

IDS Root Cause Analysis Worksheet

5 Whys framework and fishbone diagram template for identifying true root causes

Root cause analysis prevents symptom treatment. Use this worksheet during the Identify phase of IDS to peel back layers until you reach the actual problem worth solving.

THE COLD MEDICINE FALLACY

Treating symptoms provides temporary relief but guarantees the issue returns. If you're "solving" the same problem repeatedly, you're applying cold medicine when you need to address the underlying illness.

Part 1: The 5 Whys Framework

Ask "why" repeatedly until you can't go deeper. Typically takes 5 iterations to reach root cause.

INITIAL PROBLEM STATEMENT: WHAT SYMPTOM OR ISSUE ARE YOU OBSERVING?

WHY #1: WHY IS THIS HAPPENING?

WHY #2: WHY IS THAT THE CASE?

WHY #3: WHAT'S CAUSING THAT?

WHY #4: WHAT'S THE UNDERLYING REASON?

WHY #5: WHAT'S THE FUNDAMENTAL CAUSE?

ROOT CAUSE IDENTIFIED

You've reached root cause when:

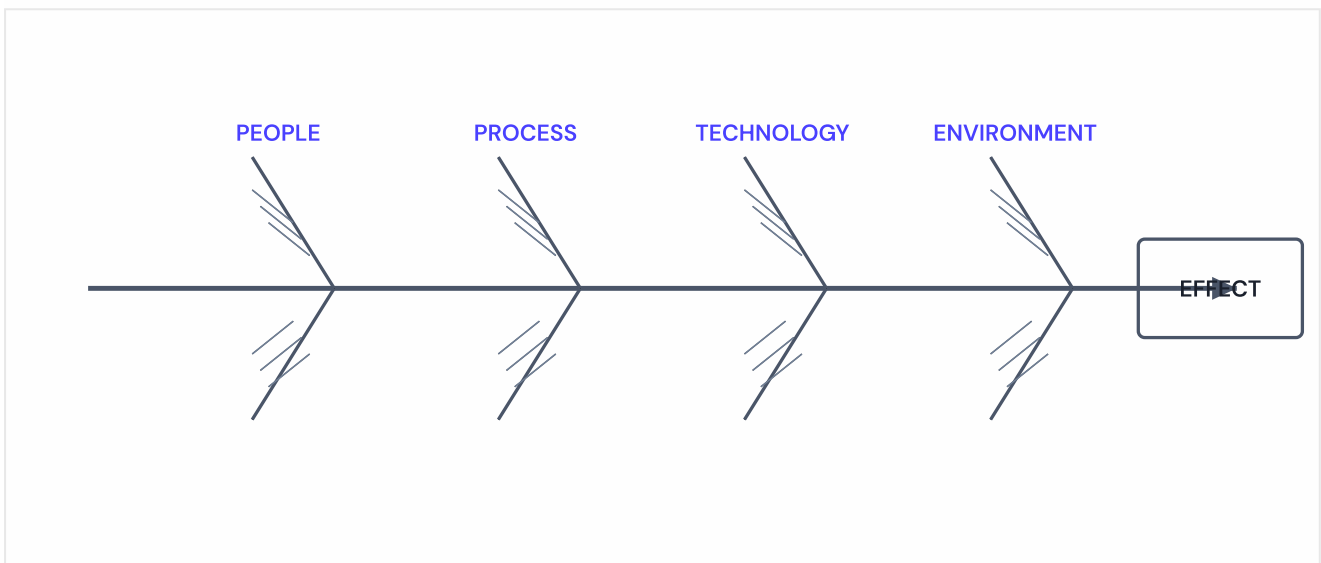
- Further "why" questions don't reveal new information
- The answer points to a process, system, or decision that can be changed
- Fixing this cause would prevent the original symptom from recurring

ROOT CAUSE STATEMENT: WRITE THE FUNDAMENTAL ISSUE IN ONE CLEAR SENTENCE

Part 2: Fishbone Diagram (Ishikawa/Cause-and-Effect)

Alternative method for complex issues with multiple contributing factors. Organize potential causes into categories.

EFFECT/PROBLEM: WHAT'S THE ISSUE YOU'RE ANALYZING?



PEOPLE

Skills, training, motivation, communication

PROCESS

Procedures, workflows, handoffs, bottlenecks

TECHNOLOGY

Tools, systems, integrations, capabilities

ENVIRONMENT

Market conditions, competition, culture, workspace

HOW TO USE THE FISHBONE

Brainstorm potential causes in each category. Look for causes that appear in multiple categories—those are often the true root causes worth addressing.

Part 3: Action Items

Convert root causes into concrete actions with clear ownership.

ROOT CAUSE	PROPOSED SOLUTION	OWNER	DEADLINE	STATUS

Root Cause Analysis Tips

✓ ✓ DO

- Ask "why" until you can't go deeper
- Look for process or system failures
- Identify actionable causes you can change
- Involve people close to the problem
- Focus on prevention, not blame

✗ ✗ DON'T

- Stop at the first answer
- Blame individuals instead of systems
- Accept "that's just how it is"
- Treat symptoms instead of causes
- Skip documentation of your analysis