DEBrIEF

How to improve your
learning after a task

DEBrIEF FRAMEWORK

A debrief is a simplified investigation and is an essential tool to understand what worked, why, what we need to improve and how to do this. The 'why' and 'how' questions are the most important but also often the hardest to explore, especially when it comes to what went well. Was it skill, luck, or more likely, a combination of both?

Understanding what 'went wrong' is important because mistakes individuals and organisations make costs them resources including time and money, and likely reputation. No-one comes to work to intentionally sabotage the system, so what conditions lead to unexpected events occurring and not being trapped. The latter is because we need to understand what the effective decisions were within the process, or what communication techniques or routes worked, or what team structure and leadership style were effective, and be able to reproduce them on future tasks.

In both cases, positive or negative, we have a tendency to focus on the outcome and not the process when it comes to assessing how well we did. In both positive and negative cases, it is the learning that is important, not focussing on fixing the errant activity. This is known as the 'fundamental attribution error' – we look at the dispositional (internal) factors rather than the situational (contextual) factors.

> *"The purpose of an investigation is to understand how things usually go right as a basis for explaining how things occasionally go wrong." – Erik Hollnagel*

When there is an adverse outcome, we often focus on blaming individuals for not following their training or doing something 'stupid' as opposed to understanding how it made sense for them to do what they did. A fundamental point to remember is that whatever we perceive to be the truth, it is considered reality for those involved. Consequently, it is very easy to apply hindsight bias to what has happened because we know what the outcome was, yet those at the time didn't have that knowledge.

When looking at a positive outcome, it is easy to rest on our laurels and think we did an awesome job because nothing went wrong. However, unless we can identify what specifically worked, how are we going to be able to reproduce it again? In some cases, the reason why something was successful was that things just fell into place, consider it 'luck'. We can't change how luck falls, but we can certainly influence its direction and be prepared for it when it arrives. For that to happen though, we need to analyse the situation immediately after the event whilst memories are still fresh.

An effective debriefing requires a psychologically safe environment. Research states that psychological safety is the collective belief of how team members and leaders respond when another member "puts themselves on the line", by asking a question, reporting an error, or raising a difficult issue. The team member(s) will internally undertake an assessment weighing up the risk of speaking up against the interpersonal climate versus the longer-term consequences of not speaking up, in effect relating to what happened the last I or someone else spoke up. Was it a positive response or not?

The DEBrIEF framework has been developed for use in relatively small groups of people, originally for divers, but has application in all domains where we want to learn as a team, moving beyond just technical skills but also non-technical skills, the context, and the environment. It is essential that everyone can relate directly to the activities which took place and provide input. If teams are larger than this, the same broad framework can be used but the level of detail might need to be changed when it comes to the 'I' and the second 'E'.
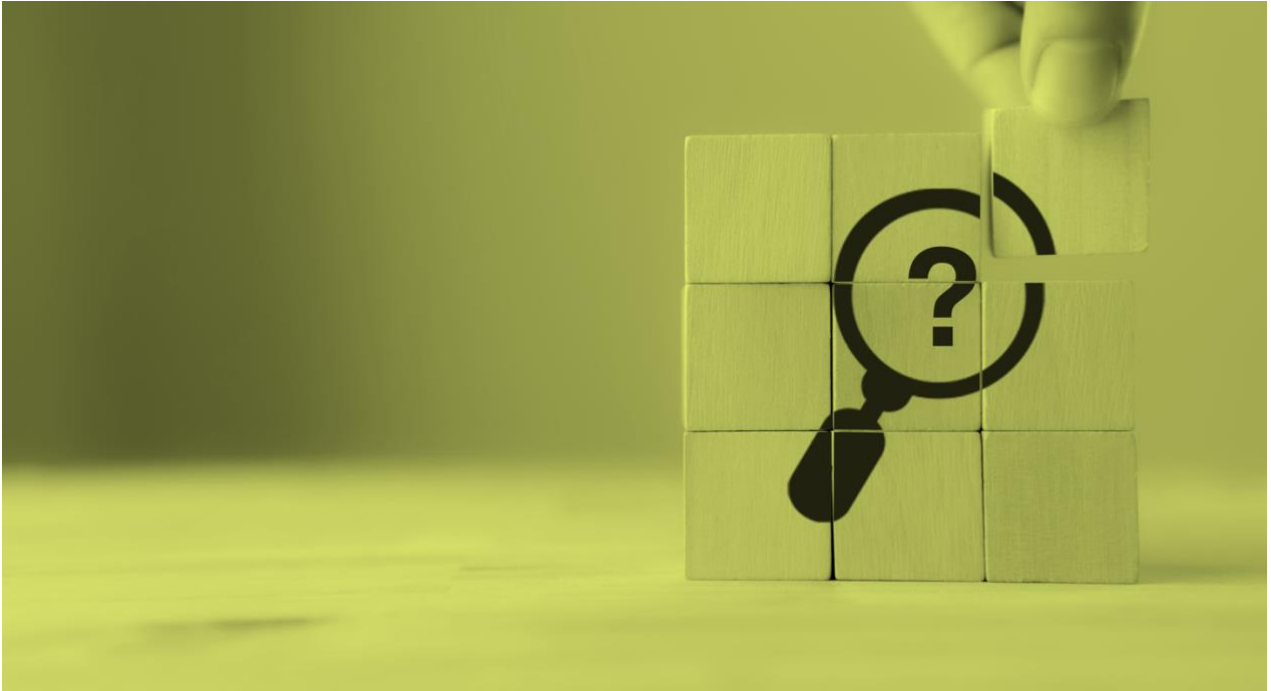
DEBrIEF – D – Define

Define the scope of the debrief and the aims/goals/objectives of the task and did we achieve them?

There are two parts to this definition phase. The first is to define how long the debrief will take – 10 minutes, 30 minutes or 2 hours? This informs the team how succinct they need to be, and consequently how much detail to go into. It also provides a boundary that the team leader can use to provide an imperative to further focus discussions. The second part is that by defining the aims/goals/objectives of the task from the outset, we can ensure the debrief stays in focus. Finally, describing goals and their attainment shows the benefit of having a plan to start with because without a plan or expected output from the task, how do we know we've met it?

DEBrIEF – E – Example

Set an example for learning as the leader. Talk about a mistake or error you made during the plan or the task. It is ok to err.

One of the easiest ways to create a psychologically safe environment is for the leader to show humility and describe a mistake or error that they personally made during the task or activity. Maybe they didn't give enough detail in the project or task brief, or the objective was unachievable despite the team members highlighting this at the outset. Whatever the example, it needs to be meaningful and identify what led to the mistake or error being made. Fundamentally, this action sets the scene to say it is ok to talk about errors and failure and propose in a non-judgemental way of fixing it when the same situation is encountered.
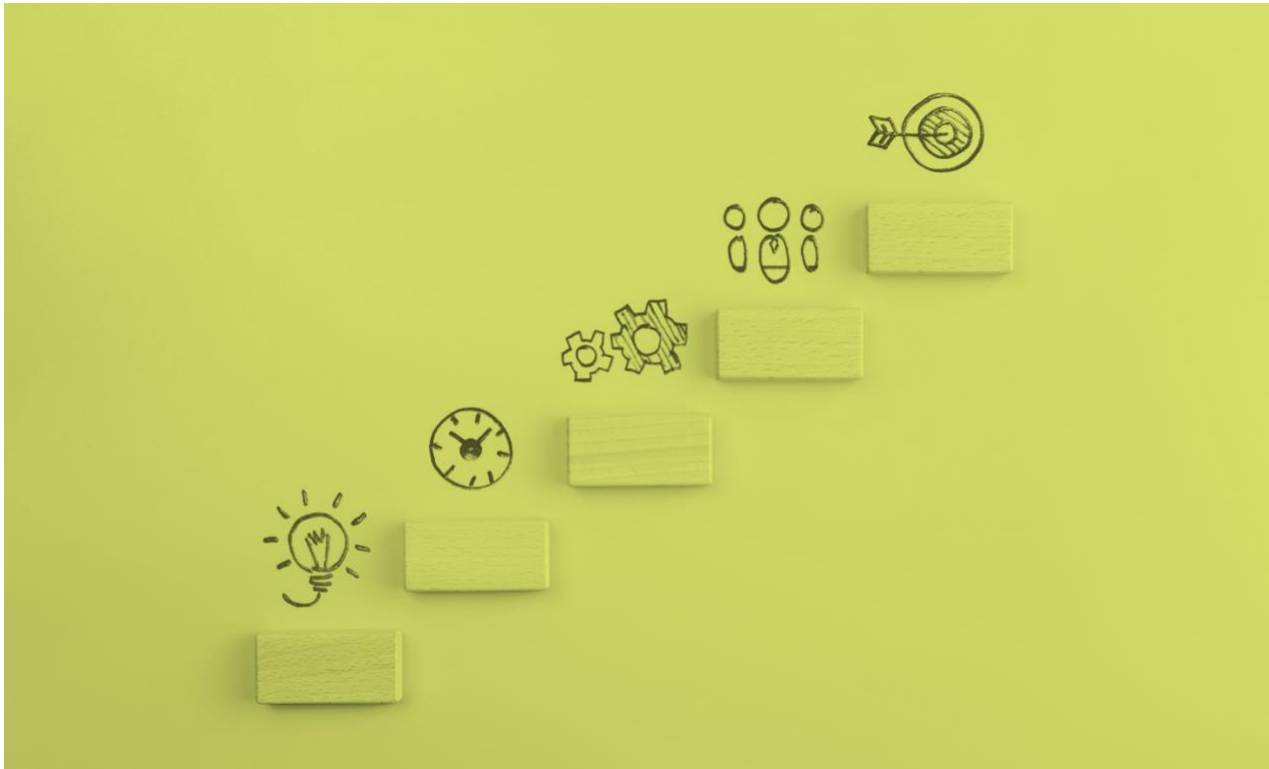
DEBrIEF – B – Basics/Background (Pre-Execution)

The planning and briefing of the task at hand. Were the team set up for success and had the information and resources needed?

This covers the background and administration of the task. Was the timing right? Was the plan clear to all involved? Was there a plan?! Were there dependencies that weren't identified as the task progressed? What about assumptions that went into the plan – had they been validated? In effect, this part of the debrief covers the non-operational aspects of the task and provides the learning for the planning and assumptions part of subsequent tasks. It is easy to encounter counter-factuals at this stage. These are exemplified by words/phrases like "We should have…", "We could have…", "I would have…" or "We failed to…". We need to understand the conditions which led to these outcomes rather that identifying that the actions or events were missing.

DEBrIEF – r – Review Execution

Chronological step-through of the execution against the plan, highlighting key points and milestones.

Review the execution of the task in a chronological manner. It is important to focus on the key highlights so that learning is managed. Depending on those involved and the time available, the level of detail can vary from top-level to the real detail. Don't necessarily pick up the future learning points here rather what happened and why. In a complex system, adverse events are down to interactions or behaviours between different parts of the system that weren't expected. This could be a different team's understanding of what the task was about, how certain equipment was to be used and dependencies or assumptions.

The 'r' in the DEBrIEF model is purposely small because the timeline rarely contributes to the learning of the team.

DEBrIEF – I – Internal Learning

One thing I did well? Why?
One thing I need to improve on? How I will do that.

When it comes to personal and team learning, the process needs to be simple. Therefore, this DEBrIEF model has been developed to focus on one key learning point to reinforce one aspect of good practice and one where improvement is needed. To reinforce good practice, we need to examine the information, processes and actions that surrounded the decisions or communications. To correct behaviour, we need to do a similar activity, but this time we will also look at how to improve on the actions. Just identifying it and saying 'we won't do that again' is not enough! This question and the next are answered by each of the team members in turn, starting with the leader.

Be specific in the points you make. Generalities do not help anyone learn. The team or leader asking for examples is a great way to ensure the points of learning are actually recognised.

DEBrIEF – E – External Learning

One thing we did as a team well. Why?
One thing we need to improve. How we will do that.

The same as above, but this time focusing on the team aspects of the task. Both of these (Internal and External) need to describe the learning points in specifics not generalities. If you describe '*Good communications*' as something that went well, that doesn't help reinforce what specifically worked because we all know that clear, concise and effective communications is a sign of a high-performing team. '*You closed the communications loop by using an open question at the end of the task brief, asking me to describe what I expected to happen next and why.*' is a much better way of describing the 'what worked and why'.

DEBrIEF – F – Follow-up/File/Fix

Reinforce what needs to be done following the debrief. Maybe file an incident / learning report, change a procedure, or fix the broken 'thing'.

Learning rarely happens with what has been discussed in the debrief – it nearly always requires reflection and application afterwards. You cannot reflect in the moment unless you've reflected on the moment. This reflection and subsequent action could be some modification to equipment, a revision to a planning assumption or to post a learning report to your team or team of teams. Given the similarities across the different departments and communities, plus the fact that humans are roughly the same when it comes to decision making, sharing the learning helps more than just those involved in that specific task to improve. However, for this to happen, there needs to be a culture in which teams and leaders look for those 'lessons learned' and understand why it made sense for those involved to operate in the way they did, and not immediately judge them or identify differences to their own operations.

Note, there is a difference between 'lessons learned' and 'lessons identified'. The 'lessons identified' are hypotheses for what might change. You only know the lesson has been learned when you put the plan into action and see its effect. The effect might be that nothing changes. The 'lesson' has been learned, but improvement didn't happen.

SUMMARY

The DEBrIEF framework provides a simple and memorable structure which can be used for simple tasks or much more complicated ones. It looks to build and develop individuals and teams, by focussing on the positive and the improvements possible with a way forward identified, not on the negative aspects of what went wrong and the subsequent natural tendency to blame individuals. For more complex tasks, consider using other tools like Learning Teams and Learning Reviews which provide a scaled opportunity to better understand decision-making. Remember, the sharing of stories and the associated context create the best learning, not boxes being ticked in an incident report form.

Fundamentally a debrief is about learning, not blaming. To learn, we need to understand the stories which were relevant and important to those involved. That relevance is shaped by experience, goals and objectives and the social environment in which we reside. However, to allow those stories to be told honestly and with candour, we need to have a psychologically safe environment where it is okay (or even encouraged) to tell the leaders, managers and peers the bad news and how to potentially fix it. Without such an environment, systemic issues will not be resolved.

This framework can be further enhanced by asking two more questions during the follow-up section.

- *"What was the greatest risk we took and got away with?"* – this will inform and calibrate the risk-taking within the team. If it didn't end up in a failure, why didn't it? What measures were put in place to prevent it, or was it luck?

- *"If we had a bottomless pot of money, what would we do differently?"* – not because there is a bottomless pot available, but because it frees the mind of a restriction and thereby encourages creativity. It is the need to understand what that expensive capability can provide and the discussion that follows looks at how else that same capability can be achieved.

A key trait of a high performing team is the continual development which comes from learning about the system, the people within it, and the poor or good decisions which were made. Such a process is informed by an effective debrief but that debrief requires honesty and strong leadership. A debrief is a tool, but just like any tool, it is only as good as the operator who is using it and for that operator to be effective, they need to practice using the tool.

NOTES:

Human in the system

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