



8IGHT DRIVERS® Operational Excellence Incident Reporting Readiness

Topic	Yes	No	Due Date	Comments
Definitions				
Establish companywide definitions for incidents, near misses and non conformance				
Established companywide definitions for team member titles & roles				
Resources				
Investigation team member roles defined				
Training requirements defined for all team member types				
Training program(s) established by team member type				
Methodology				
Methodology flow chart				
Report template established including format and expected content of the findings report, identification of action owners and completion deadlines				
Mandatory report completion time with a variance process/ approval process				
Company risk definition and ratings matrix				
Authority matrix (approval, rejection etc)				
Process to preserve evidence in the event of serious incidents				
Review team & frequency				
Action items Tracking and closure process established				
Review team meetings established				
Closure process established				



8IGHT DRIVERS® Operational Excellence Incident Reporting Readiness Checklist

Topic	Yes	No	Due Date	Comments
Definitions				
Function				
Nature of investigation				
Degree of seriousness				
Resources				
Size and composition of the teams to carry out the investigation				
Need for independent team members?				
All team members trained?				
Outstanding training required?				
Methodology				
Incident reported to Executive Team?				
Methodology flowchart and reporting templates submitted to investigation team?				
Completion timeline established, approved and communicated?				
Actions identified and taken beyond the site of the incident?				
Incident specific authority matrix completed and distributed?				
Evidence preservation process issued?				
Action items Tracking and closure process established				
Review team meetings established?				
Closure process distributed?				