# Lessons Learned

## Purpose

This guidance sets out a **consistent and proportionate approach** for capturing, analysing and applying **lessons learned** from your contracts.

Effective lessons learned processes help to:

- Improve future contract and supplier management
- Strengthen commercial capability
- Reduce the risk of repeat failures
- Support continuous improvement and value for money
- Enhance transparency, accountability and public trust

All those involved with the bid and/or contract, both in your Organisation and the bidder Organisations, should be asked for feedback.  This could include a variety of roles e.g. contract managers, procurement officers, logistics, estate managers, etc.

## Scope

This guidance applies to:

- **Medium/high value contracts** (as defined by organisational or sectoral thresholds)
- **Medium/high risk or complex contracts**, including:
    - Novel or first-of-type arrangements
    - Strategic or critical services
    - Long-term or high-dependency suppliers
    - Contracts subject to significant change, dispute or performance challenge

Lessons learned should be captured at **key points across the contract lifecycle**, not only at contract end.

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## Principles

Lessons learned activity should be:

- **Proportionate** – scaled to contract value, risk and complexity
- **Timely** – captured while information and insight are still fresh
- **Evidence-based** – grounded in facts, data and documented experience
- **Blame-free** – focused on learning, not fault
- **Action-oriented** – resulting in clear improvements and changes
- **Shared** – disseminated appropriately to benefit the wider organisation and sector

### When to Capture Lessons Learned

Open or close

Lessons learned should be captured at **planned points** and **trigger events**, including:

### Planned Points

- End of mobilisation / transition phase
- Annual or major performance reviews
- Key contract milestones
- Contract closure or exit

### Trigger Events

- Significant performance failure or service disruption
- Major contract variation or scope change
- Commercial dispute or escalation
- Supplier financial distress or ownership change
- External audit, assurance or ministerial interest

## Roles and Responsibilities

Open or close

Below is an example of some of the roles who may be responsible for capturing lessons learned at the relevant stage of a contract.

The roles you include should be proportionate and relevant to your contract and Organisation:

### Senior Responsible Owner (SRO)

- Ensures lessons learned activity is undertaken
- Champions a learning culture
- Approves final lessons learned outputs

### Contract Manager

- Leads the lessons learned process
- Coordinates input from stakeholders
- Ensures findings are documented and shared

### Commercial / Procurement Teams

- Provide structured challenge and commercial insight
- Ensure learning feeds into future procurement exercises
- Maintain organisational lessons learned repositories

### Suppliers

- Contribute openly and constructively
- Share their own lessons and improvement actions
- Participate in joint reviews where appropriate

## How to Capture Lessons Learned

Open or close

## Preparation

Before undertaking a lessons learned review:

- Define the **scope** (what period, phase or issue is being reviewed)
- Identify **participants** (contract team, users, finance, legal, supplier)
- Gather **evidence**, such as:
    - Performance reports and KPIs
    - Risk and issue logs
    - Change control records
    - Financial and commercial data
    - Audit or assurance findings

## Structured Review Approach

Use a **standard structure** to ensure consistency and comparability. Reviews should typically consider:

### Contract Strategy and Design

- Were objectives, outcomes and success measures clear?
- Was the risk allocation appropriate?
- Were assumptions realistic?

### Mobilisation and Transition

- Was mobilisation adequately planned and resourced?
- Were roles, responsibilities and governance clear?
- Were dependencies understood and managed?

### Supplier Performance and Relationship

- How effective was supplier performance management?
- Were issues identified and addressed early?
- Was the relationship collaborative but appropriately robust?

### Commercial and Financial Management

- Were pricing, incentives and payment mechanisms effective?
- How well were variations and change managed?
- Were value for money and affordability maintained?

**Risk, Resilience and Assurance**

- Were risks identified, mitigated and monitored effectively?
- How resilient was the service and supply chain?
- Did governance and assurance arrangements work as intended?

**Skills and Capability**

- Did the contract team have the right skills and capacity?
- Was support accessed when required?

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## Recording Lessons Learned

Each lesson should be recorded clearly and consistently, including:

- **What happened** (fact-based description)
- **Why it happened** (root cause)
- **Impact** (cost, performance, reputation, service users)
- **What worked well** (to be repeated)
- **What could be improved** (to be changed)
- **Action required** (specific and measurable)

You should try to avoid using vague statements; lessons should be **specific and transferable**.

There is a **Lessons Learned Template** available for you to use, which can be found at the bottom of this page.

There are also **two populated examples** of the **Lesson Learned Template**, to demonstrate how the template can be used. These can also be found at the bottom

of the page.

## Turning Lessons into Action

Open or close

Lessons learned only add value if they result in **real change**.

### Action Planning

- Assign ownership for each improvement action
- Set timescales and success measures
- Link actions to existing improvement or capability plans

### Integration into Business-as-Usual

Lessons should inform:

- Future procurement strategies and business cases
- Contract management plans and templates
- Risk management and assurance approaches
- Training and capability development
- Standard terms, conditions and commercial models

## Sharing and Knowledge Management

Open or close

### Internal Sharing

- Store lessons learned in a **central, searchable repository**
- Share summaries with procurement, commercial and assurance teams
- Use anonymised case studies where appropriate

### Cross-Organisation and Sector Learning

For significant contracts, consider:

- Sharing learning through sector forums or Centres of Expertise

- Contributing to Scottish Government or public sector guidance updates
- Supporting peer learning across organisations

### Governance and Assurance

Open or close

- Lessons learned activity should be **visible within governance structures**
- Completion and follow-up actions should be monitored

### Care and Support Services

Open or close

For Care and Support Services, please read the **Care and Support Services Lessons Learned Guidance**, which can be found at the bottom of this page.

Checklist

Checklist

## Key Success Factors

Effective lessons learned processes depend on:

- Senior leadership support
- A culture of openness and improvement
- Consistent methodology and documentation
- Clear accountability for action
- Ongoing reinforcement, not one-off exercises

## Any documents you need are listed below

**Lessons Learned Template**

(file type: docx)

**Lesson Learned Template - Populated Examples**

(file type: docx)

**Care and Support Services Lessons Learned**

(file type: docx)

**YOU HAVE NOW COMPLETED ROUTE 3 HOWEVER PLEASE REMEMBER TO CONTINUALLY UPDATE YOUR STRATEGY.**