



# Postmortem Checklist

Incident Data Collection	Root Cause Analysis	Lessons Learned & Action Item Design
<ul style="list-style-type: none"><li><input type="checkbox"/> Describe high level impact in executive summary</li><li><input type="checkbox"/> Clarify impact:<ul style="list-style-type: none"><li><input type="checkbox"/> Users affected</li><li><input type="checkbox"/> Regions affected</li><li><input type="checkbox"/> Customers affected</li></ul></li><li><input type="checkbox"/> Classify severity categories</li><li><input type="checkbox"/> Complete the incident timeline fields for MTTx measures</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Sufficiently detail all contributing root causes</li><li><input type="checkbox"/> Use 5-why's or other root cause technique to ensure sufficient depth</li><li><input type="checkbox"/> Identify the trigger</li><li><input type="checkbox"/> Decide which root cause categories are indicated</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Explore what went well, what didn't work, and how we got lucky</li><li><input type="checkbox"/> Use lessons to derive action items</li><li><input type="checkbox"/> Make sure every action item has an associated item in the tracking system</li><li><input type="checkbox"/> Make sure you cover 2 most critical types: Mitigate &amp; Prevent</li></ul>

## Action Item Checklist

- ☐ Are the action items realistic and vetted with product owners?
- ☐ Have you considered ways to improve both prevention *and* resolution time?
- ☐ Have you considered similar or "rhyming" incidents and their corresponding action plans?
- ☐ Have you considered how to automate ways to prevent humans from making mistakes?
- ☐ Does your postmortem have at least one Critical Priority or High Priority action item? If not, is the risk of recurrence accepted by stakeholders?
- ☐ Have you negotiated the execution of action items with the responsible group(s)?

## Review/Approval/Socialization

- ☐ Has your postmortem been reviewed/approved per your team policy?
- ☐ Has any blameful language been removed/modified?
- ☐ Have you shared your postmortem with the original incident stakeholders?
- ☐ Have you shared your postmortem with your team?

- ☐ Is the postmortem available from your dashboards and tools?
  - ☐ Is your postmortem blameless and focused on system improvements?

**Glossary:**

- Severity categories: Severity categories to assist in analyzing incidents
- 5-whys: [https://en.wikipedia.org/wiki/5\\_Whys](https://en.wikipedia.org/wiki/5_Whys)
- Trigger: The point in the timeline at which the incident impacts production
- Rhyming incidents: incidents that are similar in nature but may not be exact repeats of each other
- Executive Summary: Used for high level reports, i.e. for those with shallow production knowledge.
- MTTx: Mean Time to x ( $x=(\text{detection}|\text{escalation}|\text{mitigation}|\text{resolution})$ )