5 Whys Cheat Sheet

Step 1: Deal with the fallout immediately

> ***Why:*** *If your reputation or customer happiness is on the line, you want to rectify the situation as quickly as possible.*

- ❏ Set up a task team.
- ❏ Contact affected parties.

Step 2: Set up a 5 Whys session with your team within 24 hours

> ***Why:*** *All the affected team members need to share their involvement in the sequence of events and memories need to be fresh.*

- ❏ Choose a facilitator who was not directly involved in the ‘big mistake’.
- ❏ Ask all affected team members to prep their notes on the timeline of events before the session.
- ❏ Get together in a room with a whiteboard.

Step 3: Identify the main ‘big mistake’ up

> ***Why:*** *There is likely a series of mistakes leading up to the ‘big mistake’ and everyone needs to agree on what the ‘big systematic failure’ actually is.*

- ❏ Draft a one-sentence description of the actual ‘big mistake’ that:
    - ❏ Includes the ‘Who?’, ‘What?’ and ‘When?’.
    - ❏ Is a one-folded problem.
    - ❏ Will lead to the core problem when ‘Why?’ is asked five times.
- ❏ Draft more than one statement if needed. The next step will help you choose the best one.

Step 4: Put together a sequence of events

> ***Why:*** *This will highlight any gaps in the system and help to go down the path of the 5 Whys later.*

- ❏ Write up a timeline of events that led to the ‘big mistake’ on the whiteboard.
- ❏ Ask about:

    - ❏ **Sequence:** What was the process? Who was involved, where and when?
    - ❏ **Ownership:** Who was going to do what?
    - ❏ **Expectations:** What did each stakeholder expect?
    - ❏ **Feedback and awareness:** How did team members get feedback on their decisions during the process?
    - ❏ **Social dynamic:** What social factors were at play during decision-making? For example: Was someone late or tired?
- ❏ Take a photo of the timeline before moving on to the next step.
- ❏ Revisit the ‘big mistake’ statement to make sure it is accurate.

Step 5: Starting with the main problem, ask ‘Why?’ five times

> ***Why:*** *Each time you ask ‘Why?’, you reach a more fundamental problem that needs to be tackled.*

- ❏ Draw the 5 Whys table on the whiteboard.
- ❏ Fill in the initial ‘big mistake’ statement on the top and in the top left cell.
- ❏ Ask ‘Why?’ at least five times to get to the root cause of the ‘big mistake’.
- ❏ Stop when asking ‘Why?’ no longer produces useful answers.

Why did...	Because...	Solution
1. <Insert here>		
2. <Insert here>		
3. <Insert here>		
4. <Insert here>		
5. <Insert here>		

Step 6: Identify solutions to each problem

> ***Why:*** *While the 5 Whys identifies the root cause of the ‘big mistake’, each problem was big enough to cause a system failure, so you want to tackle each of them.*

- ❏ Look for a solution to directly address each problem.
- ❏ Ensure that solutions address actual systems, processes, and tools.
- ❏ Assign a team member or team to implement each solution.

Step 7: Schedule a follow-up check-in

> ***Why:*** *Teams need to be accountable for the solutions so that they are actually put into practice.*

- ❏ Facilitator writes up the notes on the 5 Whys using the template.
- ❏ Schedule a meeting within two weeks to check in on solution progress.
- ❏ Share write up of the 5 Whys with other teams.