

BLAMELESS Post-Mortems

...and how to do them

VictorOps



“

Reprimanding bad apples may seem like a quick and rewarding fix, but it's like peeing in your pants. You feel relieved and perhaps even nice and warm for a little while, but then it gets cold and uncomfortable. And you look like a fool.”

From *The Field Guide to Understanding Human Error*
by Sidney Dekker



sidneydekker.com



The bad apple theory assumes that a system is inherently safe if not for the pesky human.

A blameless company is saying that our systems are NOT inherently safe and humans are doing the best they can to keep them running.

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TIPS

for holding a more productive
(and perhaps even blameless)
post-mortem:

01

STEP

REMEMBER the 3 R's

REGRET

- + start out by acknowledging the problem and apologizing for what happened
- + empathy for both the customers affected by the outage and for the person who was involved in the firefight

REASON

- + this should include everything from initial incident detection to resolution
- + the more details you can provide, the better
- + there's no point in hiding facts

REMEDY

- + make sure your remediation items are SMART (Specific Measurable Agreeable Realistic Timebound)
- + it's okay if you don't know the remedy - but you should be committed to continuing the investigation
- + you need to communicate (internally & with your customers) that you're working on improving the situation and that you have an idea of what needs to be done to prevent future outages

02

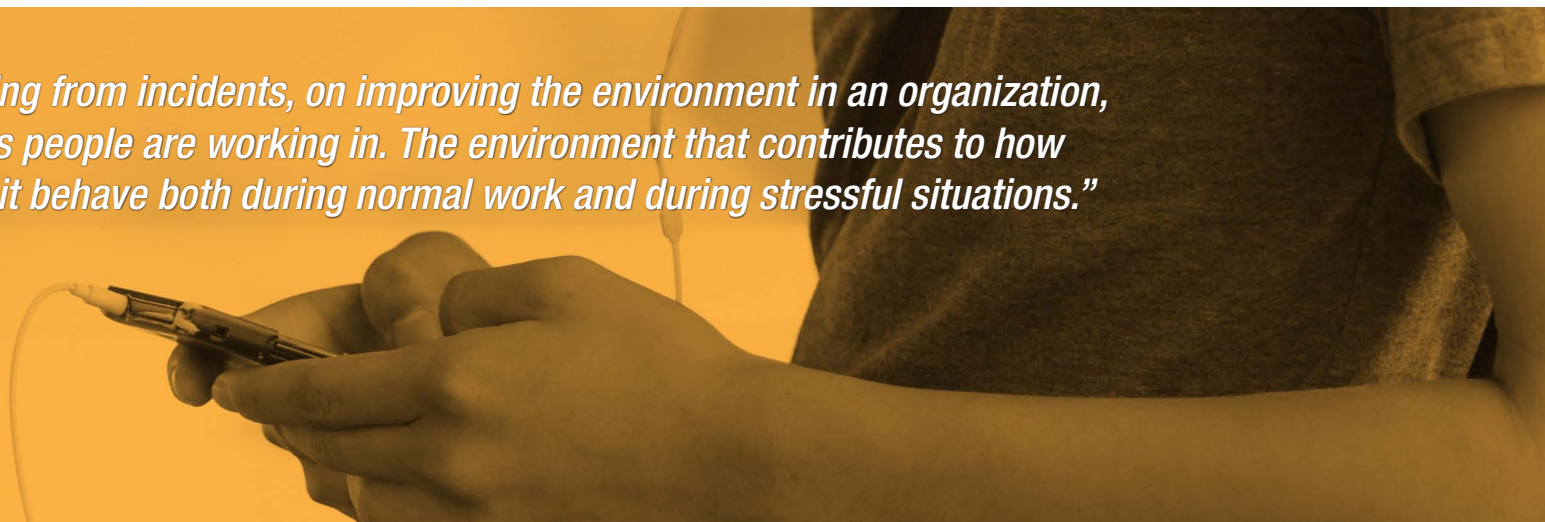
STEP

CHANGE the Focus
of the Outage.

Are you focusing on Mean Time To Resolution (MTTR) or Mean Time Between Failure (MTBF)? You're probably thinking too much about acronyms and not enough about the bigger picture. Changing how you view failure is something that must be done if you want to improve over time.

As Mathias Meyer puts it...

“ *We focus on learning from incidents, on improving the environment in an organization, the environment its people are working in. The environment that contributes to how people working in it behave both during normal work and during stressful situations.*”



03

STEP

STOP looking
for the
Root Cause

Most, if not all, production outages have lots of contributing factors that come into play. Decisions that were made months or years ago can eventually help trigger an issue that no one could foresee at the time. When you add other factors that may or may not be in your control, those decisions can eventually contribute to a production outage.

“Your organization must continually affirm that individuals are *NEVER* the ‘root cause’ of outages.”

- Dave Zwieback



04

STEP

ASK Questions

Post-mortems are a time to be transparent and honest about what went down during the incident. This is not the time to sugarcoat anything or leave out small details.

YOU SHOULD QUESTION:

THE PEOPLE INVOLVED

- + What were the circumstances of their firefight?
- + Were they sleeping when they got the alert?
- + How did the firefight affect them emotionally, physically and mentally?
- + What can be done to improve those circumstances?

THE PROCESS

- + Did the on-call person feel supported?
- + Did they know about the company's escalation policies and have quick access to contact information to bring others in when needed?
- + Was the incident related to the domain expertise of the person on-call?
- + Can anything be changed to the process to make things better before the next incident?

THE AFTERMATH

- + How long did it take the on-call person to recover?
- + What steps were taken immediately after the incident?
- + Is it necessary to communicate the outage with customers?

THE CULTURE

- + Is your on-call system working?
- + Do you need to make changes to your team's on-call schedules?
- + How can you make your culture more open and accepting of failures?

THE NEXT TIME

- + Are you better prepared for the next outage?
- + What steps can be taken so that you are?
- + Is the copy of the postmortem report easily available for anyone to find?

05

STEP

AVOID Punishment

If people feel they're going to be punished for the actions they take during an outage, they are de-incentivized to give details. They won't tell the whole truth and will hide specifics that make them look bad.

An employee's fear of retribution after an incident practically guarantees a repeat of the problem and prevents the team from understanding why actions made sense in the middle of the firefight.

It is imperative to create a sense of safety AND accountability. Mistakes will be made but the person making the mistake should be able to learn from it, not suffer because of it.



AND DON'T FORGET...

“

...the most valuable thing I learned was that blameless applies first and foremost to yourself.”



THE AWESOME

Post-Mortem Framework

01 SET the context.

- + Failure is a normal part of functioning of complex systems. All systems fail, it's just a matter of time.
- + The purpose of the postmortem is to learn. No one will be blamed, shamed or punished for providing an account of what happened. Blame-free does not mean accountability-free. In fact, blame-free postmortems are the only way to collect full accounts of what happened.
- + Remind participants that during the postmortem they will be under the influence of cognitive biases. The most common ones are hindsight, outcome, and recency biases; and fundamental attribution error. We may not notice that we're under the influence, so request—and give permission—for biases to be called out during the postmortem.

02 BUILD a timeline.

- + We want to understand what happened from the perspective of the individuals involved: what did they know, when, and why it made sense?
- + Describe what happened, don't explain.
- + The more diverse points of view that you can collect, the fuller the picture of the incident. Encourage and note divergent and dissenting opinions.
- + As the facilitator, your job is to “listen to discover and verify by synthesizing”.

03 DETERMINE & PRIORITIZE remediation items

04 PUBLISH the postmortem write-up as widely as possible

POST-MORTEM

Checklist - The Basics:

- ☐ Document your timeline or log data
- ☐ Document conversations
- ☐ Leave room for notes
- ☐ Mean Time to Resolution / other time calculations
- ☐ Level of severity
- ☐ Archive it for historical retrieval
- ☐ Remediation - make it actionable

ADDITIONAL Resources

VictorOps post-mortem reporting feature - http://victorops.force.com/knowledgebase/articles/Getting_Started/Post-Mortem-Reports/

<http://www.paperplanes.de/2014/6/20/what-blameless-postmortem-taught-me.html>

<http://www.slideshare.net/jhand2/its-not-your-fault-blameless-post-mortems>

<http://codeascraft.com/2012/05/22/blameless-postmortems/>

<http://www.slideshare.net/fattofatt/post-mortem-report>

<http://www.cdlib.org/cdinfo/2010/11/17/the-project-post-mortem-a-valuable-tool-for-continuous-improvement/>

<https://speakerdeck.com/indec/fallible-humans-dealing-with-failure-in-the-absence-of-scapegoats>

<http://tech.blog.box.com/2014/08/a-tale-of-postmortems/>

[The Field Guide to Understanding Human Error, Sidney Dekker](#)

[The Human Side of Postmortems, Dave Zwieback](#)

