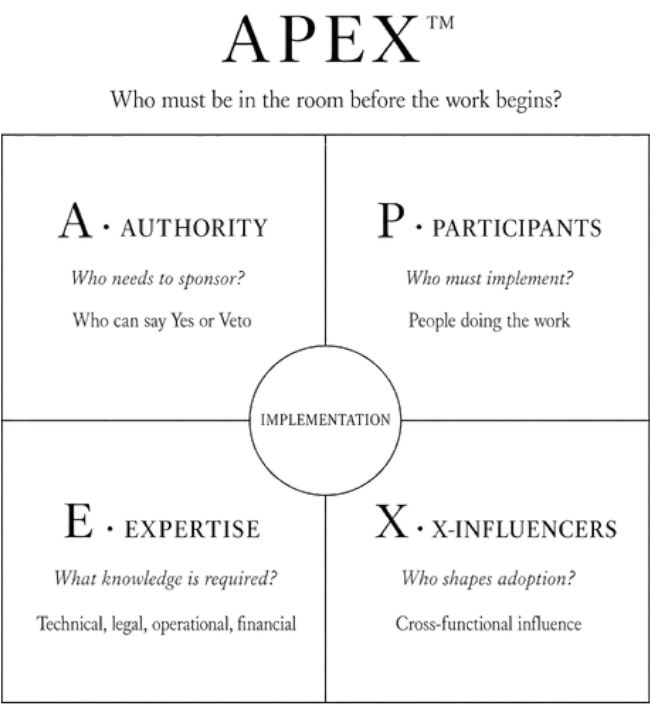


APEX Quick Reference

A checklist — not a model — run before any problem-solving cycle starts.



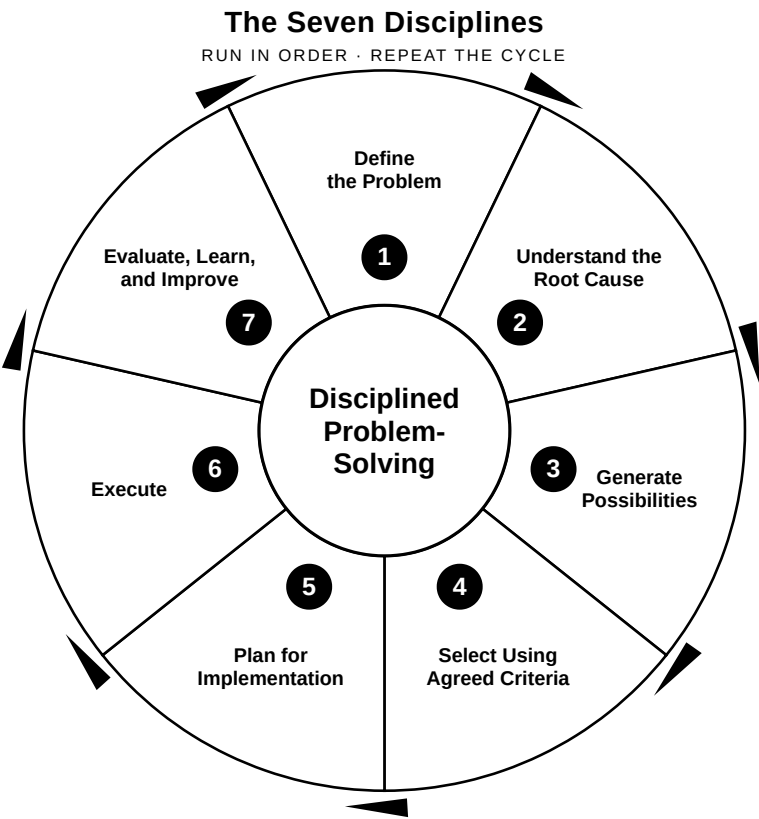
Implementation succeeds when the right people shape the decision.

Missing letters become implementation failures.

Letter	The question	Miss it and...
A — Authority	Who can approve the decision and commit the resources, or veto it? Has the sponsor declared step back or step in, with constraints in writing?	The team’s best work gets overturned at the end, and trust breaks.
P — Participants	Who implements this? They can engage in feedback and enhancement — or openly resist and quietly sabotage.	Implementation meets the resistance you never invited into the room.
E — Expertise	What does the work require? Workflow knowledge first, then compliance, legal, technical, functional.	A confident solution collides with a constraint someone knew about all along.
X — X-Influencers	Whose cross-functional, cross-system influence — popularity, credibility, political weight — reaches into this work from outside it?	The solution is sound and still gets buried.

Run the check up front and you surface, while you can still act, the people whose absence would sink the solution at implementation. Skip it and you find them anyway, at the worst possible moment and at great cost.

 The Disciplined Problem-Solving Process Quick Reference



Discipline	What it protects you from	If you do only one thing
1. Define the problem	Solving the wrong thing	Do not leave the room until everyone can state the problem in the same words — no cause, no blame, no solution hiding inside it.
2. Understand the root cause	Treating symptoms or assumptions as true causes	Ask what evidence would change your assumptions, then go find it. Stay longer than feels comfortable.
3. Generate possibilities	Premature convergence	Protect generation from evaluation. Different jobs; never at the same time.
4. Select using agreed criteria	Power-based decisions and choices that contradict purpose, values, or customers	Agree on what “good” means before you start choosing. No criteria, no decision.
5. Plan for implementation	A good solution that goes nowhere	Before the meeting ends, name who owns the next action and what success looks like. Every time.
6. Execute	A plan that stalls on first contact with reality	Stay with the plan long enough to learn whether it works. Adjust in motion; do not re-decide.
7. Evaluate, learn, improve	Paying for the same lesson twice	Run the retrospective on the process, not just the solution. File the record.