

Situation Appraisal Glossary

Clarify Restating a concern to better understand the action needed for resolution.

Concern Feeling a need to do something. A concern is typically a problem to be resolved, a decision to be made, an action or plan to be protected, or an action or plan to be leveraged.

Confirm and Record Data A Set Priority procedure in which facts to support the prioritization of concerns are collected.

Create Action Statements The Identify Concerns action step that lists statements indicating the type of action to be taken.

Current Impact One of the three factors that can be used to set priority, the other two being future impact and time frame. Actual impact up until this moment on people, safety, cost, customers, productivity, reputation, or any other related criteria.

Decision Statement A short statement that describes what is to be decided or recommended. It consists of a “choice” word; a result; and one or two modifiers. For example, Select a new printer to buy.

Determine Help Needed The Plan Involvement action step that assigns responsibility and schedules next steps for completing the resolution of a concern.

Determine Resolution Approach The Plan Next Steps action step that identifies the steps needed to complete the resolution of a concern.

Deviation A performance gap between the Should and the Actual. Deviations may be positive or negative, desirable or undesirable (defect).

Future Impact One of the three factors that can be used to set priority, the other two being current impact and time frame. Anticipated impact from this moment forward, if left unresolved.

Identify Concerns The first process step in Situation Appraisal. It consists of four action steps: Identify the theme; List concerns; Separate and clarify concerns; and Create action statements.

Identify the Theme The Identify Concerns action step that defines the scope of the concerns to be addressed.

KT Clear Thinking Process A necessary sequence of steps by which information and judgments are organized so that a conclusion can be reached and appropriate action taken.

List Concerns The Identify Concerns action step in which concerns that exist within the situation's theme are listed.

Mechanics of Priority Setting A Set Priority procedure in which rigor is added to the priority setting process.

Object The thing (or group of things) that has (or may have) a problem.

Plan Involvement The fourth process step that creates an action plan for resolving the concern. It consists of one action step: Determine help needed.

Plan Next Steps The third process step that determines which Kepner-Tregoe analytic process or action and how much of it to apply to resolve a concern. It consists of one action step: Determine resolution approach.

Problem Statement A short statement that describes what has the problem and what is wrong with it. Problem statements are written in an object and deviation format. For example, The printer is not working.

Process A systematic set of steps to meet a goal.

Potential Opportunity Statement A short statement that describes the action or plan to be leveraged. It consists of the action and end result and could include time and cost. For example, Continue operations during the systems upgrade next week.

Potential Problem Statement A short statement that describes the action or plan to be protected. It consists of the action and end result and could include time and cost. For example, Complete the information technology-related hardware refresh project by next month.

Separate Dividing a complex concern into one or more single concerns to work on one at a time.

Separate and Clarify Concerns The Identify Concerns action step that examines concerns and restates any that are unclear.

Set Priority The second process step in Situation Appraisal. Establishing the order in which to address the concerns. It consists of one action step: Use knowledge and experience (if priority is clear) OR consider current impact, future impact, and time frame (if priority is unclear).

Situation In Rational Process, the factors that create a concern (i.e., that create the felt need to act).

Situation Appraisal A rational process for systematically planning the resolution of concerns. It consists of four process steps: Identify Concerns, Set Priority, Plan Next Steps, and Plan Involvement.

Time Frame One of the three factors that can be used to set priority, the other two being current impact and future impact. The deadline (clock and calendar time) after which it will become difficult, expensive, impossible, or meaningless to resolve the concern.

Use Current Impact, Future Impact, and Time Frame The Set Priority action step in which the priority order for resolution of concerns is established based on evidence and logic.

Use Knowledge and Experience The Set Priority action step that identifies the order in which concerns will be resolved.