

IDS Session Checklist

Timing, questions, and completion criteria for each phase of the Identify-Discuss-Solve process

Use this checklist to facilitate effective IDS sessions during your L10 meetings. Each phase has specific timing, key questions, and completion criteria to ensure issues are fully resolved.

Time Allocation Overview

| Phase | Time Allocation | Typical Duration (20-min Issue) | Purpose |
|----------|-----------------|---------------------------------|-----------------------------------|
| Identify | 10% | 2 minutes | Clarify the real root cause |
| Discuss | 70% | 14 minutes | Explore solutions collaboratively |
| Solve | 20% | 4 minutes | Commit to action with ownership |

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Identify Phase (10% of Time)

KEY QUESTIONS TO ASK

- **"What's the actual issue here?"** — Get past symptoms to root cause
- **"Why is this happening?"** — Dig deeper with each answer
- **"Is this the real problem or a symptom?"** — Test if you've hit bedrock
- **"Can you state it in one clear sentence?"** — Force clarity

COMPLETION CRITERIA

- ☐ [] The issue is stated as a single, clear sentence
- ☐ [] Everyone agrees this is the actual root cause (not a symptom)
- ☐ [] The issue is actionable (something can be done about it)
- ☐ [] You've asked "why" until reaching an answer you can solve
- ☐ [] The person who raised it confirms "yes, that's the issue"

FACILITATOR TIP

If you can't write the issue in one sentence, you haven't truly identified it yet. Keep asking clarifying questions until you can.

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Discuss Phase (70% of Time)

DISCUSSION GROUND RULES

- **Everyone speaks once before anyone speaks twice** — Ensure all voices heard
- **Stay on topic** — Tangents go to the issues list
- **Debate ideas, not people** — Keep it depersonalized
- **Build on each other's contributions** — Not a round-robin of opinions
- **Challenge assumptions** — Immediate agreement means shallow exploration

KEY QUESTIONS TO ASK

- **"What solutions have we tried before?"** — Learn from history
- **"What's preventing us from solving this?"** — Identify blockers
- **"What would 'solved' look like?"** — Define success
- **"Who else has solved this problem?"** — Look for external examples
- **"What's the worst that could happen if we do nothing?"** — Assess urgency

COMPLETION CRITERIA

☐ [] All team members have contributed to the discussion

☐ [] Multiple potential solutions have been explored

☐ [] Pros and cons of main approaches have been aired

☐ [] No new information is emerging (discussion has plateaued)

☐ [] The team is ready to commit to a path forward

WATCH OUT FOR

The Discussion Trap: If the same points are being repeated or the discussion exceeds 20 minutes without progress, cut it off and force a solve. Perfect information is the

enemy of progress.

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Solve Phase (20% of Time)

THREE TYPES OF RESOLUTION

1. ACTION RESOLUTION

Someone commits to doing something specific by a deadline.

Required elements: Specific deliverable + Single owner + Deadline (typically 7 days)

2. CLARITY RESOLUTION

The solve is achieving shared understanding. No action required because the issue was informational.

Confirmation: Team acknowledges the information and moves on.

3. INFORMATION RESOLUTION

Team needs more information before deciding. Assign someone to gather specific data.

Warning: If you can't articulate exactly what information you need, you're stalling.

KEY QUESTIONS TO ASK

- "What's the specific action?" — Make it concrete
- "Who owns this?" — Single person accountability
- "What's the deadline?" — Create urgency
- "How will we know it's done?" — Define completion
- "Does anyone object to this solution?" — Check for buy-in

COMPLETION CRITERIA

- ☐ [] A specific action or decision has been made
- ☐ [] One person is accountable (not "the team" or "we")
- ☐ [] Deadline is set (typically within 7 days)
- ☐ [] To-do is written down with owner and deadline
- ☐ [] Everyone commits to the solution (even if not everyone's first choice)
- ☐ [] Issue is removed from the issues list or marked as resolved

FACILITATOR TIP

Don't accept "soft solves" like "monitor the situation" or "keep an eye on it." Every IDS must produce either a concrete action, a clear decision, or explicit agreement to drop the issue.

Quick Reference: Common Facilitator Interventions

| SITUATION | INTERVENTION |
|-----------------------------|--|
| Stuck in Identify phase | "Let's state it as one sentence and move to discussing solutions." |
| Discussion going in circles | "We've been discussing this for 15 minutes. What's the action?" |
| One person dominating | "You've made that point. Let's hear from others." |
| Tangent emerging | "Great point—adding it to the issues list. Back to [current issue]." |
| Soft solve proposed | "What's the specific to-do? Who owns it? What's the deadline?" |
| No clear owner | "We need one person accountable. Who's taking this?" |