



DATA OBSERVATION PROTOCOL

This protocol is designed to support teams in describing, analyzing, and building a shared understanding of data. Equal turn-taking and guiding questions are utilized to help teams move systematically through a data set and avoid premature interpretation. This tool may be used in isolation or as part of a deeper root cause analysis investigation.

Participants

Roles: Facilitator, Notetaker, Timekeeper

Group Size: 3-7 people

Time: 45 minutes

Materials

In Person:

- Shared notetaking: large poster paper and markers
- Individual notetaking: sticky notes or paper and pen or pencils.

Virtual: Share notetaking materials and screen sharing

Instructions For Use

1. **Private think time:** 5-7 minutes to review the data individually.
2. **Group go-rounds:** Facilitator asks participants the guiding questions one at a time and asks each participant to share their response. Notetaker records all responses.

Guiding Questions

- What do you see/notice?
- What does the data indicate are areas of strength?
- What does the data indicate are areas of need?
- How has performance changed over time?
- What patterns do you notice?
- Are there any outliers in the data that may need further investigation?
- What questions do you have?
- What additional information is needed to better understand the problem?

3. **Closing:** open discussion

- Looking at the responses, what are the big takeaways?
- What did we learn?
- What are our next steps?
- Calendar any follow-up items.