Affinity Diagram How-to Guide

Use this How-to Guide to complete the Affinity Diagram.

Purpose

The purpose of the Affinity Diagram is to group facts, opinions, and other relevant points into related categories to uncover themes or help to clarify a complex scenario. Affinity is defined as "likeness based on relationship or causal connection," and the goal of an affinity diagram is to create a few broad categories into which you can organize all the potential ideas.

When to Use an Affinity Diagram

The Affinity Diagram can be used at any time during the brainstorming and the Assessment phase of the RAPID methodology.

How to Use an Affinity Diagram

Complete the following steps to create an Affinity Diagram.

1. Determine the goal of the Affinity Diagram. For example, the group may want to discover ideas related to:
    - Types of problem or defect
    - Ways to improve a product, process, or service
    - Desirable traits of an improved process
    - Potential performance indicators
2. Using Post-It notes, ask each participant to individually come up with a list of ideas related to the goal of the exercise.
3. Put everyone's Post-It notes onto a whiteboard or flipchart.
4. Ask all the participants to silently categorize ideas into similar groups by moving the Post-It notes into clusters.
5. Working as a team, create "Header" labels for each category. Sub-headers may be created to break down the categories further.
6. Discuss with participants how the patterns will influence actions or project goals.
7. (Optional) Put the resulting categories and ideas into a spreadsheet (see Tips below for sample).

Tips

- The goal for the Affinity Diagram may result from gathering ideas from interviews, surveys, existing records, or previous brainstorming sessions.
- Themes or categories may be broken down further into sub-themes or sub-categories.
- Ideas categorized from creating the Affinity Diagram can be used to improve decision-making regarding the brainstorming and development of solutions.
- Sample follows (with the goal of answering the question, "Why is customer service sub-standard?"):

Headers		Human Resources Issues	Lack of standard processes and measurements	Workplace Culture	Resources
	Ideas	Too much turnover	No standard systems	Insufficient management support	There aren't enough phone lines
	Ideas	Untrained staff	No metric for what constitutes good or poor service	Staff feel unappreciated	
	Ideas	Staff aren't compensated enough		Staff morale is low	

References

George, M. L., Rowlands, D., Price, M., & Maxey, J. (2005). *The Lean Six Sigma Pocket Toolbook.* New York, NY: McGraw-Hill.

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