RFC - Investigation: TEMPLATE

This is an RFC Investigation template to be used by Systems, Martech, Ops and others when requesting resources on an investigation.

Date Opened: MM.DD.YYYY

Admin Investigation Owner: *// Name of the single person responsible for this investigation. This is the person who is investigating the issue.*

Responsible / Accountable: *// Names of the people who have been assigned as being accountable to this person.*

Consulted: *// Various parties who need to be consulted to triage the issue.*

Informed: *// People who need to be kept up to date about the progress of this investigation. Should include the exec sponsor for this investigation.*

Slack Channel: #investigation-XXXX

Reviewed By: *// Once the investigation document is completed, it should be reviewed by Systems, Data, or another appropriate party for setting clear next steps.*

❗ *Investigations can be rejected or requested for follow up details if they lack sufficient information.*

⚠️ Problem Statement

In two to three bullets points, describe what the problem is.

- Text
- Text
- Text

🔬 Discovery & Timeline

In a few sentences, address the following questions:

1. Who discovered the problem?
2. Was there a singular event or time that the issue arose?
3. What has happened since discovery?

⛔ Problem or Investigation

- Problem statement text
- Problem statement text
- Problem statement text

In this section you should attempt to provide as clear and detailed as possible a thorough understanding of the problem. Try to keep things bulleted just to the points that matter.

General Guidelines

When discussing data elements, please describe precisely the data term and the tool you're talking about.

✅ **Good Example:** "On November 3rd, something happened, causing an abrupt decrease in the Segment event `Email Form Submitted`, which ultimately seems to be

impacting the SFDC Object, Opportunities (as reference in Snowflake, opportunities.dim table)"

In this text, you should include links to the things that you are viewing so that another investigator can come exactly to the things you are analyzing.

❓Hypotheses & Diagnosis Sequence

Systems: tool impacted (Segment, Hubspot, SFDC, Snowflake)

Funnel: TOFU, BOFU

Once you've laid out the owners, the problem and all the details, you should write a comprehensive list of the things that you believe may be causing the problem.

If you don't have enough systems or data knowledge to know, you should schedule time with the right systems person to come up with a thorough list of hypotheses.

Slack can be a great way to learn, but ultimately, in order to keep the investigation structured and drive towards a clear outcome, you should write your hypotheses in the investigation document.

You should try to group your hypothesis into clear structures to make it easy to add, and draw conclusions.

Last, you should use symbols, emojis or colors to denote the status of each hypothesis.

Hypothesis 1 | STATUS

Hypothesis: Text

Supporting Facts & Commentary: Text

Hypothesis 2 | STATUS

Hypothesis: Text

Supporting Facts & Commentary: Text

Hypothesis 3 | STATUS

Hypothesis: Text

Supporting Facts & Commentary: Text

OTHER PENDING HYPOTHESES

Hypothesis: Text

Supporting Facts & Commentary: Text

🧠 Conclusions & Outcomes

Once the root cause or issue has been identified, you can use this space to capture the findings for what drove the issue, and propose next steps.

Ideally, work to fix the issue is done rapidly once the hypothesis is proven, and then we deploy work to fix the issue. This section captures this in detail, and includes references to work, Slack notes, Github PRs or other details that highlight "what was done".

If a backfill of data is recommended for this investigation, you should file a ticket with the systems team for a data backfill.

🌟 **Investigations and backfills are separate processes.**

Findings & Conclusion

- Text

- Text
- Text

Final Steps

- Text & Asana/Linear Link
- Text & Asana/Linear Link
- Text & Asana/Linear Link

📊 Proposed Impact

Based on what you know, you should try to describe the business impact. As much as possible avoid making assumptions that might weigh the worth of the investigation in one way or the other. Try to focus on the discrete data elements impacted and mention them explicitly.

- Text
- Text
- Text

📓 Appendix

The appendix is a great place for artifacts that may be created in the investigatory process. A simple bullet list of the items with a short sentence and a link is usually enough. Likewise, if hypothesis require their own or additional documents, you can place them here.

- Artifact | Link
- Artifact | Link

- Artifact | Link