

Learning Teams

Planning and Discussion Sheet

Prepare > Learn > Soak > Improve > Communicate and Follow Up > Learn Again

Team / topic: _____ Date: _____

Facilitator: _____ Sponsor: _____

1 Prepare the learning

Work and boundaries / trigger (event, change, success, or recurring difficulty):

Learning Question: What important part of this work do we need to understand?

Participants / operational knowledge needed / support for speaking freely:

Before meeting: control immediate risk; explain purpose, use of notes, confidentiality limits, and how concerns will be handled. Decide who attends and who is consulted separately.

2 Learn before solving

Walk us through the last ordinary time you did this work.

What changes with staffing, tools, workload, conditions, or coordination?

What makes it difficult? What do you adjust, and why does that help?

What normally makes the work succeed? How do you know controls work?

When do controls become difficult or unavailable? What happens then?

Who might describe this differently? What are we still unsure about?

Follow the answers; these prompts are not a script. Explore normal work before the event or concern. Park improvement ideas until the work is understood.

3 Capture learning and plan Soak Time

Key insight / disagreement / source and date:

Label notes: observation or documented fact; participant account; inference; open question. Keep differing accounts visible and test explanations that matter.

Question to check / safe observation or record review / owner / due date:

Return session date: _____ Notes / evidence location: _____

Use for proactive learning or after an event. Coordinate with investigation and reporting processes; do not use the session to assign fault or promise absolute confidentiality.

Learning Teams Action and Experiment Tracker

Team / topic: _____ Return session: _____ Review date: _____

Use after learning and Soak Time. Confirm what changed in your understanding; compare options before choosing a trial. Record unresolved questions and keep them open.

Condition / insight Evidence reference	Change to test Why it should help	Owner / authority Due date	Baseline / expected effect Check method and date	Result / side effects Keep, revise, or stop

Effectiveness check: Is the change in place and used? Did it help the work? Did it shift burden or risk elsewhere?

Trial safeguards / resources / approval needed / when to pause or stop:

Close the loop: who needs the result / message and channel / owner / date / feedback contact:

Open questions / next learning cycle: _____

Make extra copies as needed. Refer to your team notes for detailed evidence, decisions, and trial arrangements.