


<h1>Project Navigator</h1>				<b>Guideline</b>			
<b>TITLE</b>  <b>LESSONS LEARNED</b>				VALE # <b>NAV-GP-0038</b>		PAGE <b>1/6</b>	
				<b>DM # 621230</b>		REV. <b>3</b>	
EffectiveDate:	Oct 14/14	Revisit Date:	Oct 2015	Prepared By:	PN Working Group 1	Approved By:	Trueman Hirschfeld

## 1.0 PURPOSE

This guideline is to provide a process where lessons learned can be documented / retrieved, discussed and acted upon where required.

## 2.0 REFERENCE DOCUMENTATION

The following documents were used in the development of this document or are related to it. The most recent revision shall be used.

[NAV-LP-0115](#) PMP Database  
[NAV-LP-0116](#) PMP Database Lessons Learned Module Training Presentation

## 3.0 APPLICATION

This is an optional, but recommended process, at the Vale Project Managers discretion.


## 4.0 CONTEXT

Lessons Learned Reviews, sometimes referred to as After Action Reviews, etc... provide an opportunity for reflection after work has been completed to identify what went well, what can be improved upon or what was done differently that should be applied in future. Some areas may record lessons learned as the work progresses. Lessons learned should be recorded in a centralized location to allow personnel managing similar work in future to review these lessons for continual process improvement. Management should review these items and prepare an Action Item Plan where appropriate.

### 4.1 LESSONS LEARNED REPOSITORY

A centralized repository is critical to the success of the Lessons Learned Review process.

The Surface ERM Group uses the Lessons Learned module within the PMP Database as a repository for all lessons learned. This is a searchable database where lessons learned are stored; regardless of the source. Lessons related to PMP work, project work, or other sources may be relevant to various types of future work and should be captured.

<h1>Project Navigator</h1>				<b>Guideline</b>			
<b>TITLE</b>  <b>LESSONS LEARNED</b>				VALE # <b>NAV-GP-0038</b>		PAGE <b>2/6</b>	
				<b>DM # 621230</b>		REV. <b>3</b>	
EffectiveDate:	Oct 14/14	Revisit Date:	Oct 2015	Prepared By:	PN Working Group 1	Approved By:	Trueman Hirschfeld

## 5.0 LESSONS LEARNED PROCESS

During the planning stages of a project and/or a PMP, archived Lessons Learned should be reviewed to ensure issues are addressed proactively and / or to ensure successful practices are continued.

Lessons learned may be recorded during work execution to ensure they are not forgotten.

Within four weeks of the completion of a project or PMP, one or more Lessons Learned Review meetings should be scheduled by the Project Manager / Area PMP Coordinator or their designate.

It is recommended that an internal meeting with the core Vale team is held before having meeting(s) with external service providers or other participants, to ensure issues are identified, and potential areas of conflict are discussed prior to meetings with external participants.

Recommendations are to be identified and reviewed by management. Management should then prepare an Action Item Plan to follow up on these lessons learned where appropriate.

## 6.0 MEETING STRUCTURE

### 6.1 MEETING PREPARATION

Review any lessons that may have been recorded during the execution of the work.


Identify the individual that will act as the Scribe during the meeting.

### 6.2 MEETING STRUCTURE

Review Objective: “The objective of this Lessons Learned Review meeting is to identify what went well, what can be improved upon or what was done differently that should be applied in future. These will be recorded in a central repository to allow personnel managing similar work in future to review these lessons for continual process improvement. Action Items may result for some of the lessons identified during this meeting.”

Review Scope: Review the scope.

Review Meeting Structure: Describe the meeting structure for participants. One approach is as follows: Provide some time for participants to reflect on what went


<h1>Project Navigator</h1>				<b>Guideline</b>			
<b>LESSONS LEARNED</b>				VALE #		PAGE	
				<b>NAV-GP-0038</b>		<b>3/6</b>	
				DM # 621230		REV.	
						<b>3</b>	
EffectiveDate:	Oct 14/14	Revisit Date:	Oct 2015	Prepared By:	PN Working Group 1	Approved By:	Trueman Hirschfeld

well, what did not go well or what was done differently that either worked or did not work. Have each participant describe one or two issues or lessons learned, in turn. Briefly discuss one item at a time and have the Scribe record the group’s consensus of the issue and the lesson learned.

Identifying Lessons Learned: The scribe should accurately record the description of the issue, what was learned, the name of the individual that identified the lesson and any actions that may result. Where practical, it can be an advantage to have the notes projected on a screen in real time as they are recorded (or via Communicator, etc...) to allow participants to ensure the notes taken accurately reflect the discussion.

Description of Issue	Lessons Learned	Name	Action Req'd
<i>e.g. Contractors sometimes take on more work than they can effectively manage.</i>	<i>e.g. Need to track awarded contracts for the PMP and review bidders list for upcoming RFPs.</i>	<i>Name of individual that identified L.L</i>	<i>Describe the Action to be taken and who is responsible. Note: Not all Lessons will require an action.</i>


Responsibilities of the Chair during the meeting: The Project Manager or designate should clearly identify the objective and structure of the meeting and review the work scope with all participants. The Chair must ensure that the meeting continues to flow and must make the call when to “park” a topic. The Chair should also assist the Scribe and dictate when required.

<h1>Project Navigator</h1>				<b>Guideline</b>			
<b>TITLE</b>  <b>LESSONS LEARNED</b>				VALE # <b>NAV-GP-0038</b>		PAGE <b>4/6</b>	
				<b>DM # 621230</b>		REV. <b>3</b>	
EffectiveDate:	Oct 14/14	Revisit Date:	Oct 2015	Prepared By:	PN Working Group 1	Approved By:	Trueman Hirschfeld

### 6.3 MEETING ATTENDEES

Invite the following attendees as appropriate:


Internal Meeting	
Owner	Construction Manager
Sponsor	Project Safety Coordinator
Subject Matter Expert (SME)	Material Coordinator
S/H/E Representatives	Project Cost Controller
Operations Representative	Project Document Controller
Maintenance Representative	Scheduler
Commissioning Team Leader	Project Quality Representative
Start Up Team Leader	Lead Dis. Engineer
Project Manager	Design Team Leader
Study Manager	Engineering Outsourcing Coordinator
Contract Manager	Estimator
Project Engineer	Engineer of Record
Plant Engineering Coordinator	Local Routing Coordinator
External Meeting	
Contractor Representatives (Sr. Mgmt, Safety Rep., Project Manager)	Project Engineer
Project Manager	Cost Controller
Construction Manager	SHE Coordinator

<h1>Project Navigator</h1>				<b>Guideline</b>			
<b>TITLE</b>  <b>LESSONS LEARNED</b>				VALE # <b>NAV-GP-0038</b>		PAGE <b>5/6</b>	
				<b>DM # 621230</b>		REV. <b>3</b>	
EffectiveDate:	Oct 14/14	Revisit Date:	Oct 2015	Prepared By:	PN Working Group 1	Approved By:	Trueman Hirschfeld

## 6.4 INTERNAL MEETING DISCUSSION TOPICS

The following are examples of discussion topics; other items may also be appropriate:

- Safety
  - Safety – General
  - ZES / Locking and Tagging
  - Confined Space
  - Injuries / Incidents
- Quality
  - ERM Project handover packages (completeness/accuracy of packages, how many done, etc)
  - TSSA Work – review ITP’s, etc
- Scope
  - W/O’s and W/I’s by plant (chart)
  - ERM Projects – contracts by plant, and by ERM Project Manager
  - Contracts
  - Engineering work
  - Stats charts – Cost / man-hours / work / injuries
- Schedule
  - Was the contractor schedule adequate
  - Work Breakdown Structure
  - Project Planning – adequate times provided
  - Contractor compliance to schedule
  - Operational compliance to schedule
  - Supplier compliance to schedule
- Cost
  - Review FWI’s, Change Requests, Discovery Work
  - Additions to Scope (PCR, APC)
- Invoicing, Progress Payment, Hold Backs
- Cross-Boundary
  - Scheduling Issues – Down Days, Work not completed
  - Adjacent Projects
  - Power / Utilities Outages
  - Internal Trades
- Area Ramp-Down / Commissioning / Ramp-Up / Production Start-up
  - Training
  - Manuals
  - Commissioning Reports
- Communication
  - Radios
  - Cross Boundary Notifications (Plant Notifications, Record of Impairment etc...)
  - Contractor vs Project Team
  - Engineering vs Project Team
- Logistics
  - Laydown Areas
  - Trailers
  - Traffic Flows
  - Deliveries
- Trade / Resources
  - Internal and External Resources
  - Training
  - Out of Town Allowances
  - Was the job properly resourced

<h1>Project Navigator</h1>				<b>Guideline</b>			
<b>TITLE</b>  <b>LESSONS LEARNED</b>				VALE # <b>NAV-GP-0038</b>		PAGE <b>6/6</b>	
				<b>DM # 621230</b>		REV. <b>3</b>	
EffectiveDate:	Oct 14/14	Revisit Date:	Oct 2015	Prepared By:	PN Working Group 1	Approved By:	Trueman Hirschfeld

- Contractor Performance
- Contractual Compliance

## 6.5 EXTERNAL MEETING DISCUSSION TOPICS

Lessons learned raised during the internal meetings that are related to an external service provider should be discussed during this meeting. This meeting should be conducted as an exit interview, where the Project Team / Area PMP Team are actively listening to the Contractor.

- Scope
  - Was the scope clear? (RFI, FWI)
- Schedule
  - Was the time frame realistic?
- Cost
  - Were the invoices processed in a timely manner?
  - Were your extra's processed in a timely manner?
- Safety
  - Number of Injuries / Conditions – contributing factors
  - Positive Factors affecting Safety
- Internal Meeting Lessons
  - Anything that was raised at the Internal Meeting is brought forward in this Meeting? Both Positive and Negative

## 7.0 APPENDICES

Appendix A: Revision and Transition Notes

### Appendix A: Revision and Transition Notes

(Revisions are listed in reverse chronological order with most recent revision at the top.

Revision notes describe: what was changed, why it was changed, and the plan to implement the change, including whether changes are retroactive)

#### Revision Control Information

Rev #	Date	Nature of Change	Page inserted, replaced, revised or cancelled	Approved by document owner
1	Oct 23/12	Development of Draft	All	T. Hirschfeld
2	Oct 14/14	Yearly Review	Formatting updated, Process section added	T.Hirschfeld
3	May 6/18	Minor	Aligned terminology from PMO to ERM	