

Adaptive Capacity Labs

MISSION CONTROL CENTER

Incident Analysis Training & Coaching

Project Description

Meaningful learning from incidents is only possible if the incidents are well understood.

After-incident review ("post-mortem") meetings are often frustrated by complexity and hobbled by production pressure. This makes understanding harder and limits the potential for learning. Better preparation for and conduct of post-mortem meetings can make these review meetings more effective and efficient, setting up the path for meaningful learning from incidents.

Incident analysis and post-mortem meeting facilitation are skills that can be learned.

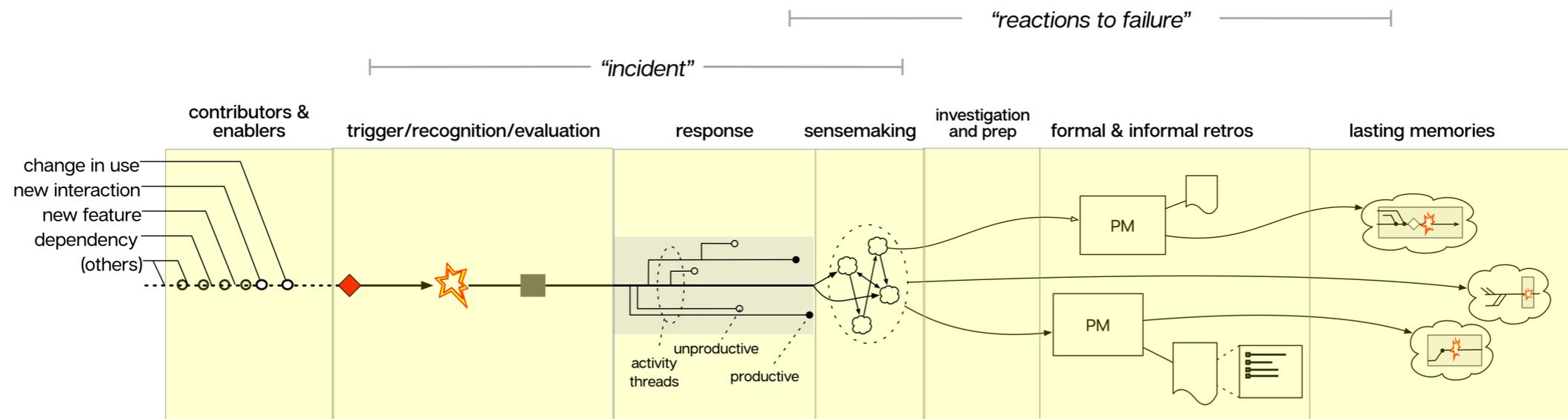
Creating a cadre of experts with these skills and processes around post-incident activities sets the stage for improved learning from incidents.

These experts will become adept at:

- Building a coherent, detailed description of the event as it unfolded;
- Identifying the systemic factors that produced the event and shaped the response;
- Recognizing novel aspects of the incident and response that reveal systems behavior and the expertise of incident responders;
- Preparing presentation materials that show these in a context that encourages both exploration and productive discussion by others;
- Facilitating the exploration and discussion in a group setting; and
- Producing a succinct record that synthesizes the data, analyses, and insights produced.

This project combines the workshops and coaching of participants in **incident analysis** and post-incident debriefing facilitation.

The approach is highly interactive and entails periods of high intensity work. It includes both group work involving all participants and intense work with participant pairs.



Incidents in modern software-driven businesses present opportunities that are much greater than is typically recognized.

Developing effective countermeasures, preventative designs, and other improvements require understanding an incident in deeper ways than simply when it occurred, how long it lasted, and what the customer impact was.

This deeper understanding comes from reconstructing the event(s) in the context they were in, exploring the multiple perspectives of those who are responsible for responding to the incident and those defending the organization from these types of events, and connecting them in ways that *have lasting influence on the business*.

“Learning from failure” does not come from filling out a template and plotting shallow data on a chart. It means developing and maintaining the expertise to know *how* to analyze incidents deeply, identify *which* elements of the event are most valuable and which are not, and synthesizing this in ways that provide the greatest insight for the broadest audience possible.

Most importantly, it means doing this analyses *efficiently*, because businesses cannot wait for a dissertation to be published every time an outage happens.

We will train you to do this.

Typical Goals, Objectives, and Deliverables

Goals of the Incident Analysis Training and Coaching project are:

- To improve the quality and efficiency of your organization's learning from incidents
- To enhance, enrich, and amplify *what* your organization learns from incidents
- To better share within your organization the insights generated and lessons learned from incidents

Objectives of the project are:

- To establish a cadre with demonstrated capacity to do efficient incident analysis and post-mortem facilitation;
- To demonstrate that high-quality incident analysis and skilled facilitation can fuel post-incident learning;
- To generate momentum for the practice of incident analysis and post-mortem meeting facilitation.

Deliverables of the project are:

- Initial focused training (workshop sessions with interactive exercises);
- Coaching participants during analysis and post-mortem facilitation of your organization incidents as they arise;
- Participant-generated summaries of analysis and post-mortem facilitation experience
- Summary document including list of opportunities for further process improvement

Formal workshops kick-off and conclude the project

In between, participants work through the analysis and post-incident debriefing facilitation of incidents under the guidance of ACL principals. The close, individual attention will produce a high intensity *learning-by-doing* experience.

The project includes opportunities for participants to critique their performance, share their experiences, leverage learning from past incidents, and develop and refine tools for investigation and analysis.

Detailed objectives include participants' ability to:

1. collect, collate, and evaluate incident data
2. identify critical intra-incident decisions, actions, and junctures
3. develop and test incident narratives
4. debrief participants
5. create useful process traces
6. extract and characterize key incident themes
7. find, compare, and contrast related incidents
8. prepare post-mortem presentation materials
9. facilitate post-mortem meetings
10. capture and summarize post-mortem content
11. revise and refine post-mortem documents
12. summarize post-mortem findings