

Situation Appraisal

Identify Concerns

List threats and opportunities

*What problems, or deviations, are occurring?
What decisions need to be made?
What plans should be implemented?
What changes are anticipated?
What opportunities exist?
What bothers us about...?*

Separate and clarify concerns

*What do we mean by...?
What exactly is...?
What else concerns us about...?
What evidence do we have...?
What different actions, activities, changes, problems or decisions are part of this concern?*

Set Priority

Seriousness? Urgency? Growth?

*Which concern should we work on first?
What is the current impact on people, safety, cost, productivity, customers, reputation?
Which concern is most serious?
What is the deadline? When do we need to start?
When would resolution become difficult, expensive, or impossible?
Which concern will be hardest to resolve later?
What will be the future impact?
What evidence is there that the seriousness will change?
Which concern is getting worse quicker?*

Plan Next Steps

Determine analysis needed

*Do we need further clarification?
Do we have a problem with a deviation from expectations (e.g.: quality, or timeliness) for which cause is unknown? And, do we need to know the cause to take effective action?
Do we need to make a decision? Make a choice?
What action(s) need to be taken? Do we need to develop a plan for implementation?
Do we have an action or plan to protect (or enhance)?*

Plan Involvement

Determine help needed

*What needs to be done and when?
Who needs to be involved for...
Information? Approval?
Analysis? Implementation?
Creativity? Development?
Commitment?
Who will document our process and results?*