

Welcome to Module 6, The Art of Investigation and Research. We're going to start with Lesson 1, Why is the investigative method so important? Well, as practitioners and coaches, we don't have a crystal ball. While we can understand biochemistry, we can never truly see all that is biochemically happening within an individual body. What we can do, though, is we can get clues and we can rely on data from other experts in various fields. When it comes to investigation, there is a certain strategy that's been developed and it's useful in many different ways and for different reasons of insight. Now, I found an article that I included in this lesson. And this article comes from a publication called EHS Today.

Now, this is a site for safety professionals. And as I read through their investigation steps, I began to see a distinct correlation between their investigation steps to an incident, you know, that might happen in a workplace, and those that we use with our clients. So let's walk through these steps. I'm going to read each one, and then we're going to see the correlation between that and the steps that we take to investigate with a client. So step one, immediate action.

In the event of an incident, immediate action to be taken may include making the area safe, preserving the scene, and notifying relevant parties. The investigation begins even at this early stage by collecting perishable evidence. We can see here that when we begin with a new client, our investigation starts immediately too. We're gathering information about the client history, the timeline, their symptoms, all the data that we collected on their intake forms, and we're starting to build out a picture based on the incident or the symptoms of the client and understanding what the dysfunction is in their health.

Step 2. Plan the investigation. Planning ensures that the investigation is systematic and complete. What resources will be required? Who will be involved? How long will the investigation take? For severe or complex incidents, an investigation team will be more effective than a single investigator. Now I found this one interesting because when we talk about chronic illness as a severe or complex incident, we know that sometimes these clients, they have a team of doctors.

And in some cases, this can be extremely beneficial because they are supported on all sides. And as that support happens, and we're helping them to discover how to build their health up, this can alleviate some of the support that may be needed elsewhere. Now, it also starts out with planning, and we do have to plan the investigation. from session to session without understanding the strategy that we are using to dig deeper to find that root cause. What resources will be required? Who will be involved? Well that's going to be you and the client. That is who is involved. How long will the investigation take? It will take as long as the body needs to heal? What resources will be required? The resources of basic question asking is going to be one. Another resource would be testing. So we can see that this adds to that planning strategy of the investigation to keep it systematic. Step three, data collection.

Information about the incident is available from numerous sources, not only people involved or witnesses to the event, but also from equipment, documents, and the scene of the incident. Now doesn't that sound identical to what we do? We are sending forms to clients. We're asking them to complete the forms and to give us data about what is happening with them so that we can see the whole picture. We are using data collected from testing results to add to that picture.

The scene of the incident is telling us about the symptoms and so we collect data in that respect as well. Now once we have the data collected, we move into step four, data analysis. Typically, an incident is not just a single event, but a chain of events. The sequence of events needs to be understood before identifying why the incident happened. When asking why, we need to identify the root and underlying causes, as well as the direct causes. Failures and mistakes don't just happen by themselves. Organizations allow error-enforcing environments that encourage direct causes to develop and persist. Such environments, and the basic management failings behind them, are the

root causes, the ultimate source of the incident.

While human error plays a part in the majority of incidents. People are not generally stupid, lazy, forgetful, or willfully negligent. Human errors occur because of influencing factors associated with the work, the environment, an individual's mental or physical abilities, the organization and its management systems. Any investigation which sets out to find someone to blame is misguided. And I think this really does a fabulous job of covering what we do in our investigation and the whole principle behind asking why. Now they start off with telling us that an incident is not just a single event, but it's a chain of events.

And that's usually where we find the client when they come to us. A chain of events has happened, meaning that symptoms may have started early on, a symptom here, a symptom there, and as they aged, these symptoms became greater until they reached a certain place, usually a pain point, where the client felt like they had to address their health issues. The sequence of events, meaning the timeline that we use, the timeline form that gathers data about events and symptoms and the correlation between the two and the picture of how they have grown over the last years from birth to now. Now it also says when asking why we need to identify the root and the underlying causes. And I found that interesting because that is the same terminology that we use.

And that is what we're doing when we keep asking that question of why. Now they note that failures and mistakes don't just happen by themselves. It could be a product of the environment. And that's one of the things that we talk strongly about. Diet, lifestyle, and environment. These are the things that impact the function of the body. Step five, corrective actions. Many investigations make the mistake of raising actions which deal only with the direct causes. A quick fix, putting last lines of defense back in place. By ignoring the root and underlying causes, not only do they miss an opportunity to reduce the risk of recurrence of the incident, but they also leave open the possibility that other dissimilar incidents may also occur, arising from the same common root cause.

Exactly this. When we are looking for that root cause, we're trying to find the thing or things that are creating symptoms, dysfunction, and balance within a body. A quick fix, a supplement thrown at a symptom, ignores the root cause or the underlying cause. And as they have stated, by doing this, we leave open that possibility that more incidents will occur because we have not addressed the root cause and we have only addressed the symptomology. Step 6. Reporting. The investigation is concluded when all outstanding issues have been closed out and the findings have been communicated so that lessons can be shared. Communication mechanisms include formal incident investigation reports, alerts, presentations, and meeting topics.

Checklists, pro formas, and posters can be useful when setting terms of reference, collecting, and structuring information and analyzing causes. And this is exactly what we do along the way. We know that when our client is able to reach a certain level of health, they're ready to go out on their own and then practice with the tools that we've given them so that they can maintain that healthy atmosphere. We do use things in communication mechanisms, such as the articles that we share with them, taking information that they have given us and structuring it in such a way that we understand it, but so that we can also repeat it back to them in a very simplistic way, so that they understand the steps that they need to take in order to find their healing environment. Now when we use this method of investigation, it is tried and true. It's a universal method and why it works so well when we use these principles to discover the deeper causes with clients.

Now stepping into practical thinking or critical thinking I should say, is a direct part of what we're doing by using this investigation strategy. So as a critical thinker will raise questions to unknowns. So the client is giving you different pieces of information that has many different surrounding unknowns to each piece of information. Therefore we must be willing to step out of our comfort zone and to raise the questions that will bring data in that will answer that question plus others. Now the

critical thinker will question any statement that may appear incomplete in order to determine additional details about the event that could change the outcome of or affect the decision to be made based on the statement. The critical thinker will gather and assess all the information and utilize abstract ideas to help come to well-reasoned conclusions while all the time testing these conclusions against the relevant data. The critical thinker will communicate effectively to allow answers to be forthcoming from the client and to inspire additional data to be remembered and then shared.

Before you can ask the question, you have to know why you are asking it. What clue will the data provide? So as a very short example, I eat three times per day. That's the statement. And what does this statement tell you? And then what does it not tell you? I think that that's the even bigger clue to this question of what questions do we ask. So what does it not tell us? It doesn't tell us what you ate. If the statement is I eat three times a day, it doesn't tell us what you ate. It does not tell us how much you ate. It doesn't tell us what connections it might have to poor function within the So, what questions would help me better understand the statement and its relevance to this client's issues? So, let's get into that. Because we're starting out at a really high level, you know, the information that I've just shared with you.

And we're going to come down and look at very strong specifics that you can utilize in your practice. So let's start with this statement, and we're going to work through this statement over the next few minutes. The client's statement to you is, they have fatigue during the day. So here's the questions on which we want to focus. What do we know? What do we know about this statement? Well, we know that no matter what the client has told us about this symptom, we know that it can be a symptom with many causes. There's many different causes that can overlap and tied to the symptom in this case, specifically, of fatigue.

Another thing that we want to know is, what are our foundational health basic reasons for why this fatigue may be happening? So going back to the foundational health chart, we look at hydration, we look at elimination and digestion. And we know that in each one of these, there exists the possibility of fatigue. So we don't have to look at a hundred different reasons why this person might have fatigue. But if we start right here and say, okay, how does this symptom, this complaint of the client, how does it fit in with our foundational health chart? The next question is, is the statement accurately ambiguous?

So saying, I have fatigue during the day, it leads us to believe that fatigue is present all day. And that's just merely an assumption unless we ask. The client doesn't always know how to tell you what's going on or the importance of these specific details that we need. So understand when you are reading a statement about a symptom or a complaint. It is always accurately ambiguous. It does not tell us everything that we need to know about it. So what other questions of inquiry would tell us more? All right, let's go through these. When does it happen? Now this could help us relate it to a particular time of day.

It could help us relate this to food or what they are eating. We could relate this to not sleeping well, especially if we discover that they're tired in the morning but they use caffeine as a boost and then later on in the afternoon they're crashing. They might view that as ignoring the morning tiredness because they have coffee and only focusing or only seeing that afternoon crash. So they might say to you, yes I only have fatigue in the afternoon. Again that is accurately ambiguous. It's a true statement but it is not complete. So this is why we have to dig down into these minute details so that we can get as close to the client picture in our head and on our paperwork as we possibly can.

Another question of inquiry would be how often does it happen? Is it daily as opposed to occasionally? If daily, are some days worse or better than others? If this client works during the week, do they feel that they have this fatigue show up on the weekend? And that's one thing to

always keep in mind, the weekend or whatever the weekend is for that client, whatever day is off, it seems to alter a lot of symptoms for clients. And this can relate to several things, especially stress or a reduced stress because they are not at work. So we have to compare the two. What could correlate with it happening?

So ask the client. They are the ones who will give you the answers because they are the ones that have all the answers. So we asked that client, have you seen any correlations to why you are fatigued and what you're eating or your lifestyle? I had one client that couldn't sleep, couldn't sleep, couldn't sleep we tried several different things did sleeping hygiene and tried a couple different supplements worked on inflammation I mean we did everything and she told me she said yeah I traveled out of town this week and the best sleep I've ever had and I said you slept all week yeah I slept all night? Yes, I did. Did you take any supplements? No, nothing. I said, now, what's the difference? What happens at your house that didn't happen while you were away sleeping in a hotel? And for a long time, she she just couldn't tell me. But ultimately, what it was, she allowed her dogs to sleep with her. And they would continually wake her up. This was it. The dogs were the root cause. Healing quickly escalated after we figured this out and they were sent to their crates to sleep at night.

Now when we say a statement from a symptom, so this client says I have fatigue during the day. We have to ask, how is it connected to other factors and or to the root cause that we don't necessarily know right now? Well we have to make some assumptions based on the foundational health chart and based on what we know about the client. So, here are some assumptions that we could make about a client who says they have fatigue during the day. It could be their diet. It could be low nutrients, either from diet or digestion. It could be lack of sleep or poor sleep, such as if they have bathroom trips or just waking up several times during the night.

It could be dehydration. Now, dehydration can cause poor sleep, but dehydration is also caused by poor sleep. I mean, this is a pretty important vicious cycle to explore with your client. Now, going over every piece of data that we're collecting, we have to ask too, are there any fallacies in the reasoning? You know, because we want to be solid on our reasoning and not lean one way or another, just accept the data for what it is.

How good is the evidence? Well, it's only as good as our questions. I mean, the evidence might be there, but if we don't ask about it, we won't know about it. So we try a couple things with our clients just to see how good our evidence really is. So we use the Food and Mood Journal and we don't see any correlation or connection to the macronutrients or the timing of food. We look at hydration and working on hydration seems to help somewhat. They mention that they have several gut symptoms, so digestion and nutrients could be a bigger factor here. Now these are just assumptions.

They do have poor sleep and low amino acids are going to be a really strong consideration. We're already looking at low nutrients. So if we incorporate better hydration and sleep hygiene and nutrients, how do things change if we focus on all of these items and work with the client over a period of several weeks to see what the outcome might be. Now, I had put a post up and I want to use it as an example and I call this my teaching tip, always investigate. So recently I had a client complain of a couple weeks of strong anxiety throughout the day.

And I had a conversation with him, and it went like this. I asked him, when did this start happening? And the client said, about two weeks ago, and yesterday was the worst. Me, what do you think changed, or what do you think might be causing it? Client, nothing has changed at all. Same schedule, no new supplements. I just don't know why it's happening. Me.

Do you feel it all day long and when is it the strongest? Client. I feel okay in the morning, but it gets worse as the day goes on and it's really bad by the time I get home. Me. So you feel okay in the

morning. Do you notice when it goes away? Client. I start feeling much better before bed.

Me, so after you eat dinner, would you say it goes away? Client, yes. Me, are you eating breakfast and lunch? Client, yes. Me, what are you eating for lunch? Your food journal notes show that you eat salads with a lot of protein. Is that changed or are you still eating that? Client Well, the last couple of weeks I have been on a new project, so not a whole lot of time for a full lunch, but on the days that I don't eat anything, I do have some crackers if I get hungry.

Me Yesterday, you said you had the strongest symptoms for any day over the last two weeks. What did you eat? Client, well, nothing actually until dinner. Okay, so this client, he started eating a full lunch again and he had been, you know, in the course of our conversation, I discovered he had been skipping breakfast as well. And when he did start eating the way he should, the anxiety resolved. That's imperative that we investigate to help our clients understand how these changes can affect function.

Supplements, they have their place in our toolboxes, but not until after we have investigated what's actually happening, and if they are even necessary to support function. So if I had suggested a supplement for anxiety, I would be treating a symptom and that's just not what we do. Instead, it's vital that we help guide our clients to discover their own health needs so that they learn from them and develop the best healing environment possible. Now this client, he valuable lesson. He didn't realize as the anxiety slowly came on and he slowly quit eating. He couldn't see that correlation. I was on the outside. It was easier for me to do that. It was easier for me to ask the questions to discover what was actually happening.

What did he learn? He learned that when he doesn't eat properly, when he doesn't fuel his body with nutrients, it has this effect. It has many effects, but the one that stands out to him is the anxiety. And he will not ever not fuel his body again.