



# Human Performance Event Review

Build trust, improve front-line expertise, and get 3-7 process improvements to help prevent recurrence of any error-based incident or event

## THE PROBLEM



Misunderstanding, miscommunication and other errors can disrupt lives, ruin careers, and waste millions of dollars in companies just like yours.

- A Substation Engineer misunderstood a procedure and accidentally cut power to a major customer. Result? Two days of chaos costing \$74,000.
- An Electric System Operator allowed two field teams to work on the same circuit without knowing about each other. Risk? A potential fatality.
- An executive miscommunicated technical specs and accidentally ordered six new bucket trucks without an essential feature. Cost? \$1,500,000.

## COMMON APPROACH VS. A BETTER SOLUTION



	<b>Traditional Investigations</b>	<b>Event Reviews</b>
	Identify what (or who) caused the error in the past	Identify simple, high-value, low-cost, process improvements to prevent <i>future</i> errors
	Focus on employee actions	Focus on improving processes and other organizational systems that guide our actions
	Aim to eliminate all errors	Aim to build resilience so that errors don't disable day-to-day operations

## RESULTS



*“Your investigation and analysis was the most thorough and well-documented of any we have had to date... **the interviews and investigation were not threatening in any way... we have already implemented some changes to our processes.**”*

~ Manager of Electric Transmission System Operations  
in an electric power utility serving 1+ million customers

*“We needed a different lens from a Human Performance perspective, a process of documentation that captured the whole event, and delivered clear and concise objects! Thank you Jake for bringing that new perspective!”*

~ Brenda Houtz, MBA, NERC RC,  
Executive Director Grid Management, Consumers Energy

## IDEAL IF:



- Your event involves misunderstandings, miscommunications, or other complex errors
- You take a Learning-Based approach & seek to fix the problem, not the blame
- I can speak directly with the people involved (Event Participants)
- Your event does not involve fatalities or lawyers

## HOW IT WORKS



- 1) I meet with leaders, Subject Matter Experts (SMEs), and Event Participants to confirm: schedule, logistics, and a non-punitive, Learning-Based approach.
- 2) I lead a 1-4 hour After Action Review to build trust and gather basic information.
- 3) For simple events (one person & one error), we finalize 1-2pp of results & finish.
- 4) For complex events (multiple people & errors), we draft a target question, create a timeline, and identify anomalies (gaps between WAI and WAD).
- 5) We ask and answer 6 levels of questions to reveal the individual, situational, supervisory, and organizational factors that led to each anomaly.
- 6) We brainstorm simple, high-value, low-cost, low-risk process improvements that will best prevent similar anomalies on similar jobs in the future.
- 7) We summarize our findings into a concise presentation detailing the 3-7 best process improvements plus the reasoning and evidence behind each one.

## YOUR PROCESS IMPROVEMENTS



Your 3-7 process improvements will include some of the most practical strategies, techniques, and principles that I've collected in 15+ years experience, including:

• Fail-Safes	• Psychological Safety
• Weak Signals	• Scan & Focus (Situational Awareness)
• Defensive Design	• Mechanistic vs. Adaptive Thinking

## COST & ZERO-RISK GUARANTEE



- Simple, flat fee per ½ day. No hidden charges. Easily payable via credit card.
- If you're unsatisfied with any session I lead, send me written details within 24 hours.
- If I can't create a solution that's fair for us both, then you don't pay for that session.

## LEADER



- 10 years experience in an electric power utility serving 1+ million customers
- Helped analyze over 300 incidents, errors, and other events
- 8 years as an Advisor & Speaker on Safety, Human Performance, and HOP
- Clients include: Energy Safety Canada, US Dept. of Energy, NERC & Chevron
- Served on high-reliability teams as a firefighter, EMT, and military paratrooper

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Call, email or scan to schedule your free, no-pressure  
25-minute discovery call to learn more.