



CS-04

Engineering Leadership

Investigation Skills for Practitioners

Provides any manager with the need to conduct investigations with the skills required to ensure investigations are accurate and effective

Why this course?

Good investigations are a vital life-blood of corporate knowledge in terms of accidents and incidents. A well-executed investigation affords an organisation key learning points to prevent similar events in the future. Good investigations at the lower end of the disciplinary stages help secure more solid cases in the later stages. This course gives delegates sound basic investigation techniques; focussed on conduct and maintenance error type incidents.

Key learning points

- ◆ Introduction to investigations, the types of incident and differing investigation levels
- ◆ Understanding risk
- ◆ Human performance and the link to maintenance incidents
- ◆ Gathering and preserving evidence
- ◆ The interview, how to set up, prepare and conduct the interview with note taking
- ◆ Logical analysis and keeping an unbiased approach
- ◆ Report writing, presenting findings and good recommendations
- ◆ Practice investigation

Who should attend

- ◆ Depot managers
- ◆ Production managers
- ◆ Planning managers
- ◆ Other junior managers

Duration

2 days, provided at your location and can be provided online



Subject Expertise

We have a proven track-record of reducing maintenance costs, through optimising efficiencies.

Our subject leader is a Chartered Engineer and has worked in Engineering for over 25 years with multi-industry experience.

Our expert team have built this workshop-styled training course through a combination of their significant thought leadership and experience layered with known client situations, bringing a powerful mix of vital real-life examples together with sound theory to all the sessions.

For more information, call us on +44 (0) 7841 029276

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Modular breakdown

Introduction to investigating - In this module we explore why we investigate incidents. We consider the different perspectives in the investigation, understand what business insurance covers and doesn't. We discuss the role of the investigator, who is best placed to investigate and introduce the concept of evidence collection and have a worked example to develop an understanding of facts.

Type of incident - This module considers the different types of incident that we might be required to deliver. We range the delegates through a 'near-miss' and understand the value these have in preventing incidents, exploring the managers role in encouraging this reporting; then we move through slips trips and falls and into more serious incidents including the fatal incident. We discuss the RIDDOR requirements in this module.

Understanding risk - A basic understanding of risk is a very helpful tool for an investigator to hold. This module introduces the concept of risk and assessing risk, and also explores the risk mitigation that can be afforded through effective investigation. We expand on the impact risk management can have on business top line.



Gathering evidence - This module introduces the delegate to methods of collecting and preserving evidence. We discuss the interview, the set up and the collection of notes, and explore the approach that the investigator must take in the interview. We consider photographic evidence and the importance of date stamps. Concluding the module by considering note taking and how we store and file these. This also introduces GDPR.

The investigation - This module is fairly short and brings together the days techniques. In here we will introduce any documents and methods your company use to record evidence and investigation notes, together with any software you specifically use. We introduce checklist and spend time considering questioning techniques during the interview, and how to set up the interview room/location. The module concludes by looking at reporting and building a model report that has value into the future.

Desktop exercise - This final module we split the delegate groups into two and they undertake a 'real' play investigation. They have access to evidence (if they ask), they have the chance to interview people involved. Concluding with an outline report generation.

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Course Specification

Key skills learnt –

- The investigation flowchart - choosing the right level of investigation.
- Legal obligations in rail and aviation as applicable
- Event reporting
- Investigator attributes
- Initial response to incidents and the collection of perishable evidence
- Understanding risk and the link to recommendations and investigation depth
- Human performance and the causation likelihood in incidents and maintenance error investigations
- Drilling to root causes, how and why
- Incident factors
- Introduction to a fair culture
- On day 2 we work through a real case study - from your industry (relatable)
- Gathering evidence, understanding factual correctness
- Challenging personal bias
- Working as part of an investigation team on larger investigations
- Effective scope
- Preserving evidence
- Interviewing skills - setup, unusual witnesses, body language
- Enhanced cognitive interviewing techniques
- Questioning techniques
- Managing the remote interview
- Facts to findings to conclusions to recommendations
- Report writing
- Effective recommendations
- The disciplinary investigation



EngPro Approach –

- ◆ This course is best delivered on-site in a face to face manner, with walls plastered in flip charts
- ◆ We use the behaviour matrix above extensively
- ◆ Cohort size is between 9 to 12, but can be extended in some circumstances
- ◆ All instructors are leadership experts and have extensive experience leading engineering teams
- ◆ As such, we relate to the delegates well and this allows a free and open discussion
- ◆ eCertificates of attendance can be provided
- ◆ And if required, a test and 'pass' certificate can be provided to demonstrate competence
- ◆ On completion of a training series we provide executive level feedback on overall performance

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