



SAFETY EXCELLENCE

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# OPERATIONAL LEARNING



## WHAT IS HOP?

1

### PEOPLE MAKE MISTAKES.

*Destigmatizing failure improves innovation.*

2

### BLAME FIXES NOTHING.

*Failure is hidden as a result of fear.*

3

### LEARNING AND IMPROVING IS VITAL.

*The people doing the work are the experts.*

4

### CONTEXT DRIVES BEHAVIOR.

*We must be deliberate about learning and improving.*

5

### RESPONSE MATTERS.

*Our reaction creates or hinders a learning environment.*

These principles are the foundation of “operational learning,” a cycle we use at WestRock to better understand the context and conditions of the tasks our team members perform.

## WHAT IS OPERATIONAL LEARNING?

- **Operational learning** is used to understand the work from the perspective of the worker—the context and conditions of the tasks they perform.
- We use **operational learning** to understand these conditions and where they either did or didn't allow our workers to fail safely.
- We leverage our workers as experts and problem solvers because they know the conditions of these systems the best.

### Session 1: Learning Mode (approx. 1 hour)

- Ask questions of our workers as problem solvers that best know the system.

Soak/Reflection Time

### Session 2: Discovery Mode (approx. 1 hour)

- Review the information from session 1 and define problems while developing problem statements.

Soak/Reflection Time

### Session 3: Problem Solving Mode (approx. 1 hour)

- Brainstorm areas and actions for improvement.

These sessions will lead to telling the story of the workers and work being performed.





## OPERATIONAL LEARNING

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- Operational learning uses a specific cycle to gain a better understanding of unsafe events or successes that may occur on the job.
  - It is different than traditional incident investigation.





## WHAT IS A LEARNING TEAM?

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- Not a traditional investigation
- Not worried about collusion
- Not focused on the “one true story”
- Not focused on the one root cause
- Not focused on blame
- Tells the story of how work normally gets done
- Tells the story of complexity
- Tells the story of normal variability and coupling
- Tells how the conditions lead to this type of event if an event brought the learning team together



## WHO IS ON A LEARNING TEAM?

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- Coach or facilitator (and co-facilitator)
- Small enough to manage but large enough to capture the context (i.e., 5 – 7ish)
- Those close to the event or issue
  - But also, possibly someone from outside the process
- Support members, as needed
- Leadership to sponsor it and kick it off



## WHEN IS A LEARNING TEAM USED?

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- Not for everything
- Based on severity or potential severity
- For post-event injury
- When there is a near miss
- For stop work
- For interesting successes to uncover best practices
- For high-risk tasks
- When there are challenging design problems

A learning team is not used for punishment or criminal behavior.



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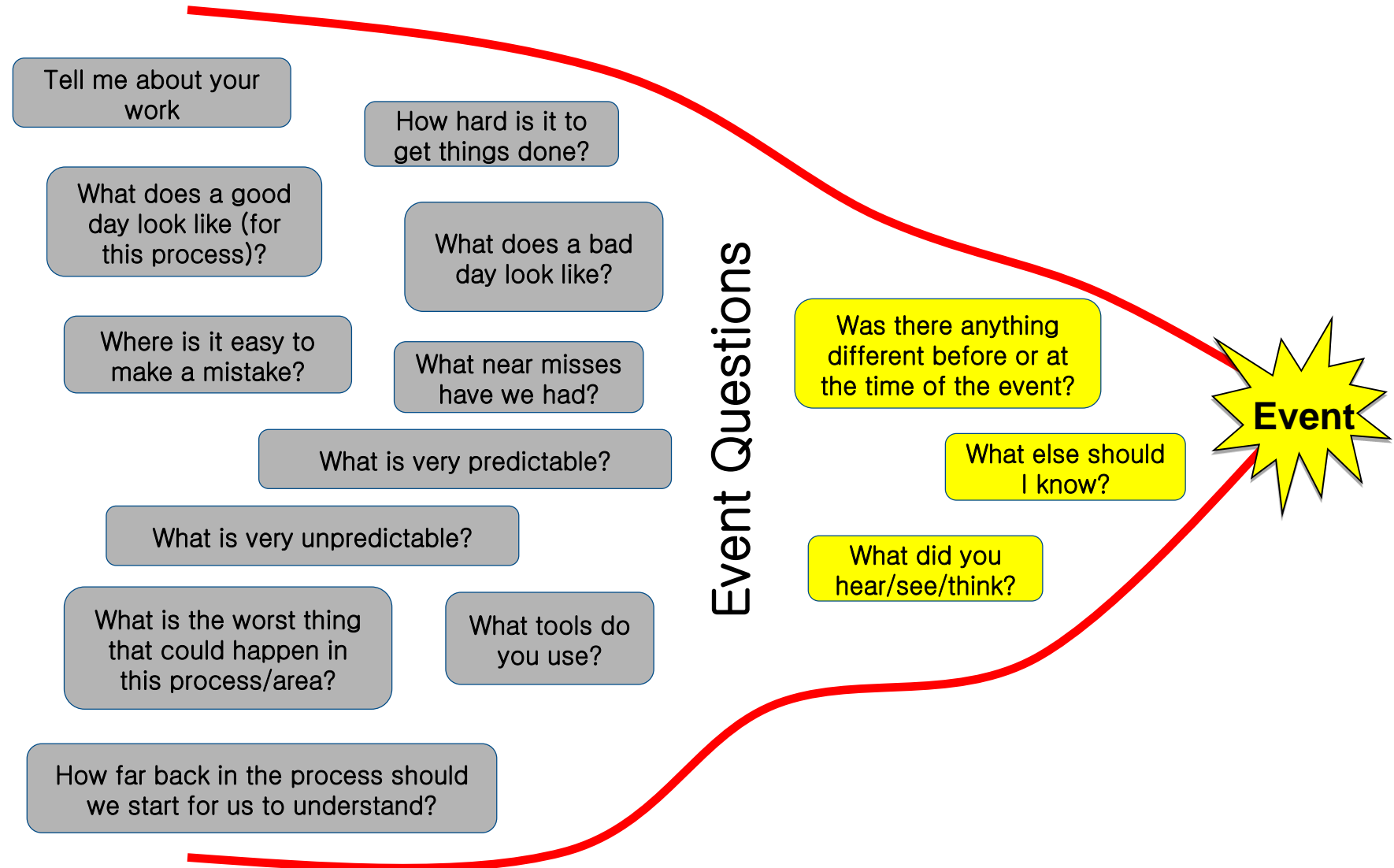
# SESSION #1: LEARNING MODE





## SESSION 1

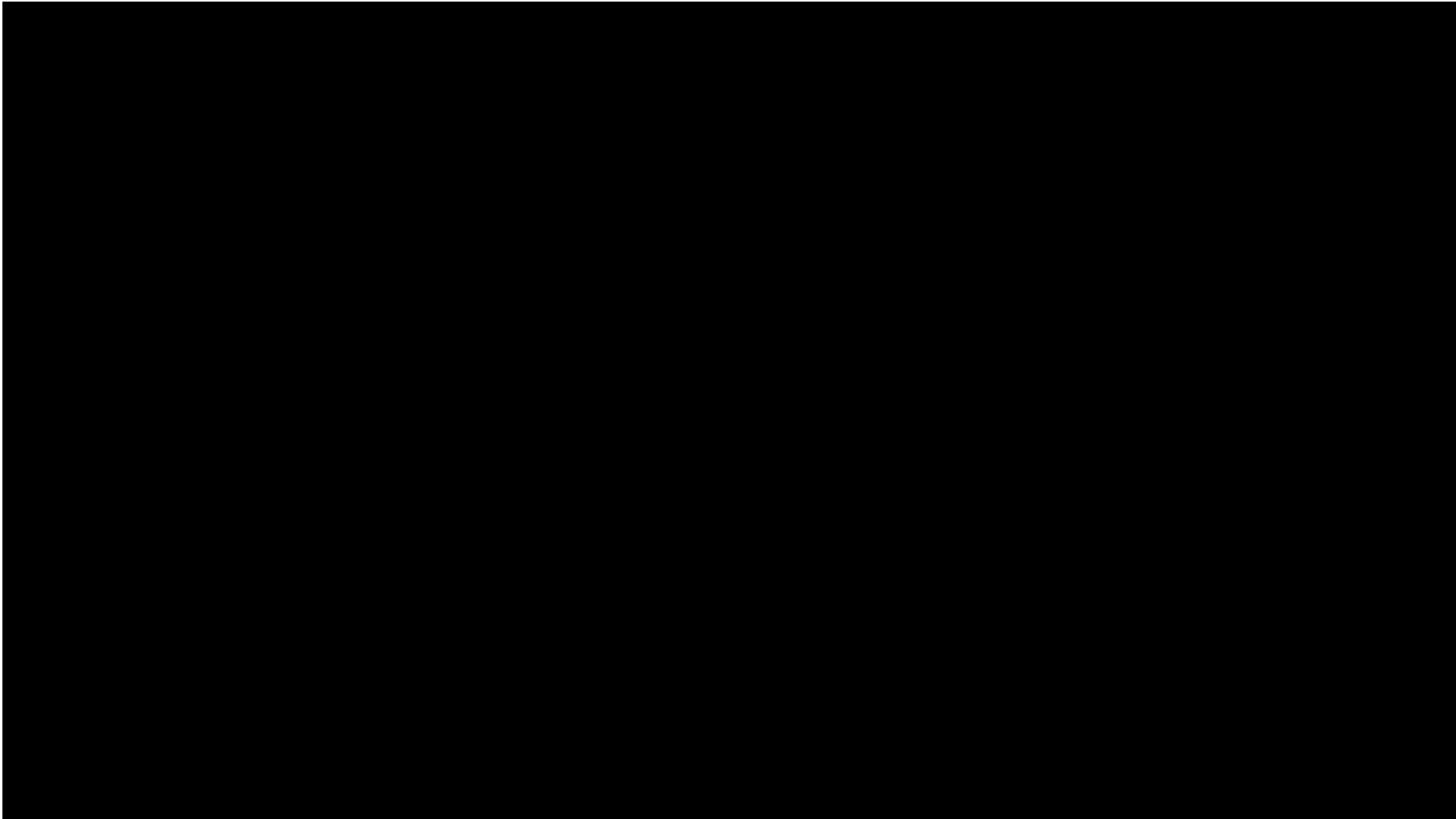
# TYPES OF QUESTIONS



# ACTIVITY

WHAT QUESTIONS WOULD YOU ASK?

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## SESSION 1

### REMEMBER!

- Focus on the “how” and conditions of the event.
- Beware of counter-factual statements—what didn’t or should have happened.
- Don’t jump to solutions—remain in learning mode.

#### Session 1: Learning Mode (approx. 1 hour)

- Ask questions of our workers as problem solvers that best know the system.

Soak/Reflection Time

#### Session 2: Discovery Mode (approx. 1 hour)

- Review the information from session 1 and define problems while developing problem statements.

Soak/Reflection Time

#### Session 3: Problem Solving Mode (approx. 1 hour)

- Brainstorm areas and actions for improvement.

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# SESSION #2: DISCOVERY MODE

## SESSION 2

- Review prior session and “ask what else?”
- Continue in learning mode with a deeper understanding of discovery.
- Evaluate current defenses (good, bad, broken).
- Continue to build the “wall of discovery.”
- Document the problem statements.
- Address all conditions which must exist in order for the event to occur, with the problem statements.
- Resist the urge to fix.

### Session 1: Learning Mode (approx.1 hour)

- Ask questions of our workers as problems solvers that best know the system.

Soak/Reflection Time

### Session 2: Discovery Mode (approx.1 hour)

- Review the information from session 1 and define problems while developing problem statements.

Soak/Reflection Time

### Session 3: Problem Solving Mode (approx. 1 hour)

- Brainstorm areas and actions for improvement.

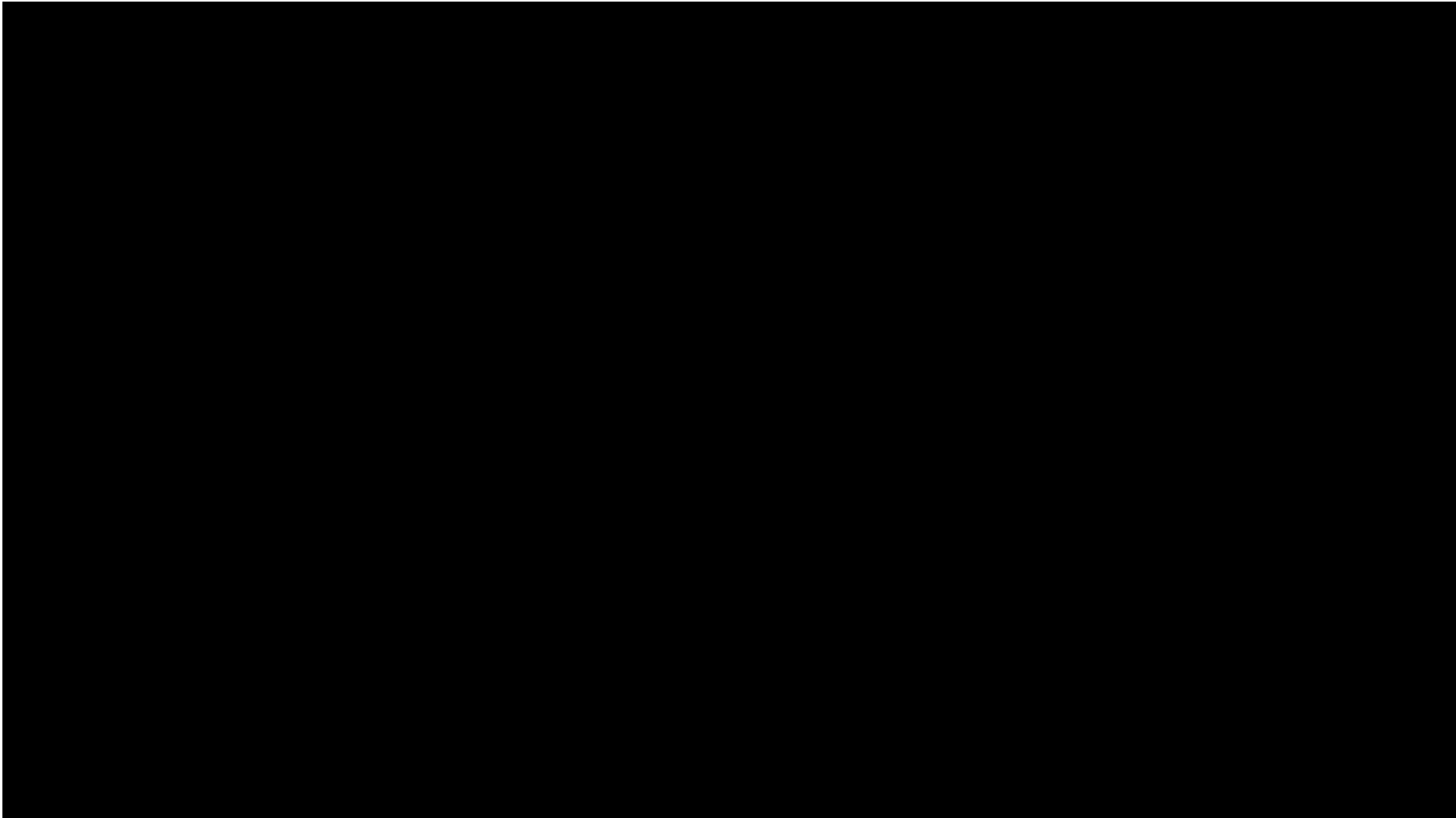
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# ACTIVITY

IDENTIFY THREE PROBLEM STATEMENTS

# WHAT QUESTIONS WOULD YOU ASK?







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# SESSION #3: PROBLEM SOLVING MODE

# ACTIVITY

IDENTIFY THREE SOLUTIONS

## SESSION 3

### REMEMBER!

- Map solution sets to problem statements.
- Use high level controls in the hierarchy of controls for the most effective solutions
- Layer defenses using the hierarchy of controls
- Team-owned solutions are best!

#### Session 1: Learning Mode (approx.1 hour)

- Ask questions of our workers as problems solvers that best know the system.

Soak/Reflection Time

#### Session 2: Discovery Mode (approx.1 hour)

- Review the information from session 1 and define problems while developing problem statements.

Soak/Reflection Time

#### Session 3: Problem Solving Mode (approx. 1 hour)

- Brainstorm areas and actions for improvement.

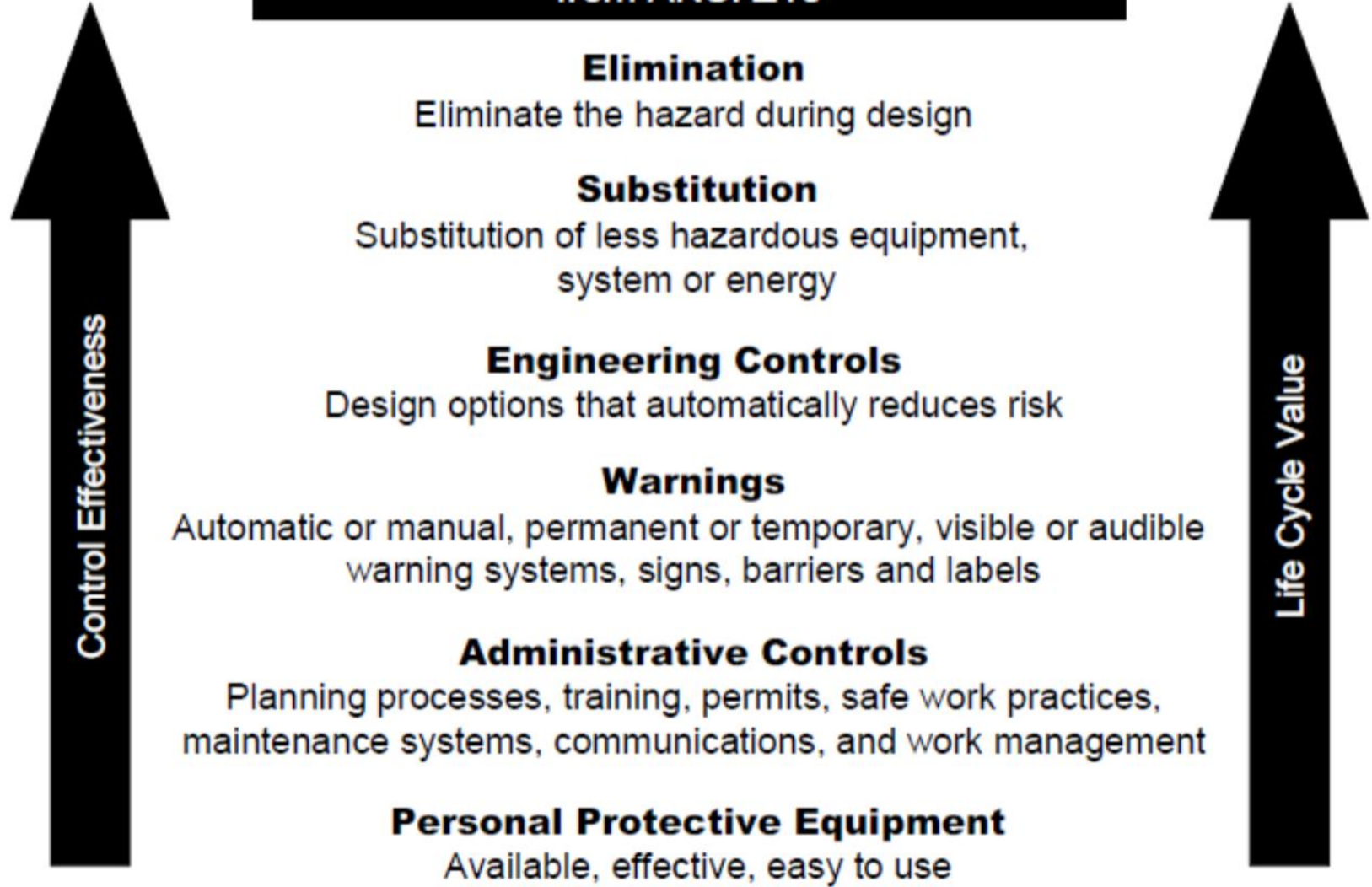
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#### OPERATIONAL LEARNINGS



## LAYER DEFENSES

# Hierarchy of Hazard Control Measures from ANSI Z10





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# QUESTION AND ANSWER

