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.

Quickfire Guide

Quickfire Guide

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?

Quickfire Guide

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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

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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.