# SITUATION APPRAISAL



Clear thinking for complex situations

## REFERENCE



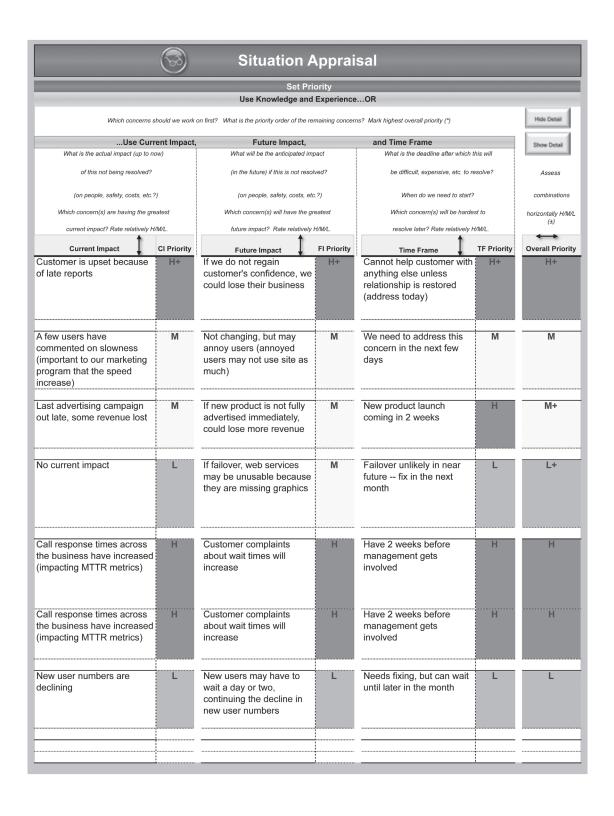
### **Situation Appraisal**

#### Situation Appraisal Example \_

There are a number of problems at one of your biggest customers, Big Bank. You have been asked to go on-site and obtain a full understanding of the problems. Specifically, there has been a recent unexplained database crash and the customer requires your company get to the root cause of the incident. The crash delayed the reporting of year-end results.

KT Kepner Tregoe	Situation A		?
	Identify Co	ncerns	
Identify the Theme	Separate and Clar	ify Concerns	Create Action Statements
What are the primary areas of concern? What is the theme for this Situation What boundaries will help focus our attention and resources?	<u>Separate</u> Is there more than one issue in this concern?	<u>Clarify</u>	Does each separated and clarified concern indicate the action needed to resolve it?
Big Bank's database problems	What's the evidence? What else concerns us about?	What exactly do we mean by?	Is the action about a deviation, a choice, a threat, or an opportunity?
List Concerns  What deviations are occuring? What decisions need to be made?	Can this concern be resolved by a single analysis or action?	What exactly is?	
What plans should be implemented? What changes are anticipated?  What threats exist? What opportunities exist?	What's the evidence?		Do we simply need to get something done?
Concerns	Separated and Clar	ified Concerns	Action Statements
Bank reported year-end results late	Result of crash was a seriou end; customer is losing confi operation		Find the cause of the crash
Browser performance slow	One e-commerce page takes 2 minutes to load		Understand e-commerce page loading issue
Spooler queue too slow at spooling advertisements from veb marketing division	Can't get new advertisements published to the server fast enough		Find out why the new advertisement cannot be published to the server fast enough
Back-up mirror site may not be able to update graphics files ast enough in the event of a failover	If there's a failover, the standby site does not have a fast enough link to download graphics		Recommend an approach for getting sufficient speed between sites
Jsers have to change working practices as a result of performance issues	Application is running at 50%	o of expected speed	How can we reduce the impact of the applicatio running at reduced speed?
			Find the cause of the application running at reduced speed
Alay not be able to add users and new graphics to the ystem	While failed over, the configuration cannot be changed		Understand how to add new users during failovers

#### Reference



### **Situation Appraisal**

Situation Appraisal					
	Plan Next Steps	Plan Involvement			
	Determine Resolution Approach	Determine Hel	p Needed		
Wh	at steps or actions are required to resolve this concern?				
Is the action about a choice, a deviation, a threat,		Who needs to do what and by when?			
	an opportunity or something that just needs to be done?	Who needs to be	involved for:		
		* Superior Solution? * Creativity:	? * Information?		
	What analytic process (and how much) is needed?	* Approval? * Structur	e? * Analysis?		
	what analytic process (and now much) is needed?				
		* Development? * Support	? * Consensus?		
	What follow-on actions are needed? What else?	* Commitment? * Implem	entation? * Goal Agreement?		
cess Needed	Next Steps (What)	Who	By When		
PA	Gather data for a full and accurate description of	Customer representatives	Within the next six hours		
	the problem	Technical support experts			
	Complete a problem specification	Resolution facilitator			
	Identify and test likely causes				
SA	Separate and clarify the concern	Account team	Next few days		
	Work out what action to take to address the	Customer			
	concern				
PA	Gather data for a full and accurate description of	Account team	Next 2-3 days		
	the problem	Customer	Nom 2 o dayo		
	Complete a problem specification				
DA	Write a decision statement and objectives	Customer	Within a month		
	Get signoff from stakeholders on the objectives				
	Gather data for alternatives and evaluate				
	Assess risks				
PPA	Identify what could go wrong and their likely	Customer	Within a day or 2		
	causes				
	Take preventive actions to eliminate the causes				
	Plan contingent actions to reduce the impact				
	Outhor data for a fill and		N-40 days		
PA	Gather data for a full and accurate description of	Account team	Next 2 days		
	the problem  Complete a problem specification	Customer			
	Somplete a problem specification				
SA	Identify concerns and separate and clarify	Account team	Within a month		
	Identify actions to resolve concerns	Customer	am a monu		
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