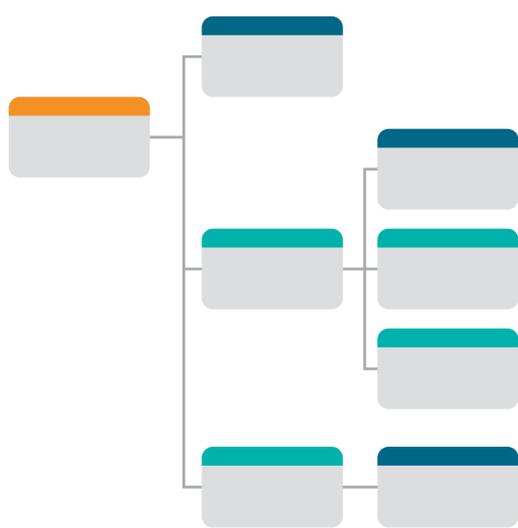


PRACTICAL TIPS:

Preparing to Lead an RCA Investigation

A facilitator plays a crucial role in conducting an investigation. Use these practical tips to make sure you are set up for success when following the Apollo Root Cause Analysis methodology.

STEP 1



Familiarize

Familiarize yourself with the Apollo Root Cause Analysis methodology.

Ensure you are familiar with the method – after all, it's what you're trying to facilitate.

STEP 2

Supplies

Gather your supplies.

Stock up on sticky notes. Many facilitators find it most effective to use sticky notes to perform the analysis as these help participants gain a common reality.

Get multiple colors so you can easily distinguish between the changes to the chart created on different days or at different times.

If the walls are unsuitable for sticky notes, tape poster paper to the wall first and then adhere your sticky notes. Using paper can provide the extra advantage of making the chart easy to remove and take with you.

If it's sensitive subject matter, you can roll it up and take it with you at the end of the day.



STEP 3



Time

Prepare the participants.

An RCA can require a significant time commitment, so make it clear from the outset how much time is needed from the participants.

STEP 4

Information

Gather information.

The more information you have at the outset, the smoother the journey.

You may already have information at hand in the form of pictures, emails, reports, write-ups, witness statements, and so on.

Request evidence from the right people, collect it and store in the one file.

You may also choose to take the entire team to see the area under investigation, so that everyone has a clear picture in mind about what you're discussing.

