

Cause Mapping II – Facilitation & Documentation Workshop

Audience: This two-day workshop is intended for people that have attended a one or two-day Cause Mapping I – Effective Root Cause Analysis workshop and want to improve their ability to facilitate and document an investigation.

Objective: Apply and master Cause Mapping facilitation and documentation skills through hand-on application and group exercises.

Prerequisites: Previously attended a Cause Mapping – Effective Root Cause Analysis Workshop, either client or public venue

Setting: PC Lab or with laptops

1. Review the Cause Mapping Approach

- Review how process and cause-and-effect apply to every type of investigation
- Review the 3 basic steps for analyzing and solving a problem, as outlined in the Cause Mapping I workshop:
 - Outline – Define a problem within the context of the organization's goals
 - Analysis – Build a Cause Map for a specific problem
 - Collect sufficient evidence
 - Complete a thorough analysis
 - Solutions – Identify effective solutions to prevent the problem from occurring.

2. Comprehensive Problem Investigation Skills

- Facilitation – The effective facilitation of an investigation consists of collecting and organizing information from the field, leading a structured and coherent investigation meeting and providing clear documentation.
- Documentation – Document any incident in a simple, coherent format.

3. Attendee's Cause Maps Reviewed

- All attendees are expected to submit a prepared Cause Map at least one week prior to the workshop. The purpose of this pre-work is to allow attendees to talk about their experience in building the Cause Map – identify successes, failures, frustrations. Our hope is to educate through experience.

4. Group Exercises with Role Playing

- The class will be broken up into groups of 3 – 4 individuals. Each person in the group will be given different information about a problem and will take turns facilitating the problem by mapping information from the other individuals. Attendees are encouraged to bring example problems with them as they may be used for some of the exercises (more information on what to bring will be provided by email once you register).

5. Microsoft Excel Training and Exercise

- Attendees will be given a blank project template in Microsoft Excel and asked to build different versions of a Cause Map by adding evidence, inserting photos, updating the versions, and crossing out boxes when new evidence comes to light.
- The Excel shortcuts and tips will be covered in depth with hands-on practice.