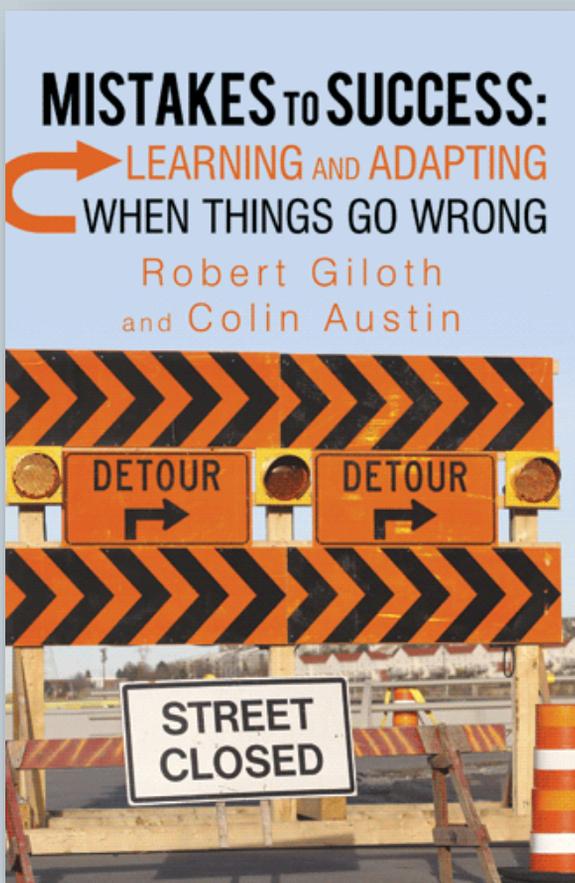


Mistakes to Success Roadmap



**A PRACTICAL GUIDE
TO GET STARTED,
BUILD THE HABIT,
AND CREATE A
CULTURE THAT
TURNS MISTAKES
INTO SUCCESS**

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Since publishing ***Mistakes to Success: Learning and Adapting When Things Go Wrong***, we have been asked to speak to many different audiences. The reason we wrote this book is to encourage people across the field to *learn* from mistakes. In our talks, we have been asked over and over for tools for social sector organizations of different shapes and types and cultures, at different stages in their journey down the road to becoming an organization that can learn from its mistakes.

This is our attempt to give readers a simple set of tools to get started; to build the habit; to build a learning culture. We have tried to describe tools that are as simple to use as possible. Some of these processes would benefit from facilitation: Mistake Potlucks, Peer Assists, Before and After Action Reviews of more complex situations. Where you start and whether or not you do these activities on your own or ask for assistance depends on you.

We hope this Roadmap helps you find your way in this most interesting journey!

-- *Bob Giloth and Colin Austin*

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Getting Started: Some initial thoughts

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Why does it matter if we learn from our mistakes?

Learning from mistakes is not easy. Leading the way can be scary. It can even be risky. But the benefits of learning how to learn from results – good or bad – are huge. It produces more learning. It produces more innovation. It produces better results. Ultimately, it helps the whole field produce better outcomes.

The good news: There *are* ways to reflect on mistakes that make the process less scary and more about learning than about accountability. This “Mistakes to Success Roadmap” will talk you through getting started, building the habit and creating a culture that makes learning from mistakes “just how we do our work.”

In this section, we’ll talk about how to get started looking back at mistakes – how to create a productive space to reflect on mistakes; how to discover and learn about patterns that contribute to mistakes; how to talk about mistakes with your peers.

In the next section, we will talk about how to build the habit by looking forward – how to prepare a team to learn from current work; how to course-correct; how to bring the experience of your peers into your own preparation.

In the last section, we will talk about how to create a culture that supports learning from mistakes in order to create greater success in the future.

Some themes that will repeat themselves:

- The whole point of reflecting on the past is to help us get better results in the future...not to hold anyone accountable for bumps along the road. (P. 4)
- Comparison is a powerful tool: There is only so much you can learn from a single mistake. But comparing several mistakes; comparing mistakes and successes; looking at patterns across several experiences – all of these ways of comparing experience help a team form better, more useful insights. (PP. 4, 5, 10)
- To become a habit, learning activities need to be planned so that they are relevant to real work (“just in time”) and produce more value than the time it takes (“fit for purpose”). (P. 7)



Getting Started:

Ground rules for talking about mistakes

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Mistakes happen for many reasons...especially in complex work in environments that shift as fast as today's headlines. There often is not just one cause for a disappointing result. And most of the time a mistake happens despite the best intentions – for lack of a key piece of information or trying to balance competing goals, or just not having enough time or resources to make it work.

It doesn't matter which words you choose to use: "mistake," "failure," "disappointment," "challenge," or even "do-over." Use a word that is comfortable in your own culture. What *does* matter is how you choose to talk about it, regardless of what you call it.

If you decide to talk about a mistake with people in your organization, set the stage with a set of Ground Rules to make your conversation productive:

GROUND RULES:

- The goal is for us to learn from the past in order to improve the future together...as a *team*.
- Don't listen through our assumptions...ask questions until we understand each other.
- Dig deeper: Keep asking "what caused *that* to happen?" until we find the root cause.
- Look forward. Ask ourselves: "What will we do the same or differently (and why) next time?"

Hint: Try reflecting on one mistake and one success at the same time. What's the same? What's different? Comparing two or more experiences has two benefits: 1) It makes reflecting on mistakes less scary; 2) It helps develop more powerful insights to improve future results. (See p. 5)

Getting Started: Reflecting on Patterns

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In complex work, involving multiple players and shifting environments, it is difficult to learn from a mistake. What looks like a single “mistake” is often the result of a number of smaller mistakes interacting with each other...like billiard balls bouncing off of each other and tapping the Eight Ball into a pocket. And it’s not uncommon for these contributing mistakes to repeat themselves.

Examples:

- Lack of clarity or alignment around our goals
- Faulty assumptions about the situation
- Lack of the right kind of capacity to achieve our goals
- Failing to respond to a change in the situation (an economic downturn; a nonprofit leader suddenly departing, etc.)

Instead of trying to harvest every possible lesson from a single mistake, consider looking at just one contributing factor and learn by comparing it to other situations you’ve faced:

1. Choose one factor that you believe contributed to your result.
2. Look for at least two other situations to compare it to.
3. How did this factor play out in these other situations? What was the same? What was different?
4. What lesson could you take from all of these stories?
5. What programs or initiatives are you working on now that might benefit from this lesson and how could you apply it?



Getting Started: Mistake Potlucks

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When it comes to learning from mistakes, there is safety in numbers!

Hold a “Mistake Potluck” with peers across programs or gather peers from across organizations. The price of admission is bringing a mistake to share.

Prepare to tell the following story:

- **Headline:** *Briefly* describe the “mistake”(2-3 sentences) so that your colleagues have a picture in their head to help them understand your experience. What had you hoped would happen and what were the actual results?
- **Defining Moments:** *Briefly*, describe what significant things happened along the path (decisions you made; actions you took to gain support; interactions you had with stakeholders; etc) that you believe had an impact (positive or negative) on your ability to succeed.
- **Lessons:** What lessons have you taken away from these defining moments?
- **Burning questions:** What questions do you want to talk about with your peers related to this experience?

Keep the storytelling short. Use the Ground Rules (p. 4) to help set the stage for honest sharing. Plan your time together so that at least *half* of your time is devoted to talking about what’s the same; what’s different; what’s surprising across these stories.

Complete your Mistake Potluck by having each participant talk about some piece of work they are currently doing and how they plan to use one thing they heard today to improve their results.

Note: This is a simplified version of an EL Map™. EL refers to Emergent Learning. EL Maps are a tool that can be used to reflect with others within or across organizations on any question, drawing on the experience of the whole group to gain richer insight and develop a plan to test new ideas out in your own work. For more information, see “Growing Knowledge Together: Using Emergent Learning and EL Maps for Better Results” *Reflections-The SoL Journal on Knowledge, Learning, and Change*; Volume 8, 2007.



Building the Habit:

Some initial thoughts

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The biggest challenge for people working in the social sector is finding the *time* to learn. How can you make it relevant and easy to do for busy, mission-driven staffs of foundations and nonprofits?

The answer lies in three key ideas: “just-in-time,” “fit-for-purpose” and “inflection points.”



1 Just-in-time: We learn best when we have something we need to do and we want it to work! Linking learning from mistakes into this need to succeed is a sure way to ensure that lessons get used.

2 Fit-for-purpose: When the benefit gained outweighs the time busy people need to invest to get that benefit, they will make that investment again and again. Weaving learning into doing in a way that is just enough to improve results will go a long way to creating a learning culture.

With these two ideas in mind, some **common mistakes** organizations make:

- Dwelling too much on the past and not remembering that the purpose is to improve the future
- Investing time to reflect on mistakes that have no relation to current work
- Designing big, time-intensive reflection sessions that feel overblown to busy, mission-driven staff

3 Inflection points: Key to weaving learning-from-mistakes into work is to find the inflection points in the work to link it to. An inflection point is real work that will happen – something that is in a team’s calendar around which to build in learning.

Examples: grantmaking decisions, convenings, stakeholder meetings, community events, site visits, board meetings.

In this section, we’ll offer tools to: 1) identify the most important questions your staff wants and needs to learn about; 2) learn around the key inflection points in the work; and 3) learn their way through current work with help from their peers.

Building the Habit: Creating Learning Questions

8

A powerful question teams can ask themselves to set the stage for learning through their work – from both successes and mistakes:

What one thing, if we could really master it this year (or this week!), would make the biggest contribution to achieving our outcomes?

Turn the answer to this question into a Learning Question. Start with either: “What will it take to...?” Or, “How can we...?” Use this question to frame each learning activity.



Learning questions can focus on a problem or an opportunity. Framing them as forward-focused, action-oriented questions reinforces the idea that the whole purpose is to learn how to improve future performance.

This future focus does *not* mean that you should avoid thinking about the past or about barriers you face over and over. It means that these backward-looking questions are just *part* of the inquiry.

A great learning question tends to take on a life of its own after a planned reflection session. It can become a vessel for sharing knowledge over time, across organizations.

Choosing good learning questions

| Don't... | Example |
|---|--|
| Focus exclusively on analyzing the past | “What causes stakeholder inaction?” (A good question, but only part of the conversation.) |
| Embed assumptions | “What will it take to overcome stakeholder inaction that is caused by political influence and lack of skill?” |
| Make questions complex | “How can we keep stakeholders engaged, make room for public debate, and improve the quality of life in our community?” |

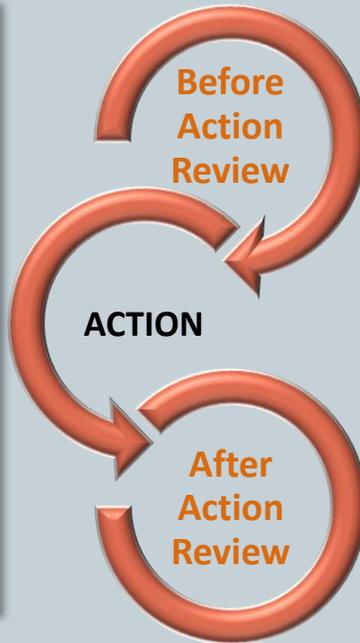
| Do... | Example |
|--|---|
| Focus on the future, avoid assumptions, keep it simple | “How can we best help stakeholders be prepared to take action on this important issue?” |

Building the Habit: Before and After Action Reviews

9

Before Action Review

- What are our intended outcomes and measures?
- What challenges can we anticipate?
- What have we/ others learned from similar situations?
- What will make us successful this time?



After Action Review

- What were our intended outcomes?
- What were our actual results?
- What caused our results?
- What did we learn? And how will we adjust our thinking for next time?

Before and After Action Reviews (BARs and AARs) are designed to weave your learning questions into the important inflection points in your work. We have included a template on the next page to help you organize your BAR and AAR conversations.

BARs and AARs are a simple set of tools for making sure that everyone is on the same page before acting; for discovering the small but important sources of mistakes and correcting course early; for recognizing and capturing small successes.

They are most powerful if done regularly around small, but important, pieces of work – grantmaking decisions, convenings, regular program activities, etc. – related to your learning question.

Remember: keep learning activities “just-in-time” and “fit-for-purpose.” It’s better to do these short “huddles” regularly and see value from them than to try to get everyone together for a long retrospective that happens only once!

NOTE: Another useful “before” tool is the *Premortem*. It is a technique that can be used during planning for a whole project, to anticipate all of the ways in which it might go awry. For more information, see “Performing a Project Premortem,” Gary Klein, *Harvard Business Review*, September, 2007.

Description: (Kind of activity being learned about)

Framing Question: (What will it take to...? How can we...?)

Participants:

BAR Date: *Before Action Review*

What are our intended outcomes?

How will we measure success?

What challenges do we anticipate?

What have we/others learned from similar situations?

What will make us successful this time?

AAR Date: *After Action Review*

What were our intended outcomes?

What were our actual results?

What caused our results?

What did we learn? And how will we adjust our thinking for next time?

Next Time : (Next event to which we can apply what we are learning)

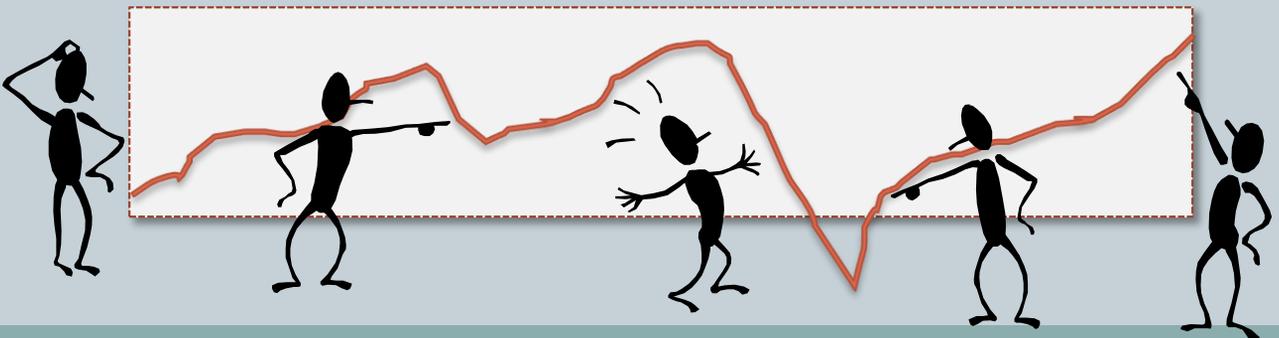
Special notes: (Who we should copy this to; other action items; etc.)

Building the Habit: Peer Assists

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A Peer Assist is like a mash-up of a Mistake Potluck and a Before Action Review. For at least one participant, the story is yet to be told. Peer Assists create a “two-fer”: They help a group share their knowledge around a particular kind of activity (both successes and mistakes) and, in the process, they help one person or team think through the potential potholes and how to avoid or deal with them in advance.

1. Plan to hold a Peer Assist as part of the planning process for a high stakes or innovative program or event.
2. Invite peers inside or across organizations to bring their stories of past work (successes and mistakes) that have something in common with the current program/event. The stories don't have to be exactly the same...remember that patterns (p. 5) tend to repeat themselves. Use the same story-telling format as for Mistake Potlucks (p. 6).
3. Use a timeline, if relevant, to help participants tell their stories, identify defining moments and tease out patterns across situations.
4. Start by asking the “owner” of the current program/event to describe the goals and planning they have completed to date.
5. Ask each participant to briefly share their own experience. Discuss similarities, differences, patterns.
6. Identify a few key lessons that apply to the current program/event and think together about how they could be applied. (IMPORTANT: Don't let this turn into design by committee. Everything that gets offered in this session should be treated as a suggestion that the owner can choose to follow or ignore, as they see fit.)



Creating the Culture: Some initial thoughts

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Creating a culture that learns from mistakes is a chicken-and-egg problem: Do you need trust and candor before you can learn from mistakes, or do you need to start trying to learn from mistakes in order to learn to trust each other and talk candidly?

We advocate for the latter – don't use a lack of trust as an excuse to put off the hard work of learning from mistakes! Just be prepared to go slowly and let candor and trust grow by the way you hold the space for the conversation.



The road may be bumpy. Supervisors may not support open discussion or publishing stories about mistakes. Peers who view themselves in competition may be threatened by the prospect of coming clean about a mistake they feel responsible for. Tensions may surface – different groups may hold different views about who was “responsible” for a mistake (they are probably both right...but only in part).

Another challenge for leaders: Calling yourself a “learning organization” doesn't mean that you are one. Patience and humility and doing the work first makes it more likely that when you finally *do* call yourselves a learning organization, people around you will agree.

In this section, we offer ideas for organizational leaders who want to create a culture that learns from mistakes, and some thoughts about how to talk about or even publish them for the benefit of others.

Creating the Culture: Leading by doing

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Changing an organization's culture is something that happens one step at a time. It requires using each opportunity to reflect in order to go from "N" to "N+1" over and over, until learning from mistakes is "just how we do our work."



Some recommendations for leading by doing:

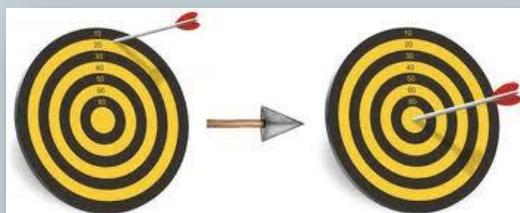
- When reflecting with your staff about a mistake, lead the way early in the conversation by offering how your own decisions or actions may have contributed to the outcome.
- Keep an active Learning Question about your own work and take the time to do BARs and AARs around your own important events (Board meetings, etc.).
- Communicate the message over and over that the reason to reflect on mistakes is so that we can all learn together how to succeed in the future.
- Let natural leaders lead the way. Their early successes will help make it easier for others to follow.
- Don't force candor from people who hesitate. Listen until you really understand and can respect the concerns that cause them to hold back.
- Earn people's trust by holding a safe space for reflecting on mistakes.
- Keep repeating the mantra about weaving learning into work: "just in time" and "fit for purpose." Don't turn "learning" into extra work that doesn't contribute to busy, mission-driven people doing their own work better.
- When you read stories about mistakes published by your peer organizations, bring them to the table to talk about with your own organization. How might this be relevant to our own work? What should we learn from it?

Creating the Culture: A “Mistakes to Success” script

14

How do you talk about mistakes with investors and other important stakeholders?

While many advise owning up to mistakes, we believe that that with important stakeholders, that should be the *first* part of the story.



It’s one thing to be able to show the courage to admit to a mistake. But to be able to go on to say what you think caused it, what you learned from it, and how you are applying what you learned is a demonstration not just of courage but of leadership and the ability to learn.

Here is a script you can use to help you prepare to talk with investors and other important stakeholders about a mistake and what you learned from it:

- **The headline:** [briefly name the lesson you are going to talk about]
- **Our goals and plan:** [describe what you were planning to do and the result you expected]
- **What actually happened:** [describe the actual result you got and how it was different]
- **The defining moments:** [describe what happened and why you think they took you off track]
- **The lessons we took away:** [describe key insights you took away about what it takes to succeed in situations like this]
- **How we have applied or plan to apply these lessons:** [describe what you have changed as a result (and, ideally, how it has changed your results) or when and how – as specifically as you can – you plan to apply the lesson in future work]
- **Our plan to continue to improve:** [describe your plan for when and how to track results and continue to learn (hint: BARs and AARs are a perfect tool for this)]

Creating the Culture: Publishing and reading stories of mistakes

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Several leaders in the social sector have stepped forward to encourage the field to get better at learning from mistakes by publishing their own stories and challenging their peers to do the same.

The challenge of growing knowledge in the field is that the job isn't done when the lesson is told or published. A lesson is truly *learned* when it is considered and applied to current work in a way that improves results...AND continues to improve results in the future. You could think of that as the “weak link” in the lessons learned process.

While it is challenging to publish your own mistakes, it is even less common to see organizations really listen to and apply other people's lessons to their own work. There are two things any organization can do to help grow the knowledge of the whole field.

1. Write for the “customer” of your lessons.

Make it easy for others to see themselves in your story.

Identify your best “customer” for your lessons. Who (what kind of organization, doing what kind of work) would benefit the most from hearing your experience?

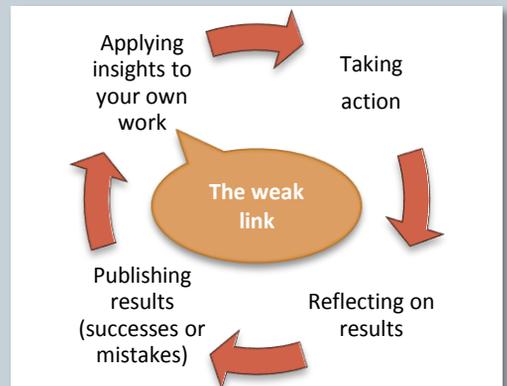
Imagine they could be in the room with you as you write your story. What questions would they probably ask you? Tell your story as if you are having a conversation with them (or, even better, use a real conversation with your peers to help you frame your story before you write it).



2. Be a good “customer” for other people's lessons.

Read beyond the surface of a story about someone else's mistake. Don't allow yourself to write it off because the content is too different from your own work. The content rarely repeats itself. But we all know that patterns repeat themselves over and over across the social sector field. Bring these stories to staff meetings and ask people to reflect on how and when the moral of this story might apply to us.

Growing knowledge across the field



In closing...

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In *Mistakes to Success*, Bob Giloth and Colin Austin aimed to discover some important hypotheses that could guide Community Economic Development practice.

Instead, they discovered that “being successful and avoiding failure is not reducible to a set of unambiguous rules or guidelines.” It takes paying attention, anticipating mistakes, correcting course when possible, and trying to learn in retrospect when it’s not.



In this “Mistakes to Success Roadmap,” we have aimed to give you a way to get started – getting comfortable talking about mistakes, harvesting richer lessons by comparing stories and discovering patterns.

We talked about building the habit by looking forward – creating learning questions to guide your attention, using Before and After Action Reviews to correct course en route, and employing Peer Assists to bring insights into planning.

We offered thoughts about how to create a culture that learns from mistakes, as well as how to support the whole field by publishing your own mistakes and learning from the mistakes of others.

It is our aspiration that the whole field is able to improve its practice through becoming better at recognizing and learning from its mistakes. Improving our collective ability to do this can help us make better investments more consistently. It can help us make a better case for important public policy changes. It can, ultimately, help us raise our capacity to produce the quality of community support and change to which we all aspire.

You can add to our collective story by going to our website and sharing your own stories of mistakes and what you have learned from them: www.mistakestosuccess.org.

-- Bob Giloth, Colin Austin and Marilyn Darling