Root Cause Analysis Template

Connected video: The Skills That Open Every Door (And How to Build Them) | Keyword: ROOT CAUSE

Step 1 - Define the problem clearly

Problem statement	Where/when it happens	Who or what is affected	How often	Why it matters
Customers keep calling back about pickup order status.	*Weekday afternoons, front counter and phone.*	*Customers, front desk, order team.*	*About 10 calls per shift.*	*Repeat calls slow down service and create frustration.*

Step 2 - Ask five whys

Why level	Example answer	My answer
Why 1	*Because customers do not know when the order is ready.*	
Why 2	Because the ready-for-pickup message is unclear.	
Why 3	Because staff use different wording in texts and phone calls.	
Why 4	Because there is no standard message template.	
Why 5	Because the process was never written down after the workflow changed.	

Step 3 - Check the cause categories

Cause category	Example prompts	My notes
People	*Who needs clearer roles, training, or handoffs?*	
Process	Which step is missing, duplicated, unclear, or too slow?	
Tools / technology	Which system, form, app, or template is causing friction?	
Information	What data, instructions, or communication is missing?	
Environment / timing	When or where does the problem get worse?	

Step 4 - Pick a fix and measure it

Root cause to address	Fix or experiment	Owner	Due date	How we will know it worked
No standard pickup message.	*Create one message template and test it for one week.*	*Front desk lead*	*Friday*	*Fewer repeat pickup calls per shift.*

Sources to read next

McKinsey Global Institute - Workforce in Motion: Skills and Pathways to Future Jobs in the United States
This Emerald resource turns source material and Emerald coaching guidance into a practical worksheet. It does not republish the report PDF. Use your own real facts, numbers, and work examples.