jeli

The Calibration document is used as a high-level overview of the investigation to date that enables an investigation team and/or learning review participants to "get on the same page" about what happened during the incident and what learnings emerged. It follows a similar format to the final report to allow it to serve as the building blocks for the first draft

Incident Name

(link Incident Name to parent ticket)
Date &/or identifying details
Incident Responders
Investigator name

Narrative Description

This section should serve as a summary of what happened. It will be the 1-2 min introduction you will use to orient the meeting attendees.

Investigation process

Include steps completed and data reviewed to date
Interviews conducted (you may choose to use numbers or the names of participants)

Meeting Facilitation Flow

Use this section to show the high level agenda for the meeting and describe how you will facilitate the learning review meeting to help the Calibration document reviewers prepare for the discussion. Note anywhere you plan to call on reviewers to add context so no one is caught off-guard. You'll prioritize the findings and themes you want to ensure get shared but allow the conversation to evolve.

Timeline

Include screenshots or text of your timeline.

Event

Use this section to provide a more detailed description of the incident. This description should include a high level overview of the triggering event(s), contributing factors and *customer impact. If there is additional time after the discussion of themes, these can be elaborated on using the information provided below in Additional Context.*

Prioritized Takeaways/Themes/Questions

This section captures the themes from your investigations. For your review meeting you will likely not be able to cover all the findings so we suggest having prioritized themes and, as 'stretch goals' secondary themes. Manage your time to ensure adequate discussion of your prioritized themes with time allocated to stretch goals if available. Enable your reviewers to see all the findings and suggest re-prioritization if needed.

Prioritized themes

1.

2.

3.

Secondary themes

4.

5.

...

Proposed Follow-up Items

These may get captured during the interviews or meeting as suggestions. A skilled facilitator will hold off any discussion on action items until the end of the call and/or will schedule a follow up meeting to discuss next steps. Anything raised during the call can get captured here.

Additional Context:

Customer/Employee Impact (if any)

Where? How much? Who was impacted? In what way? Which KPI was impacted? (If there was a UI interaction involved here, screenshots are helpful!)

Trigger

The trigger is typically innocuous (not harmful on its own), and makes the vulnerabilities (from contributors/enablers) combine and lead to an event. Ex: The 'rollback button was pushed and several users couldn't access their workspaces'. In this example, pressing the rollback button would be the trigger, but pressing the rollback button on its own, wouldn't be something that is typically a vulnerability.

Contributors/Enablers

This is a narrative surrounding things that had to be true for the incident to occur; it is likely there are several and some may not have clear relationships to one another. Do not think of these as "causes" or people involved. Contributors and enablers create vulnerabilities that have remained latent in the system (sometimes for long periods of time!).

Risks

Did the incident reveal any risks in system or component design or highlight that the risks are more severe than we anticipated?

Mitigators

What did we do to fix the anomaly? What went well in the system? What went well in the moment? This can include: things that were already baked into the system, actions taken, how were they decided, people being available, processes working, etc.

Difficulties during handling

What happened in the moment of triaging that made things more difficult? Were people easy to get a hold of? Did people know who to page? Did people paged know what to do? Were roles clear, of who was doing what? Was anyone brought in that wasn't explicitly on-call? If so, why did we need this particular person?

Resources

Any other things that relate to this incident: link to the investigation in Jeli, docs, Slack conversations outside of the incident channel, related PRs, other relevant incidents, other 'how we got here' docs, etc.