

Facilitation Tip 17: Don't Let Space or Tools Limit Your Investigation

There are many ways to document your incident. As far as software goes, we lean toward the Cause Mapping® investigation template in Microsoft Excel for both onsite and remote facilitations, but sticky notes on a dry erase board or chart paper can be used effectively too. Regardless of which documentation tools you use, don't let the available space limit the team from adding the necessary detail. A straight line 5-Why Cause Map™ diagram easily fits on one page. As the analysis expands, you'll need space for more causes. Below, we've listed some pros and cons of utilizing the three most common ways to document cause-and-effect diagrams.

Facilitation Tip 17

Click here to learn more about how to expand your investigation regardless of space or tool restrictions.



(4 minutes)

Microsoft Excel

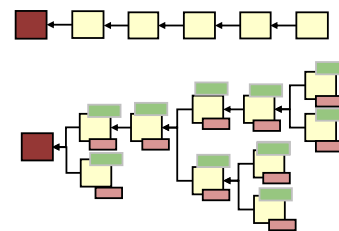
Microsoft Excel provides nearly an unlimited amount of space to create a *Cause Map* diagram. With that in mind, you'll be able to build it as large as you want and need to thoroughly explain the incident. You can manipulate the map on the worksheet using the Select Object cursor so that you have sufficient space to expand branches as needed. And by becoming proficient with the zoom commands, you can navigate the team to the appropriate area(s) of the Cause Map diagram.

PROS:

- The template stores a complete investigation in one file.
- Each piece of the investigation is organized as its own worksheet.
- Can communicate file to any using Excel.
- Can create a PDF for those who don't use Excel.
- Easy to edit.
- Legible, electronic record of the entire investigation.
- Easy to zoom in to focus on a specific area of the investigation.
- Easy to update, iterate based on new findings.
- Can customize presentation in the same file depending on the audience.
- No proprietary software license for special problem solving software.
- It utilizes a software that is already on their PC rather than purchasing additional tools or software.

CON(S):

- Using Excel Drawing Tools requires people to learn to use the software in a different way.



Sticky Notes

- Using Chart Paper

If you aren't comfortable in Excel, don't let the tool hinder the process or be a distraction to the meetings. Use paper. I recommend giving everyone some sticky notes to document causes. A lot of my clients will build their Maps with the team, then take the paper back to their desk to document it in Excel. This allows them to practice their Excel skills while not slowing progress of the team during the meeting(s).

- Using White Boards

Similar to chart paper, you can utilize a dry erase board as your canvas, writing directly on the white board or you can using sticky notes on the board. The notes allow you to avoid rewriting causes, since you can move them around. It's also much easier to keep up with the arrows on a dry erase board. Start with a clean white board, and if you run out of space, take a moment to pause and capture what you have (take a picture, set aside, save) and create more space for the team to work. You can also tape chart paper next the dry erase board to extend the Map.



PROS:

- Connectors can easily be drawn by hand.
- Can tape up more chart paper as needed.
- Easy and quick to get started.
- Everyone can easily write or contribute causes.

CONS:

- May be difficult to read handwriting.
- May require additional work to convert electronically.
- Common to only capture the cause-and-effect relationships and not the supporting information tools.
- Sticky notes will fall down after a period of time.
- Can be difficult to follow because arrows are usually drawn in at the end of the exercise (on chart paper).

LESSON: Never let the documentation tool or the available room limit your investigations. Use a tool that you are comfortable with that will not hinder the team and ensure the team is set up with enough space to sufficiently explore and expand any branches of the *Cause Map* diagram as information is revealed.

To learn more about the *Cause Mapping* method of root cause analysis and how to better facilitate an investigation, consider one of our online training options at www.thinkreliability.com/events.

To learn more, visit our website at www.thinkreliability.com
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