc.
- When embedding access to lessons learned in the organization, use tools to connect information being accessed to relevant lessons, not all.

- An idea for identifying applicable lessons learned preemptively is to add a section in the organization's project management plan template for the project manager to include three lessons learned from other projects that are relevant to the current situation.

Who might benefit from the Book

A Holistic Approach to Lessons Learned: How Organizations Can Benefit from Their Own Knowledge by Moria Levy would be beneficial to beginners in the field of project management, and essential to individuals involved in lessons learned management at their organization who are looking to start or build their organization's lessons learned management practice.

Conclusion

This book is a fantastic resource for learning the life-cycle of lessons learned management and practical steps for implementing or improving a lessons learned management practice at one's organization. Readers will gain a comprehensive knowledge of what can be done to ensure that once a lesson is learned, that new knowledge is taken into account prior to future endeavors so the organization doesn't need to learn the same lesson twice.

For more about this book, go to: <https://www.routledge.com/A-Holistic-Approach-to-Lessons-Learned-How-Organizations-Can-Benefit-from/Levy/p/book/9781138564763>

Editor's note: This book review was the result of a partnership between the publisher, PM World and the [PMI Silver Spring Chapter](#). Authors and publishers provide the books to PM World; books are delivered to the PMI Silver Spring Chapter, where they are offered free to PMI members to review; book reviews are published in the PM World Journal and PM World Library. PMI Silver Spring Chapter members can keep the books as well as claim PDUs for PMP recertification when their reviews are published. Chapter members are generally mid-career professionals, the audience for most project management books. If you are an author or publisher of a project management-related book, and would like the book reviewed through this program, please contact editor@peworldjournal.com.

About the Reviewer



Anna Bartlett

Maryland, USA



Anna Bartlett is a certified Project Management Professional (PMP) with detailed experience providing inception-to-extinction management of IT projects and a diverse background in corporate change management, communications, and publication management. Currently Bartlett serves as a Project and Change Management Associate supporting the USA National Institutes of Health Business System Program Management Office. Bartlett is a member of the Silver Spring MD Chapter of PMI.