Kepner-Tregoe Methodology

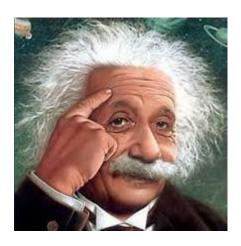
(English version - částečně)

Skorkovský Department of business economy

Developed by Charles H. Kepner and Benjamin B. Tregoe in the 1960s.

- Albert Einstein

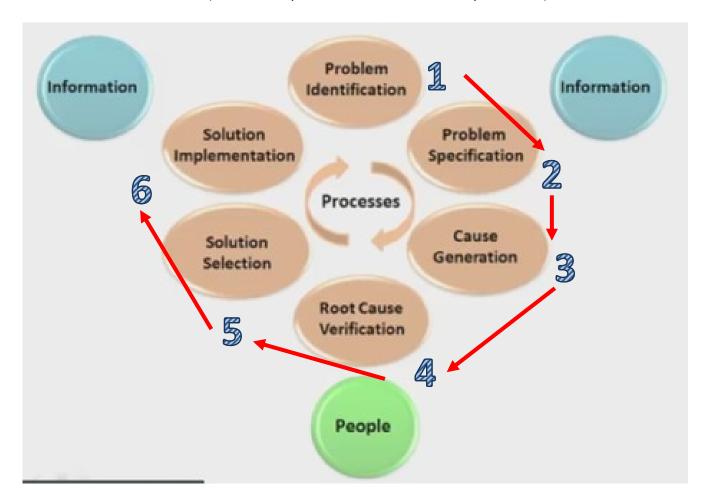
Formulace problému je mnohem důležitější než jeho řešení, které může být pouze otázkou matematické nebo experimentální dovednosti.



Related actions – na sebe navazující akce

(Formulace problému=identifikace a specifikace)

Resource: taken from K&T vidoes



- 1 nezvládnutí pandemické situace
- 2 vysoké počty nakažených, vysoká smrtnost,
- 3 odpírači, nedůvěra obyvatelstva v nařízení, každý hraje jenom na sebe,...
- 4 neschopnost vlády
- 5 změna ve vládě, nové metody obrany proti viru, očkovací centra, kampaň pro očkování,...

Apollo 13 – Houston, Houston, do you read me? We have a big problem....!

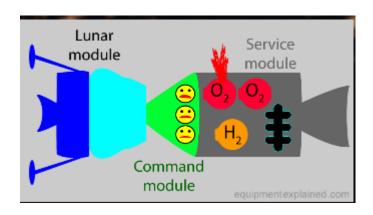


The Apollo 13 team is famous for bringing back the astronauts stranded in space by solving difficult and complex problems. The teams solving the problems has used the **Kepner-Tregoe** (KT) methodology!

Appolo 13 – description

(problem and solution)

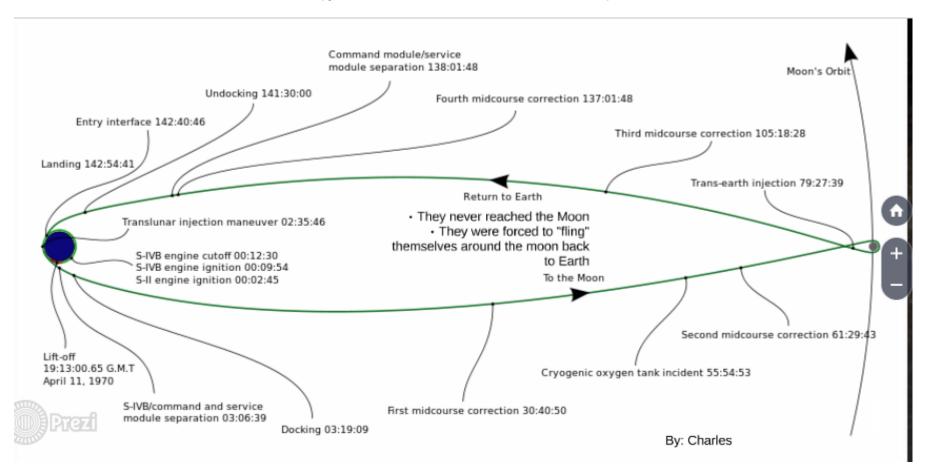
https://spectrum.ieee.org/tech-history/space-age/apollo-13-we-have-a-solution



https://prezi.com/ ohiqi4xzcxt/tier-v-problems-and-solutions-on-apollo-13/

Appolo 13 – description

(problem and solution)



Kepner Tregoe is used for decision making (finding best possible choice) .

Nalezení nejlepšího možného rozhodnutí) (text níže -> domácí studium)

It is a structured methodology for **gathering information** and prioritizing and evaluating it.

Strukturovaný přístup jak shromáždit informace a dát jim správnou prioritu

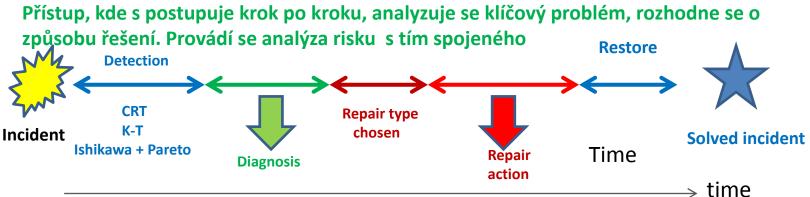
It is very detailed and complex method applicable in many areas, which is much broader than just idea selection.

Detailní a komplexní metoda, kterou je možné aplikovat v různých oblastech- není to pouze výběr plánu respektive nápadu jak řešit problém

It is called also a root cause analysis and decision-making method.

Jde o analýzu klíčového problému – úzkého místa (TOC přístup)

It is a step-by-step approach for systematically solving problems, making decisions, and analyzing potential risks.



K-T postup

Nemusíte být zrovna astronauti, abyste mohli tuto metodu uplatnit v praxi. Pravdou je, že se vám bude hodit v jakékoliv práci – zvlášť pokud se pohybujete v manažerské oblasti. Následuje popis 4 základních kroků

1. Vyhodnocení situace

Orientujte se. Situace může vypadat složitě, ale po základní analýze budete mít pravděpodobně jasno. Udělejte si seznam toho, co je potřeba řešit a to včetně priorit jednotlivých kroků

2. Analýza problému

Popište všechny příčiny. Nakonec najdete, kde je zakopaný pes (Ishikawa, CRT)

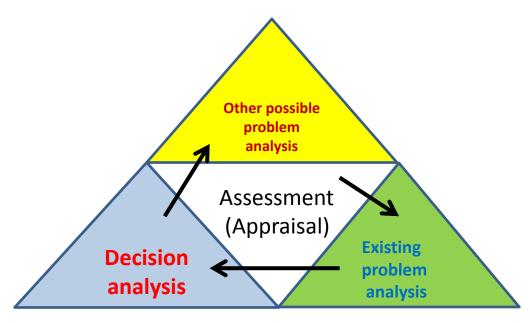
3. Rozhodovací analýza

Problém a příčinu už znáte. Najděte možné řešení. Zkuste to vícekrát a proveďte PROS a CONS hodnocení.

4. Analýza rizik

Nepřehledné situace, nežádoucí jevy, nebezpečí špatného rozhodnutí, nesprávné nastavení priorit toho co se má řešit a jak se to má řešit.

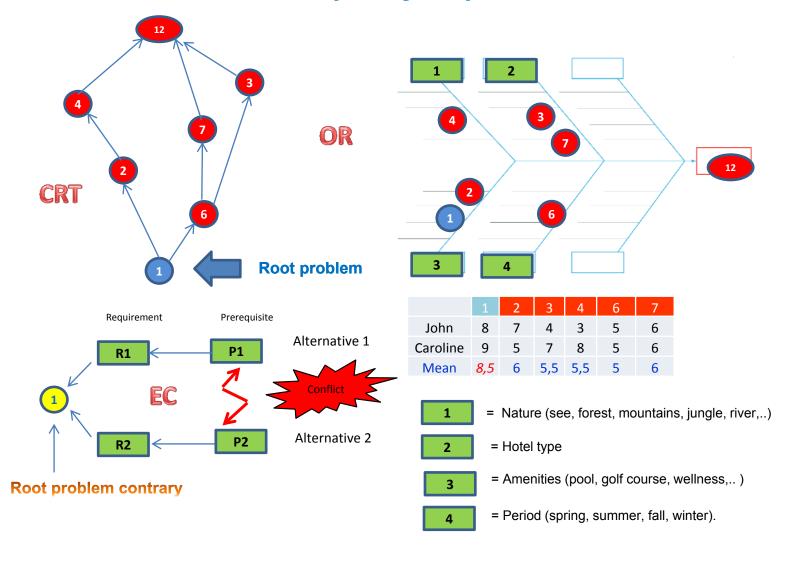
K-T -> grafické znázornění předchozích kroků



Appraisal=review= assessment=evaluation = Hodnocení

- 1. Assessment (appraisal) priorities assigned to current situation
- 2. Existing Problem analysis to find root problem (cause)
- 3. **Decision analysis** to select way to react (MaxiMax,MaxiMin,..)
- **4. Future problem analysis** (risk analysis)

CRT-Ishikawa – bylo již prezentováno



Alternative means how to solve problem and what kind of pay-off you will get

Vyhodnocení situace – doplnění již sdělených informací

- Identifikace problémů a jejich seznam
- Rozdělit sféry zájmu a nastavení priorit co řešit teď a co později
- Jak problém postupně řešit step-by-step approach

- Plan for who is involved, what they will be doing, where they will be involved, when it happened and the extent of involvement (magnitude)
- KDO CO KDE KDY ROZSAH

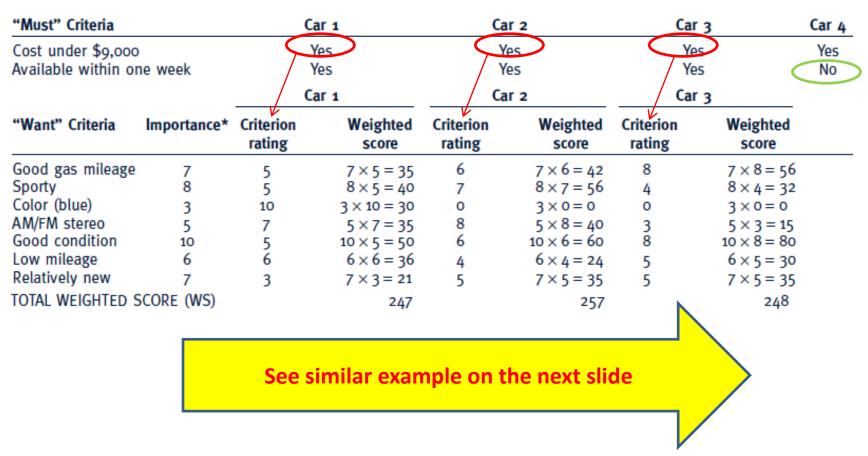
WHO WHAT WHEN WHERE EXTENT



Rozhodovací analýza - výběr mezi více alternativami – část rozhodovací analýzy- krok 3

- Identifikace -> co bylo rozhodnuto a jaké metody s použijí
- Klasifikace cílů -> důležité a méně důležité cíle
- Rozdělení cílů a nastavení míry jejich důležitosti
 - must (must-to-have) musíme to mít (finanční reporting požadovaný zákonem)
 - want (nice-to- have) bylo to hezké mít to všechno v barvách
 - faktor důležitosti-váha (1-10, kde 10 je nejvíce důležitý faktor)
- Vytvoří se alternativy různé metody řešení problému
- Alternativám se určí skupina MUST-TO-HAVE nebo NICE-TO -HAVE skupina a váhy (faktory důležitosti)
- Posoudí se nepříznivé (škodlivé) důsledky nápravných kroků (hodnocení rizika) a potvrzení a realizace té nejlepší volby
- Analýzy nákladů spojených s nápravnými kroky
- Aplikuje se nejlepší možná volba

Criteria rating



Importance can be understood as a Satisfaction score, meaning desirable but not essential. Criteria rating is related to want criteria and every car property

Which car to buy?

MUSTS	Α	В	С	D
Power Brakes	GO	GO	GO	GO
Power Steering	GO	GO	GO	GO
AM/FM Stereo	GO	GO	NO GO	GO
Automatic	GO	GO	NO GO	GO
Under \$15,000	GO	GO	GO	GO

WANTS	Weight	Score	WxS	Score	WxS	Score	WxS	Score	WxS
AirCon	10	10	100	0	0	$>\!<$	$>\!<$	10	100
Cassette	7	6	42	10	70	><	$>\!<$	10	70
Antilock Brakes	1 9	0	0	10	90	><	><	0	0
Air Bag	8	5	40	10	80	><	><	5	40
Rear Demist	6	10	60	0	0	><	><	0	0
Engine Size	6	8	48	6	36	><	><	10	60
Central Lock	5	5	25	10	50	><	><	10 5	25
Metal Paint	4	0	0	10	40	><	><	10	40
Warranty	8	10	80	7	56	><	><	3	24
Resale Value	7	7	49	7	40	><	><	4	28
	TOTALS		444		471				387
			- \ Crit€	erion	ating				
/			•						

Importance score, meaning desirable but not essential.

Zákazníci by to rádi měli, ale není to vůbec nutné a nepřináší to žádnou velkou hodnotu

Step 1 and Step 2

Step 1 Problem: Pick a replacement vehicle for the motor pool fleet

The definition of the problem dictates the requirements. As the vehicle is for a motor pool, the requirements will differ from those for a family car, for example.

Step 2 Requirements:

- 1. Vehicle shall be made in U. S. A.
- 2. Vehicle shall seat at least four adults, but no more than six adults
- 3. Vehicle shall cost no more than \$28,000
- 4. Vehicle shall be **new and the current model year**





Max 28000 USD







Min

Max

New car (current model)

Step 3 and Step 4

Step 3 Goals:

- · Maximize passenger comfort
- Maximize passenger safety
- Maximize fuel-efficiency
- · Maximize reliability of the car
- · Minimize investment cost

Step 4 Alternatives:

There are many alternatives but the requirements eliminate the consideration of a number of them:

Requirement 1 eliminates the products not manufactured in the USA Requirement 2 eliminates vans, buses, and sports cars (Ferrari no !!!!) Requirement 3 eliminates high-end luxury cars Requirement 4 eliminates used vehicles

Step 5

Step 5 Criteria:

"Maximize comfort" will be based on the combined rear seat leg and shoulder room. (Note: front seat passenger leg and shoulder room was found to be too nearly the same to discriminate among the alternatives.) 5

"Maximize safety" will be based on the total number of stars awarded by the National Highway Traffic Safety Administration for head-on and side impact. **10**

"Maximize fuel efficiency" will be based on the EPA fuel consumption for city driving. 7

"Maximize reliability" will be based on the reliability rating given each vehicle by a consumer product testing company. 9

"Minimize Cost" will be based on the purchase price. 10

Weighted criteria vector C(5,10,7,9,10) are values assigned by decision makers !!!!

Kepner-Tregoe table

(for 4 cars : Arrow, Baton, Carefree and Dash

Criteria/	Criteria		Arrow		Alter-	Tot	al Score
Want objectives	Weight				native		
					Score		
Comfort	5	86 in. rear seat	leg and should	der room, seats 5	6		30
Safety	10	14 stars			5		50
Fuel efficiency	7	21 mpg			9		63
Reliability	9	80			9		81
Cost	10	\$26,000			5		50
				Total			274
			Baton				
Comfort	5		leg and should	der room, seats 6	9		45
Safety	10	17 stars			88		80
Fuel efficiency	7	19 mpg			8		56
Reliability	9	70			7		63
Cost	10	\$21,000			8		80
				Total			324
			Carefree				
Comfort	5	80 in. rear seat	leg and should	der room, seats 5	4		20
Safety	10	15 stars			6		60
Fuel efficiency	7	22 mpg			10		70
Reliability	9	65			5		45
Cost	10	\$17,000			10		100
				Total			295
			Dash				
Comfort	5	89 in rear seat	leg and should	er room, seats 6	10		50
Safety	10	19 stars		10		100	
Fuel efficiency	7	21 mpg		9		63	
Reliability	9	85			10		90
Cost	10	\$24,000			6		60
				Total			363

Last step – Validation (check)

Last Step Validate Solution:

The totals of the weighted scores show that the **Dash** most nearly meets the wants/goals (or put another way, has the most "benefits"). Dash meets all the requirements and solves the problem !!!

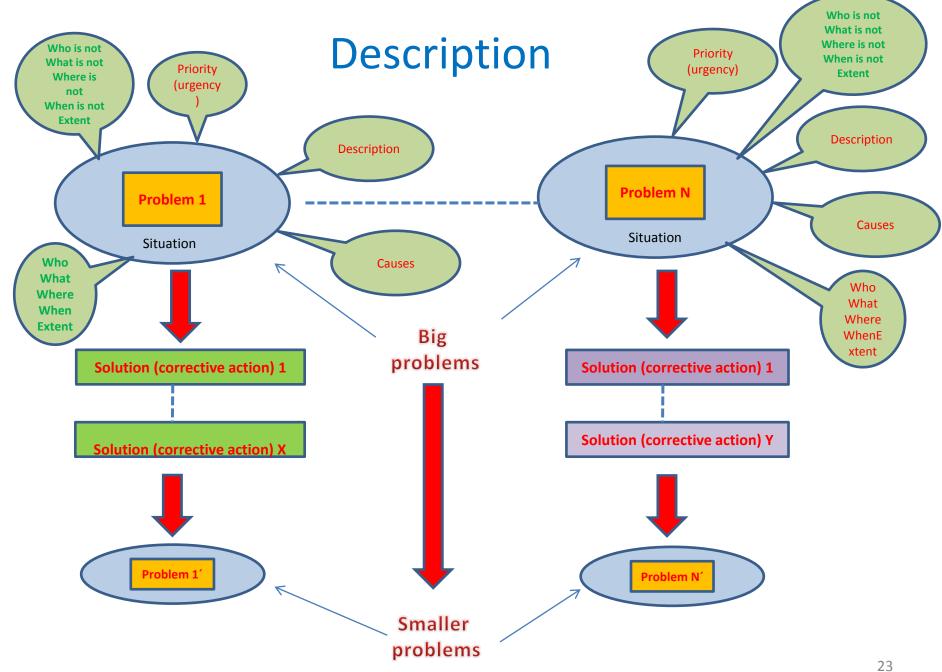


(Analýza problému) – kroky 1-4 (snímek 8)

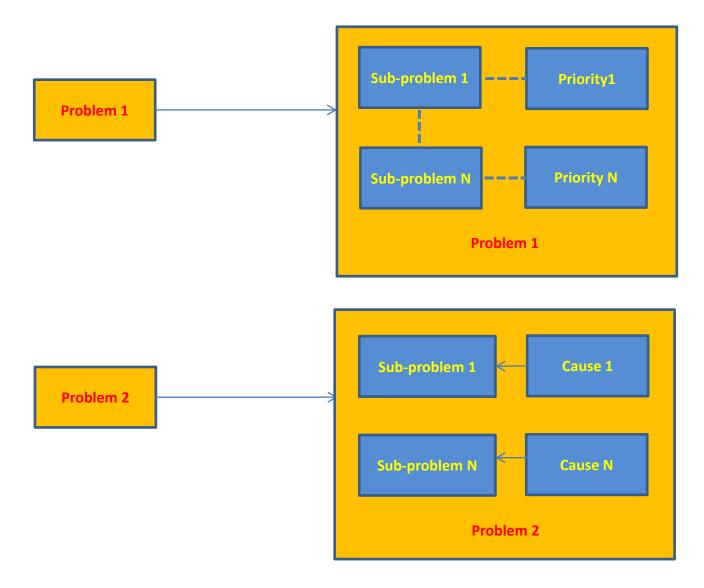
• State the problem (definice a popis problému) Specify the problem by asking (důležité otázky, které nyní budeme probírat na příkladech):

what is and what is not, who is and who is not, where is and where is not

- Develop possible causes of the problem (similar to CRT or Ishikawa) – (detekce příčin -> opět popis na snímku číslo 8)
- Test and verify possible causes -testování a verifikace možných příčin
- Determine the most probable cause (root cause) -nalezení klíčového problému
- Verify any assumptions verifikace předpokladů
- Try the best possible solution and monitor what will be a situation after applied correctives step- aplikace zpětné vazbykorekce nežádoucího stavu

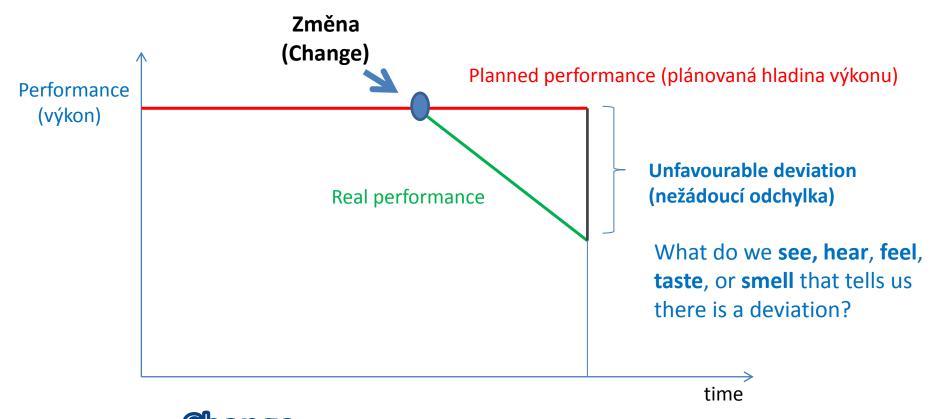


Decomposition, priorities and causes



Example of problem manifestation

(snížení účinnosti)



Final effect of the Change = PROBLEM (e.g. server crashed, hard disk with database crashed)

Then we have to ask: Who, What, Where, When, and to what Extent –Size (how much, how many)? And opposite types of questions as well.

Server crashed !!!! home study

- Server crashed (to je opravdu zjednodušená definice problému)
- The e-mail system crashed after the 3rd shift support engineer applied hot-fix XYZ to Exchange Server 123 (better definition of the problem)
- Comment: WHO is not mentioned here but could be Different staff (3 shift) –see table

	IS	COULD BE but	IS NOT	DIFFERENCES	CHANGES
WHAT	System failure	Similar systems/situations not failed	Similar systems/situations not failed		?
WHERE	Failure location	Other locations that did not fail	Other locations that did not fail		?
WHEN	Failure time	Other times where failure did not occur	?		?
EXTENT	Other failed systems	Other systems without failure	?		?
		2011 2 251 112 1127	DIFFERENCE	011111	

	IS	COULD BE but IS NOT	DIFFERENCES	CHANGES
WHAT	Exchange Server 123 crashed upon application of hot-fix XYZ	Other Exchange Servers getting hot-fix XYZ	Different staff (3rd shift) applied this hot-fix	New patch procedure from vendor
WHERE	3rd floor production room without vendor/ contractor support	Anywhere else with vendor/ contractor support	Normally done by vendor	New procedure, first time 3rd shift applies hot-fixes
WHEN	Last night, 1:35am	Any other time or location	None noted	
EXTENT	Any Exchange Server on 3rd floor	Other servers		

History (and best practice) says that the root cause of the problem is probably due to some recent change. WHAT, WHERE, WHEN and EXTENT will be shown on next slides

Test the Most Probable Cause

home study

Clarifying problem Analysis (example)

Potential root cause:	True if:	Probable root cause?
Exchange Server 123 has something wrong with it	Only Exchange Server 123 has this problem	Maybe
Procedure incorrect	Same procedure crashes another server	Probably
Technician error	Problem did not always reoccur	Probably not

We have to ask (where Qi =QUESTION i):

Question	IS	IS NOT		
What (identify)	Q1	Q2		
Where (locate)	Q3	Q4	See next slides	
When (timing)	Q5	Q6		-
Extent (magnitude)	Q7	Q8		

Problem Analysis - What

Is

- What specific object(s) has the deviation?
- What is the specific deviation?

Example for **Is**:

- 1. What specific **object IS** related to the defect? Inventory Valuation Objects in **database A**
- 2. What specifically is the defect (deviation)? Inventory Adjustment does not work

1-> see setup of the database and see differences

2->see algorithm used for calculation and parameters used. You can see , that in production calculation related algorithm is not functional

Is Not

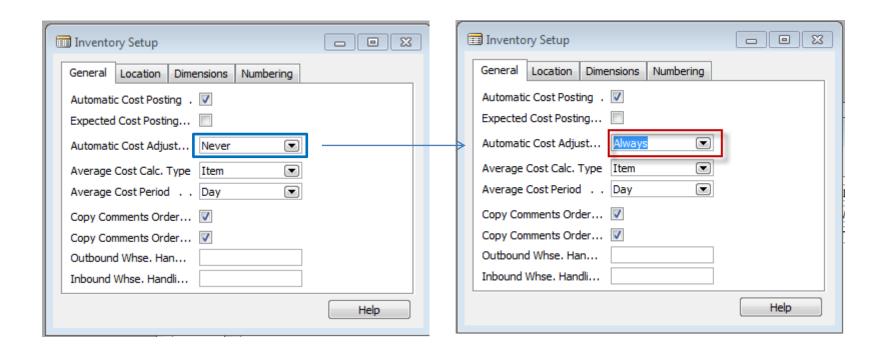
- What similar object(s) could have the deviation, but does not? (It did not happen)
- What other deviations could be reasonably observed, but are not? (It did not happen)

Example for Is Not:

- What specific **object IS NOT** related to the defect?
 Inventory Valuation Objects in **database B**
- 2. What specifically is not the defect (deviation)?

 Adjustment is working good setup in database B
- 1 -> Setup has another parameters ON
- 2-> Algorithm is used also for production where not error occurs

See two MS Dynamics Setup screens (related to the problem specified recently)



Back to vampires: Problem Analysis - What

Is

 What specific object(s) has the deviation?



What is the specific deviation? - bites on the neck

Example for **Is**:

1. Nice young girl's neck and strange look of anemic person





Is Not

 What similar object(s) could have the deviation, but does not? (It did not happen)



česnek

What could the specific deviation? but does not? (It did not happen) – bites=stigma, anemia

Example of **Is Not**:

- 1. Girl with garlic in her hands
- 2. No bites
- 3. Healthy



Another example for What IS and What IS NOT as well as Where IS and Where IS NOT

IS girl Sarah visited Dracula lower castle without a bunch of garlic, but IS NOT not the one (Emily) having bunch of garlic and visiting Špilberk castle in Brno



Dracula Castle (Where IS)









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Problem Analysis - Where

Is

- Where is the object when the deviation is observed? (geographically)
- Where is the deviation on the object?

Example for Is:

1. Old castle in the mountains (Romania)

Where IS: Romanian Carpathian mountains where **it is** very easy to meet a lot of vampires there

Is Not

- Where else could the object be when the deviation is observed, but is not?
- Where else could the deviation be located on the object, but is not?

Example for Is Not

Brno castle Špilberk
 Where IS NOT possible to meet vampires
 (only lovers and children and seniors)

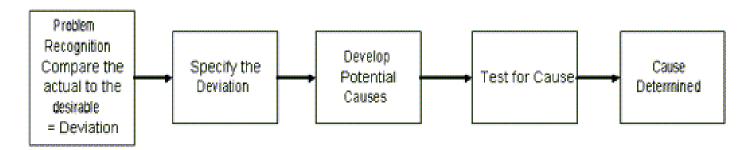
Analýza problému a potvrzení pravé příčiny jeho vzniku

- Co lze udělat pro ověření všech možných příčin?
- Jak lze tyto příčiny modelovat při reálných procesech?
- Jak můžeme demonstrovat vztah příčiny a následku (CRT nebo FBD ?)
- Když budou přijata nápravná opatření, jak budou výsledky těchto akci kontrolovány (měřeny)?

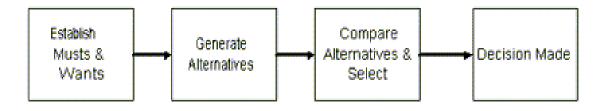
Let's Look At Some Problems

Systematic Problem Solving Decision making Overview

Problem Definition Process



Decision Making Process



Planning the Next Steps

- Problem Analysis (tři otázky)
 - Do we have a deviation?
 - Is the cause unknown?
 - Is it important to know the cause to take effective action?
- If the answer is YES to ALL three listed problems above, than you have a big problem, Huston !!!

Problem analysis table template (Home study)

		IS	IS NOT	Distinction	Cause
What	Identify:	What is problem?	What is not problem?	What difference between is and is not?	What is possible cause?
Where	Locate:	Where is problem found?	Where is problem not found?	What difference in locations?	What cause?
When	Timing:	When does problem occur?	When does problem not occur?	What difference in timing?	What cause?
		When was it first observed?	When was it last observed?	What difference between 1st, last?	What cause?
Extent	Magnitude:	How far does problem extend?	How localized is problem?	What is the distinction?	What cause?
		How many units are affected?	How many not affected?	What is the distinction?	What cause?
		How much of any one unit is affected?	How much of any one unit is not affected?	What is the distinction?	What cause?

Problem description (example)

On a new model of airplane, flight attendants develop rash on arms, hands, face (only those places). It only occurs on flights over water.

Usually disappears after 24 hours. No problems on old planes over those routes.

Does not affect all attendants on these flights, but same number of attendants get it on each flight. Those who get rash have no other ill effects.

No measurable chemicals, etc., in cabin air.

Rash arm ->



Results ????



Problem analysis real table

	IS	IS NOT	DISTINCTION
WHAT:	Rash	Other illness	External contact
WHEN:	New planes used	Old planes used	Different materials
WHERE:	Flights over water	Flights over land	Different crew procedures
EXTENT:	Face, hands, arms	Other parts	Something contacting face, hands and arms
	Only some attendants	All attendants	Crew duties

Distinction=Difference

Problém s rychlosti připojení

	İs	Is Not	Differences	Changes
What	Remote access running slowly	Local access	Use of WAN	
Where	In Germany	In other countries	Different WAN links and routers	
When	All the time	At particular times or days.		Firmware on German routers had a security
	Since 20-Jan	Before 20-Jan		patch on 20-Jan
Extent	All transactions take about	More than twice normal time.		
	twice normal time	Complete failure.		

Stále jsou přijímány nesprávné telefonáty

Is/Is Not Analysis

Problem Statement - Incorrect telephone calls are constantly being received

	Is	<u>Is Not</u>	<u>Therefore</u>
Where	In the sales section of the Dept	In the purchasing section of the Dept	Applicable to Sales only.
When	Late afternoon – usually post 4pm	Before 4pm	Only happens after 4pm
What (Kind)	Internal calls	External calls	Must be caused by an internal Dept.
How (Much)	5 calls per day	95 calls per day	Only small number of total calls received
Who	Finance Dept	Other Departments	Incorrect Directory being used by Finance

The analysis Identified – The Evening Shift staff in Finance had incorrect pages in their phone directory



WORLD CUP & QUALITY MANAGEMENT

SAMUEL K. M. HO

Keywords: Quality Management, World Cup, problem solving

Abstract: In the semi-final World Cup 1990, England lost to West Germany in the penalty knockout. The Italian team had similar experience when they lost to Brazil in the World Cup final 1994. History repeats itself -- in WC'98, England lost to Argentina and Italy lost to France by the same mistakes. In an attempt to audit the defeats, the author developed the S-H Method of managerial auditing and used the World Cup match examples to illustrate the significance of the S-H Method in auditing managerial processes.

Author: prof. Samuel K.M Ho, School of Business, Hong Kong Baptist University, Hong Kong

Rule #1: In a successful penalty-shoot, the ball ends up in the goal away from the goal-keeper's reach. The most likely positions are those along the inside edges of the goal-posts, the higher the better, provided that the ball does not go over the bar. The football player must target these points.

Rule #2: The shooter should assume that there is nobody at all in the field, and concentrate on shooting the ball into the positions defined as the best.

	ENGLAND			WEST GERMANY			
Goal	Player	Result & Analysis	Goal	Player	Result		
E1	Lineker	In	W1	Brehme	In		
E2	Beardsley	In		Matthaeus	In		
E3	P1att	In despite being touched by the goal- keeper	W3	Riedle	In		
E4	Pearce	Ball caught by the goal-keeper (violating Rule #1)	W4	Thon	In		
E5	Waddle	Ball flew above the goal (violating Rule #2)		WON			

Table 1 Score Table of Penalty-shoot Knock-out -- World Cup Semi-final 1990: England vs. West Germany

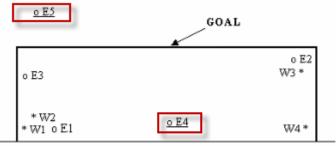


Figure 3

Approximate Positions of Penalty-shoot Goals -- World Cup Semi-final 1990: England (E) vs. West Germany (W) (Underlined balls indicate missing shoots)

Matice na dalším snímku

Example of analysis

Table III

Problem-solving worksheet applied to analyse World Cup match problem.

Is the problem?	Is as expected?	The point of change
Weak penalty shooting	Performance during the match	Difference in penalty shoot-out tactics
Two out of the five England players	German players	The way some players struck the ball
After 120 minutes of football	During the match	Penalty shoot-out took place after a long and tiring match
At the points easily reached by the goal- keeper Above the bar	At the positions near the posts, inside the goal (E2 and E3)	Ball easily caught by the goalkeeper or ended up outside the goal
Two failures out of five attempts	The German team did not miss out of four attempts	Very significant
2 Certain players are i3 Some players are aftand have forgotten a	Some players not following rule 1 Certain players are incapable of shooting the ball at the right spot Some players are affected psychologically by the presence of the goalkeeper and have forgotten about rule 2	
	Two out of the five England players After 120 minutes of football At the points easily reached by the goal- keeper Above the bar Two failures out of five attempts Some players are if and have forgotten a	Weak penalty shooting Performance during the match Two out of the five German players England players After 120 minutes of During the match football At the points easily At the positions near the reached by the goal-keeper (E2 and E3) Above the bar Two failures out of five The German team did not attempts miss out of four attempts 1 Some players not following rule 1 2 Certain players are incapable of shooting the ball a 3 Some players are affected psychologically by the prand have forgotten about rule 2

- WHAT -- Lack of proper training led to the weak penalty-shooting, mostly due to players not adhering to Rule #1 (see).
- WHO -- A significant number of players were making the mistake as a result of insufficient training.
- WHEN -- When players are tired, the physical condition may affect their decision making. This is why training is important.
- WHERE -- More stringent training on correct shooting (Rule #1).
- HOW SIGNIFICANT The importance of the match makes the problem very significant. Therefore training must be thorough.

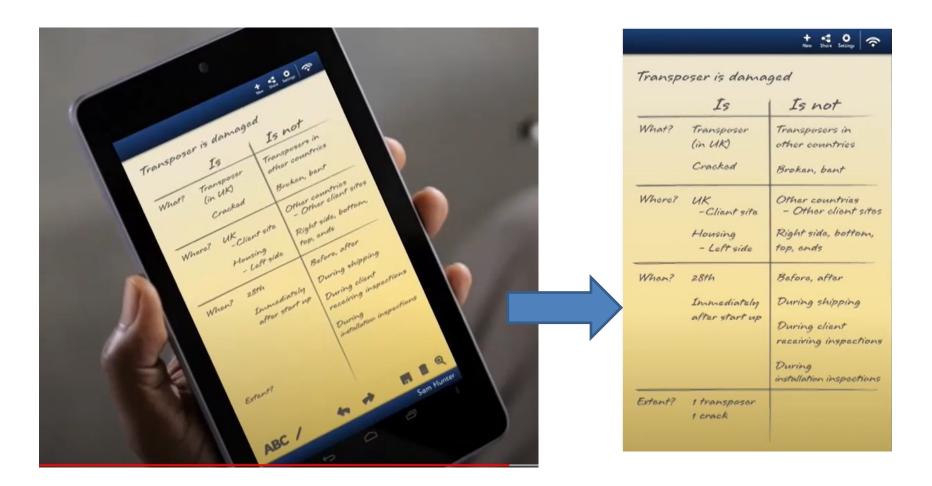
(177) Rapid Problem Analysis - YouTube

Viz další snímek s vazbou na to, co manažer na letišti řeší

Vysvětlení co je to transposer, o kterém se ve videu mluví

https://technicpack.fandom.com/wiki/Transposer





Dohlédněte prosím to video až do konce! Je tam řešení!!

Transposer = zařízení na přemisťování, Cracked – popraskaný, Broken=zlomený, Bentohnutý. V Extent oblasti chybí velikost popraskání (1,5 cm).

Výsledek je ten, že tato závada nebude příčinou **přerušení výroby** (důležitá text v čase 5:00 od začátku prezentace na letišti). Pokud by jednalo o problémy z matriálem, ze kterého byl transposer vyroben, pak by to muselo být všude. Stejně tak je to s problémy při dopravě. Takže někdo na straně zákazníka transposer nesprávně používal (při jeho instalaci nebo v průběhu operace se tímto zařízením) a to dne 28.x

Thanks for Your attention

