

THE VALUE OF DEBRIEFING

William M.
Duke

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Anyone that has not recognized the necessity for continuous learning in modern business has missed out on one of the most significant lessons learned in recent decades. The forces of rapid global change can render limited professional skill sets obsolete almost overnight. Moreover, organizations that fail to continuously revise their assumptions about their operating environment (i.e. market) will soon face obsolescence or irrelevance. It is more important to develop the capacity to learn from the changing environment than it is to learn from any particular lesson learned. The organization that does not possess formal learning structures to preserve the capacity to learn and preserve knowledge is doomed.

Debriefing provides a powerful and essential structure for maintaining the capacity to learn. When we create lessons learned through the debriefing process, we are generating a form of knowledge called explicit knowledge. In knowledge management theory, there are

two types of knowledge – explicit and tacit. Explicit knowledge, simply, is knowledge that can be written down and/or stored. Tacit knowledge, however, is complex, difficult to codify and, therefore, resides only in the minds of human beings. Tacit knowledge is closely related to the concepts of skill and experience.

Experience is developed over time as individuals struggle with day-to-day challenges. But, experience is also gained through interacting with others in the organization and by observing others. It is through these activities that an organization's culture will either develop through careful cultivation or grow wildly out of control. The process of execution should be a controlled and disciplined one such that the organizational culture reflects positive behaviors.

The Flawless Execution® Model surrounds, of course, execution. Execution at the day-to-day operational or mission level creates a high-density field of interaction, one rich in both explicit and

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tacit knowledge creation and exchange. These interactions are invaluable opportunities to learn from each other. Amy C. Edmondson, Novartis Professor of Leadership and Management at Harvard Business School, points out that success in the new ‘knowledge economy’ requires a focus upon ‘execution-as-learning.’ For Edmondson, there are four approaches to create such a focus; (1) use the best knowledge obtainable; (2) enable employees to collaborate; (3) routinely capture process data; and (4) study the data to find ways to improve. As a whole, the Flawless Execution model strongly supports all of these approaches. But, of its four fundamental component processes, only debriefing directly addresses all four.

Debriefing directly links cause and effect for every individual involved in a project or task and, therefore, vastly increases learning and experience. Moreover, when

lessons learned are made available to the whole organization through web-accessed databases, the proclivity to seclude learning within ‘stovepipes’ and ‘silos’ may be averted. As some practitioners of knowledge management have indicated “. . . there is a tendency for knowledge to align itself with organizational constructs. When this is the case, learning is likely to occur in parallel – in ignorance of what another part of the organization is doing.” Connecting these parallel learning ‘silos’ is one of the objectives of sharing lessons learned.

So, what are the benefits of proper debriefing? They are numerous and fall into two categories. First, there are the discreet, tangible products that emerge directly from the debrief process. Then there are the leadership, cultural, and intangible benefits that arise from the consistent practice of debriefing.

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The Tangible Benefits of Debriefing

First, debriefing formally concludes a task or project. One hears the phrase “closing the loop” often today. And, although it’s obvious and simple, don’t underestimate the significance of seeking closure on a task or project. Debriefing is a satisfying and productive means of ‘closing the loop.’ It allows us to confront what has or has not been accomplished and move on.

There is a growing consensus among modern business leaders that making mistakes is an inevitable part of the inherent risks in any undertaking. In fact, many leaders recognize that making mistakes is an essential part of learning and growing. In a complex world where complete predictability is impossible and innovation and the acceptance of some level of risk are necessary to survive and thrive, mistakes can be seen as not only acceptable, but welcome. There is a healthy level of errors that is an indication that the people that make up an organization are sincerely putting forth the effort to succeed. One successful CEO

states “The greatest mistake is to make no mistakes.” Jeremy Gutsche, author of *Exploiting Chaos*, goes further by suggesting that organizations should celebrate failure in order to ‘liberate innovation.’

But, failure is a strong word. Mistakes and errors do not necessarily lead to failures. Failures occur when mistakes or errors are left uncorrected. Although failure may be inevitable in some circumstances, one should be careful to celebrate it. Outright failure is rarely acceptable, even when it is inevitable regardless of the effort taken to avoid it.

The objective of debriefing is to root out the mistakes and errors and stop them from recurring. Debriefing can prevent failure. Errors that emerge from incorrect assumptions help us revise those assumptions. But, errors that occur in spite of valid assumptions and proper planning must be addressed at a fundamental root cause level with both candor and sensitivity.

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Regardless, debriefing provides an appropriate means of putting the past behind us, learning and growing from it, and moving on. And, when debriefing is performed regularly, it keeps the organization focused on the present and the future rather than the past. It helps to continually revise our assumptions about the market, economy and world.

Furthermore, proper debriefing fulfills a critical need for effective learning by connecting cause and effect rather than allowing time delays to inhibit or prevent meaningful learning. How often do members of an organization have the opportunity to contribute to a large project or planning effort and, then, have no connection to its progress or ultimate success (or failure) until months or even years later? How can individuals relate their efforts and the efforts of others to the final analysis after so long a period? Humans have a deep psychological need

to accomplish something, to see things through. Debriefing, particularly when it is used regularly and over short time frames, helps us fulfill this need.

Second, and closely tied to debriefing as a ‘closing the loop’ ritual, is its capacity to wrap up tasks and projects as a change management practice. The foremost authority on change management, John Kotter, laid out an 8-step process of leading change. His sixth step in that process is to ‘create short term wins.’ The creation of such ‘wins’ presupposes an incremental process of planning in which tasks or projects are planned for and executed in relatively short periods of time. Such is the approach of the Flawless Execution planning methodology. One cannot celebrate wins frequently if one does not have a short-term approach to planning at the tactical level. Long-range planning is, of course, important. But,

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plans must be broken down into smaller, shorter-range plans. Only then can one celebrate the wins in order to maintain the inertia of change initiatives. Debriefing gives us that regular, short-term ability to celebrate those wins in a meaningful way. Celebrating a win is more than breaking out the champagne. Celebration includes understanding what you won and how you won it – and then replicating the success.

Third, a rigorous debriefing process seeks root causes of those wins or losses. It is not enough to simply ask why something succeeded or failed. Often there are deeply imbedded forces at work beneath the surface. Simply looking for the obvious causes, the ‘how’s,’ do not uncover the real forces, the ‘why’s.’ Furthermore, those harmful root causes can fester and grow to infect the organization if left unaddressed. Correspondingly, beneficial root causes can die from neglect if not identified and nurtured. Debriefing provides an opportunity to sort through the ambiguities in our complex systems and improve at the core organizational level.

Fourth, once root causes are identified, an actionable and specific lesson learned is developed. Lessons learned require action to be taken and assign a single individual as responsible for implementing it. A lesson learned may require a change or amendment to existing processes, procedures, standards, rules or regulations. It may require further development of a plan or program to address the root cause. Or, it may simply be a list of steps for others to utilize in future tasks and plans. Since a lesson learned is written in an explicit manner, it can be stored and made available for others in the future. Or, it may be promulgated to everyone within the organization via some appropriate medium.

Finally, debriefing, via the development of lessons learned, provides a rapid and simple approach to process improvement. Since debriefs occur frequently, seek root causes, and produce actionable lessons

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learned, those lessons learned can address process improvements without the unnecessary and slow tedium of methods like Six Sigma. But, debriefing can uncover just the sort of issues where more involved methods like Six Sigma need to be used to dig into and sort out all the data. Debriefing, particularly for its analysis and identification of root causes, can act as a targeting process to identify areas for more data-intensive investigations like Six Sigma.

Cultural and Leadership Benefits of Debriefing

As indicated, the implementation of frequent and organization-wide debriefing is the first step to changing and improving the overall organizational culture. It is an exercise that, like rigorous physical exercise, improves our wellbeing in many ways. So, first and foremost, the benefit of debriefing is its positive impact upon organizational culture.

Edgar Schein, perhaps the most respected scholar on organizational culture, states that “culture is the result of

a complex group learning process.” It is difficult to overstate the role of debriefing as just such a ‘group learning process.’ Debriefing is the sacred art of learning. It is the forum in which we learn from ourselves and each other –for good or ill. To take charge of that process, ritualize it, and develop it, is to take control of your organizational culture. As Schein has warned, if leaders don’t manage their cultures, their cultures will manage them.

The kind of culture that debriefing helps develop is one of learning, openness and honesty. The thorough and candid nature of proper debriefing exposes the truth. Of course, that truth should remain respectful. But make no mistake, debriefing requires an honesty that can be ego-bruising. Once one gets past that truth-telling hurdle though, one finds that such honesty and openness is contagious and spreads to daily behaviors. People stop talking behind each other’s back and actively seek out each other’s advice and opinions. Such is the positive culture shift that debriefing can affect.

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Debriefing can also positively support the development of better leaders and more cohesive teams. Debriefing must be led, it doesn't just happen when you put people together in a room. The success of the debrief is incumbent upon the leader. Debriefing aids leaders in establishing greater trust between themselves and their team.

One of the critical skills identified in the past few years as lacking in modern business is leadership. Leadership is a skill that is enormously complex and cannot be reduced entirely to explicit forms of knowledge. Leadership must be observed and practiced in order to be mastered - if anyone ever truly masters the art of leadership. The important point, though, is that leadership can be learned. Debriefing provides an opportunity for leadership to be practiced, displayed, and observed. When we allow more junior members to take the lead in planning and debriefing, we provide extraordinary opportunities for developing leaders and

allowing more senior leaders to take such opportunities to mentor those with less experience.

More and more, succession planning is becoming recognized as central to organizational success. It is no longer common to see an individual hire in to a company at an early age and stay with that same company until their retirement. We have an increasingly mobile workforce and companies have high turnover rates. Explicit and tacit knowledge sources are continually walking out the door. Debriefing helps record and communicate explicit knowledge, accelerate learning among less-experienced personnel, and develop better leadership practices throughout the entire organization.

The openness and honesty of a proper debrief also builds greater trust between team members because of the openness and honesty demanded of all involved. When a team thoroughly discusses each other's contribution to the execution of a

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task or project they come to know each other and understand each other's unique challenges and obstacles. Furthermore, they uncover the complexities that challenge them and learn how better to assist each other in managing those challenges.

In addition to improving leaders and teams, debriefing provides insights for organization-wide improvements. Although debriefing begins at the very tactical or day-to-day operational level, the practice of debriefing should cascade upward in the organization. The root causes that are discovered at each level, even when those causes may be ambiguous, can be cross-referenced for recurring root causes. For an organization as a whole, the analysis of recurring root causes is the most powerful continuous improvement tool it may possess. Such analysis provides a capacity to identify or self-diagnose a host of organizational weaknesses.

Finally, debriefing is a central component to developing the culture of a High-Performing Organization. Scholars and researchers have closely studied why some complex organizations in high-risk environments have operated with very few accidents over many years. These organizations have been labeled High-Reliability Organizations (HRO's). Karl Weick and Kathleen Sutcliffe published their findings in 2007 in "Managing the Unexpected." In it, the authors note that high-risk operations like air traffic control operations, aircraft carriers, and nuclear power plants display these characteristics. For example, aircraft carrier flight operations demonstrate slightly less than 3 fatalities per 100,000 flight hours in an extremely hostile, unforgiving, and constantly-changing environment. Overall, Weick and Sutcliffe have coined the term mindfulness to describe 5 characteristics of most HRO's. Of those five characteristics, three are directly supported by debriefing practices. According to Weick and Sutcliffe:

THE RED TEAM

STREAMLINING COLLABORATION IN TASK SATURATED TEAMS

1 HRO's appear to be preoccupied with failure of all sizes and shapes. They do not dismiss small deviations or settle on narrow, localized explanations of these problems. They treat each small failure as a potential indication of a much larger problem. For HRO's, "the only problem is a hidden one." Root cause analysis within proper debriefing processes and techniques seeks out those recurring root causes in order for the organization to address them.

2 HRO's exhibit a reluctance to simplify interpretations. HRO's recognize that humans tend to oversimplify the world and try to resist that tendency. They look for odd things that don't seem to fit their picture of how things usually work. They build diverse teams and welcome a wide variety of perspectives to challenge conventional wisdom. The S.T.E.A.L.T.H. DebriefSM process encourages an environment for participants to be unsatisfied with simple answers. Furthermore, it allows the participants to raise their concerns in a psychologically safe environment where their opinion is valued.

3 HRO's demonstrate a commitment to resilience. They recognize that no hazardous and complex system will be error free. They recognize that mistakes happen, but are not typically due to negligence or malfeasance. For HRO's, mistakes often suggest systemic problems. The S.T.E.A.L.T.H. Debrief process creates a forum where participants can accept failures and learn from them in a positive, non-attributive manner while relentlessly seeking root causes and systemic issues.

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A Final Word on Learning

The events of the past few years have seen the decline and fall of many businesses large and small. The economic earthquake of 2008 exposed the learning gaps within organizations - gaps that, for many, became fatal wounds. Business guru and author Jim Collins reviewed the root causes behind many of these failures. To contrast those failures he enumerated a list of eight behaviors demonstrated by organizations on their way to greatness. Of those, the seventh is 'blameless autopsies' or debriefs. And, the eighth is the ability to accept full responsibility and learn from mistakes.

As a learning tool, debriefing is essential. We live in a world of rapid and often violent change that we have no real capacity to predict. What we learn today, may save us tomorrow, but become irrelevant next week. Knowledge of the real world is perishable. It takes ritualistic debriefing to keep it fresh and up to date.

Those organizations that hold debriefing as a "sacred" part of their culture will stand a far better chance of surviving and thriving in a complex and uncertain world.

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