

# SITUATION APPRAISAL PROBLEM ANALYSIS

## PREWORK



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## Kepner-Tregoe Situation Appraisal and Problem Analysis Prework

### Introduction

The purpose of this pre-workshop information is to prepare you to attend the *KT Situation Appraisal and Problem Analysis* workshop. It includes workshop objectives, a description of the learning process, and instructions on how to prepare for the workshop.

### What You Will Learn

The workshop is designed to build your critical thinking capabilities for:

- Solving problems;
- Asking questions to support related data gathering; and
- Handling complex issues.

### How You Will Learn

The workshop is based on a proven, systematic learning design that consists of the following:

- Exercises structured to help you examine your current concern resolution skills.
- Concept briefings and discussions about the steps in the process.
- Concept practice using scenarios, with instructor feedback.
- Concept application on work-related concerns, with instructor feedback.
- Plan for the continued use of this process back at work.
- Tools that support continued use of this process.

You will learn the concepts in full group, then practice and apply them individually or in small groups. This will enable you to test your understanding of the concepts and benefit from a variety of perspectives.

In order to participate more effectively in the workshop, read Chapters 1, 2, and 7 from *The New Rational Manager* and then complete the pre-workshop information. These chapters can be downloaded as PDFs using the following link: <http://www.kepner-tregoe.com/training-workshops/prework/situation-appraisal-and-problem-analysis/>. *The New Rational Manager* is available as an eBook. Instructions to download it will be given to you by your instructor in the workshop.

### Preparation

To get the most from this workshop and to make it a high-value experience for you and your organization, you will need to do three things:

- Identify your reasons for attending the workshop (your personal learning objectives);
- Identify your work-related concerns that you can address during the workshop; and
- Identify information you will need to make progress on your work-related concerns.

### Personal Learning Objectives

In preparation for the *KT Situation Appraisal and Problem Analysis* workshop, you will need to develop your own set of learning objectives. To help identify these objectives, ask:

*By the end of the workshop, what do I expect to have learned?*

*What do I expect to be able to do differently when I return to my job?*

*How will I know this has been a valuable learning experience for me?*



# SITUATION APPRAISAL PROBLEM ANALYSIS

*How will my success be measured in applying what I have learned back at work?*

List your three to five most important personal learning objectives here:

Please meet with your manager to discuss and agree on these objectives before the workshop. You will be asked to share these objectives with the instructor and the other learners.

## **Work-Related Concerns**

During the workshop, you will spend a significant amount of time applying the concepts and techniques to your work-related concerns. Please use the following questions to create a list of concerns. Once the workshop is underway, you will be asked to select concerns that can be best addressed by the Situation Appraisal and Problem Analysis concepts.

**Situation Appraisal** is a rational process for systematically planning the resolution of concerns. To prepare for Situation Appraisal, ask:

*What concerns do I face that are confusing, unclear, tough, complex, or new?*

*What concerns do I need to resolve first?*

*What concerns will require me to take various actions to resolve them?*

*What concerns will require the involvement of others for their resolution?*

Examples:

- Complaints about our portable D-70 drum fans are increasing.
- The XO2 feedline needs to be rebuilt with state-of-the-art electrical controls.
- A major customer has chosen to end their relationship with us.
- We are being audited by health and safety inspectors next week.

List three to five work-related concerns here:

# SITUATION APPRAISAL PROBLEM ANALYSIS

**Problem Analysis** is a rational process for finding the cause of a positive or negative deviation. To prepare for Problem Analysis, ask:

*What problems do I face that are confusing, unclear, tough, complex, or new?*

*What problems do I need to solve?*

*What problems will require me to recommend a fix?*

*What problems will I be involved in guiding or advising?*

Examples:

- Customers receiving incorrect e-mail membership renewal prompts.
- High traces of benzene detected in our flavored water.
- Battery boxes have cracked scores.
- Machine #3 output is 7 percent above normal.

List three to five positive or negative deviations here:

## ***Information Relevant to Your Work-Related Concerns***

To work towards resolving your concerns during the workshop, you will need information that is relevant to the priority concerns you have identified. Such information might include:

- Reports or studies
- E-mails or other correspondence
- Production data or performance reports
- Descriptions of job methods and procedures
- Project or business plans
- Information about alternatives, such as résumés, curriculum vitae, catalogs, proposals, etc.

# SITUATION APPRAISAL PROBLEM ANALYSIS

- Evidence of a problem, such as samples of defective products

Ask the following questions:

*If others were assisting me with this issue, what information would they need?*

*How much information can I recall accurately from memory?*

*Which concerns require me to review specific documents?*

Please list three to five priority concerns and supporting information or documents you will need to bring to the workshop.

Additionally, you may need to discuss these concerns with others from your organization during the workshop. Ask:

*Who has information about, or is familiar with, the concerns I have identified?*

*Who has a stake in seeing each concern resolved?*

Note people who can help with the three to five concerns identified above, their phone/fax numbers or e-mail addresses, and when they are likely to be able to communicate with you.

## Summary

Thank you for taking the time to prepare for the *KT Situation Appraisal and Problem Analysis* workshop. **Please bring this pre-workshop information and *The New Rational Manager* (if you have received a copy) to the workshop.** We look forward to your attendance and participation.

