

THE ANATOMY OF A PERFECT EXECUTIVE SUMMARY FOR AN RCA

You've investigated an incident, and now it's time to write up your report. This report should document what you've found, and the corrective actions needed to prevent recurrence or mitigate the problem to an acceptable level.

Clear Summary

At the heart of a good report is a strong, clear executive summary.

What does an executive summary look like? Is it a dot point affair? Is it a few one-liners that capture the critical elements of the issue? Or do you tell a story that recreates everything? Is it something in-between?



Flexibility

One size does not fit all

Particularly given that different companies have different needs and policies – there are some golden rules that can be applied in crafting the perfect executive summary.

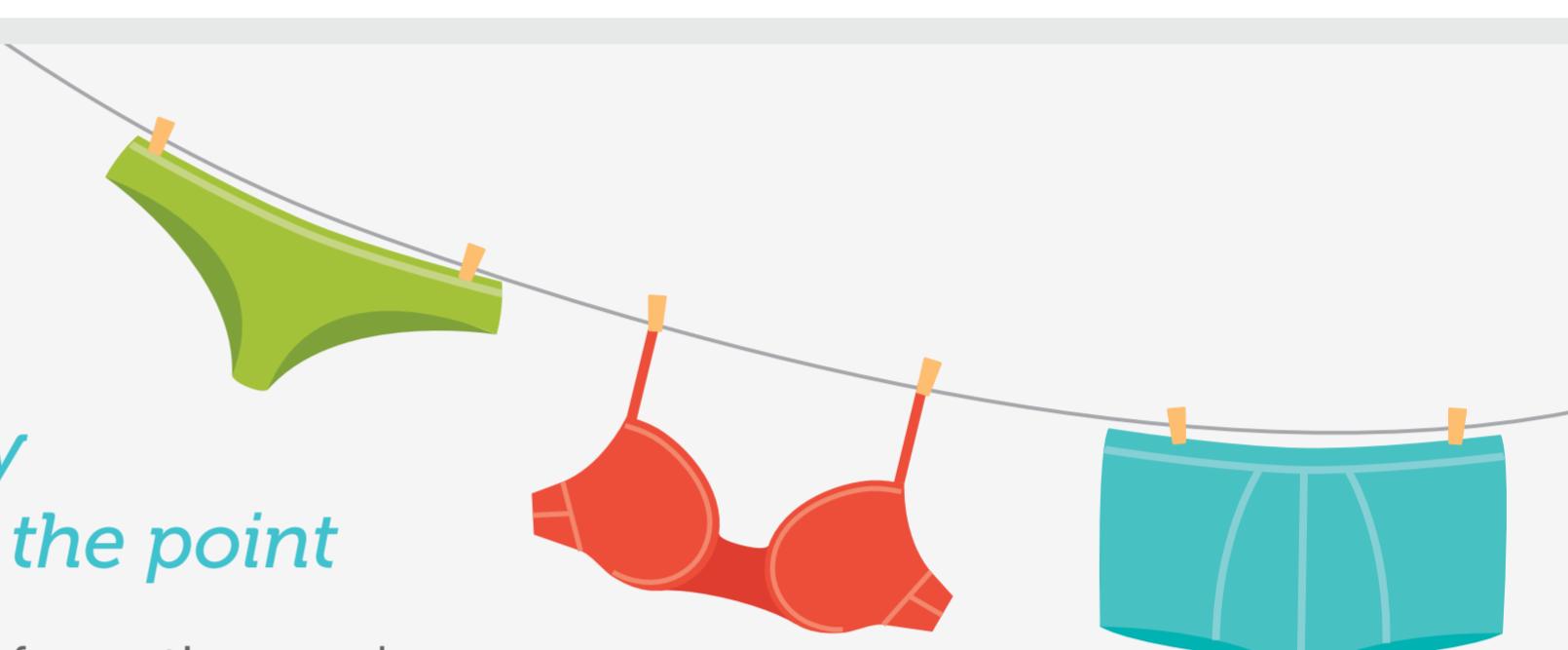
Be brief

An executive summary should be brief and to the point

Yet it must still convey critical information, such as:

- The cause and effect paths identified in the investigation
- Lessons about the causal relationships culminating in the incident
- Rationale behind why certain corrective actions have been recommended

It should only take a few minutes to read. For a manager whose time is precious – and hence will likely not read the full report – the executive summary is their insight into the full investigation.



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Simple Facts

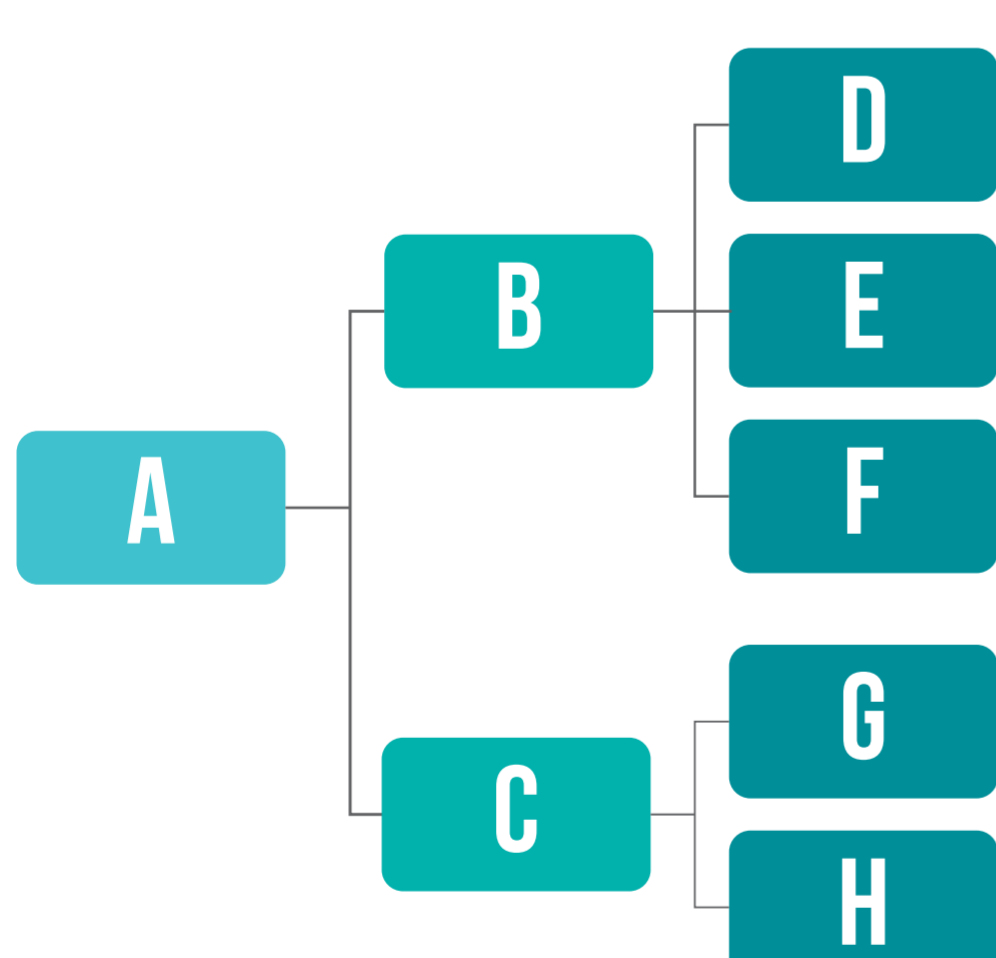
An executive summary should be factual, yet written for easy reading.

Everyone should be able to understand it, so avoid words that confuse people. Stick to clear, simple language that is easily read and interpreted.

Be Specific

Avoid ambiguity and generic language.

This may lead to alternate interpretations of the information. For example, citing “mechanical failure” could refer to any or all mechanical failures. A root cause analysis targets a very specific failure – a seized motor, for instance – which has very specific causes.



Cause & Effect

Use “caused by” language.

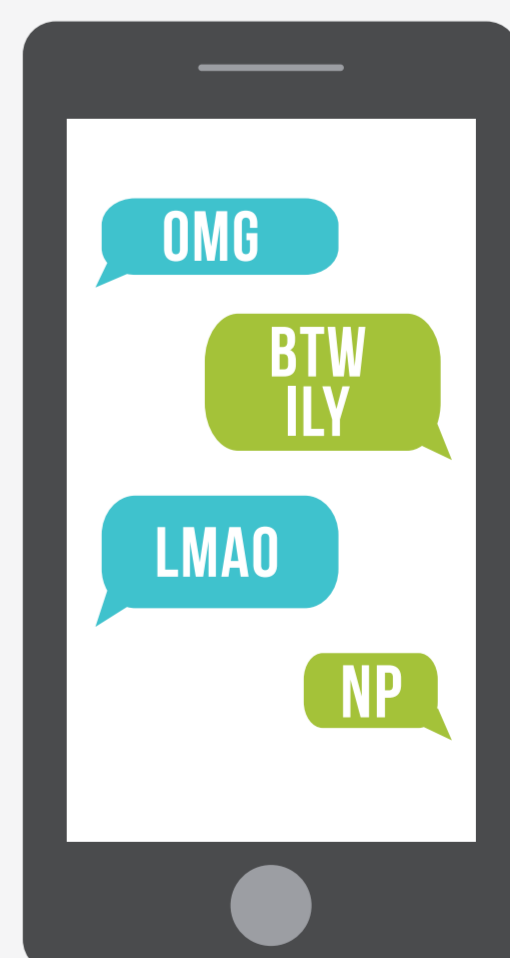
With reference to the cause and effect chart you created during the investigation, use “caused by” language to join the causes together. So A was caused by B and C; B is caused by D, E and F; and C was caused by G and H (where the letters represent the causes depicted in the chart).

Language

Avoid technical jargon.

Don't fall into the trap of assuming that everyone will be able to follow your technical or task-specific jargon. Likewise with abbreviations or acronyms. Try to avoid this type of language.

Instead, write the report for a non-technical audience. This will make it easier for a broader readership to interpret and make sense of it, and reduce the number of questions you field once the report is published.



Summary

What did you learn today?

By following the advice above, you will find that an executive summary is quick and easy to read – and doesn't take long to write, either. Be aware that every organization's needs are different, and yours may have specific rules around what an executive summary should contain. If you have no template to follow, then use the advice above to craft the perfect executive summary for your investigation.