

Blue Line Discovery: Accessing the Unique Operational Intelligence of Your Workforce

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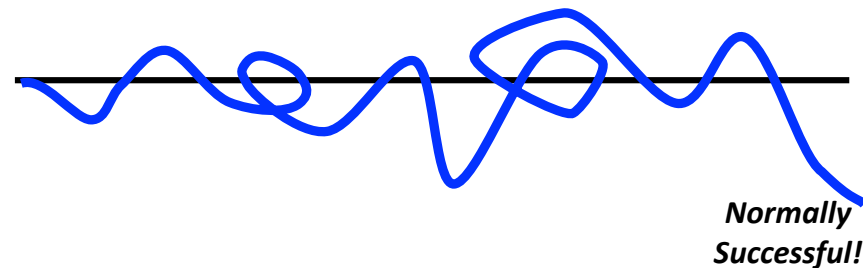
Lisa Brooks, CIE

- Principal at Nexus HSE
- 24 Years in Industry in Various Corporate H&S Roles
 - Alcoa
 - International Paper
 - GE
- 8 Years Leading Global HSE Networks
- Distinctive technical expertise in ergonomics, HOP, and serious and fatal incident prevention
- Life-long Learner

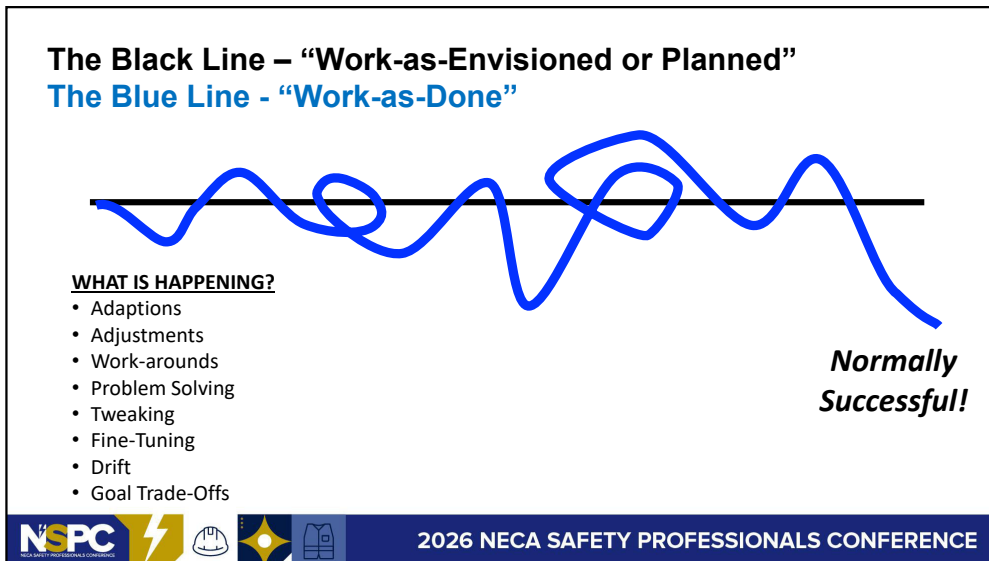
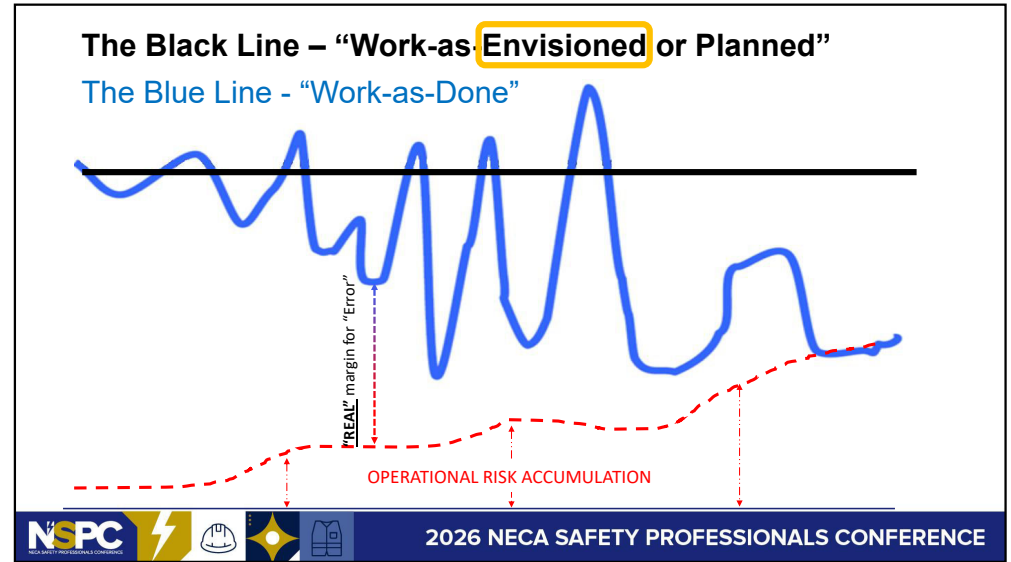
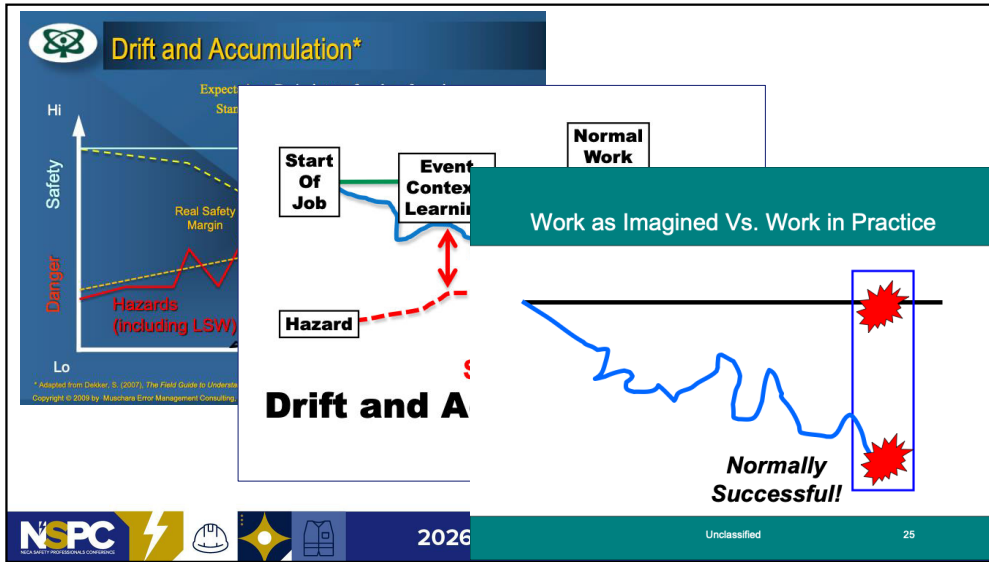


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The Black Line – “Work-as-Envisioned or Planned” The Blue Line - “Work-as-Done”

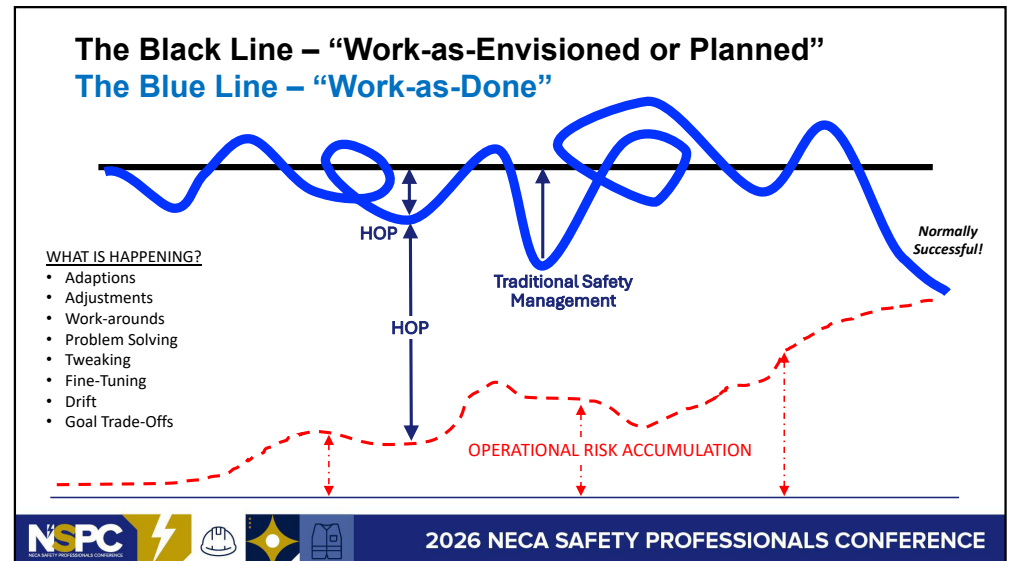


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WHAT IS HAPPENING?

- Adaptions
- Adjustments
- Work-arounds
- Problem Solving
- Tweaking
- Fine-Tuning
- Drift
- Goal Trade-Offs



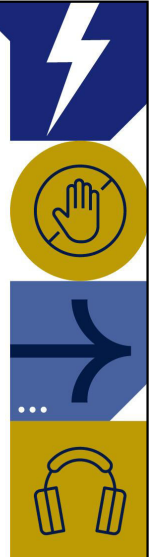
Principles of Human & Organizational Performance

1. Error is **NORMAL**
2. **CONTEXT** drives worker actions, choices, & decisions
3. Leadership's **RESPONSE** [to failure] matters
4. Blame **FIXES** nothing
5. Improvement happens through **LEARNING**



Principles of Human & Organizational Performance

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2. Workers have unique **OPERATIONAL INTELLIGENCE**
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Workers have UNIQUE OPERATIONAL INTELLIGENCE

and are Master Problem-Solvers

Work is dynamic

Workers [nearly always] complete work **successfully**, no matter how it is presented to them...**by adapting**.



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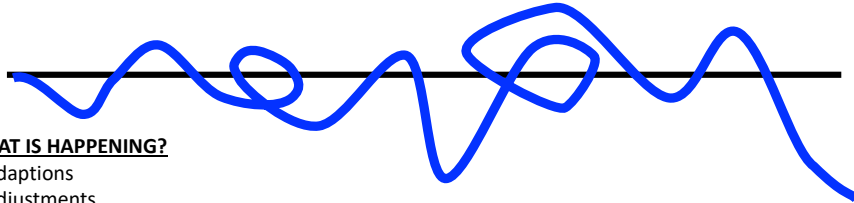
Work Changes Every Day

- All work environments are dynamic
- Procedures are always underspecified
- Workers are expected [and paid] to get the job done
- Workers are experts at adaptive problem-solving
- Planners/Engineers/Leaders are not smarter than workers
- Workers are the "**Masters of the Blue Line**", the **heroes of our workplaces**



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The Black Line – “Work-as-Envisioned or Planned”
The Blue Line - “Work-as-Done”



WHAT IS HAPPENING?

- Adaptions
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Normally Successful!

Local Rationality

People do things that
make sense to them at the time,
under the existing circumstances
(expectations, goals, resources, mindset, culture...),
otherwise, they would not do them!

Psychological Safety

1. Error is **NORMAL**
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4. Leadership's **RESPONSE** [to failure] matters
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*“All of the other things you do, don't really work very well, unless you have **openness and trust.**”*

- Edgar Schein

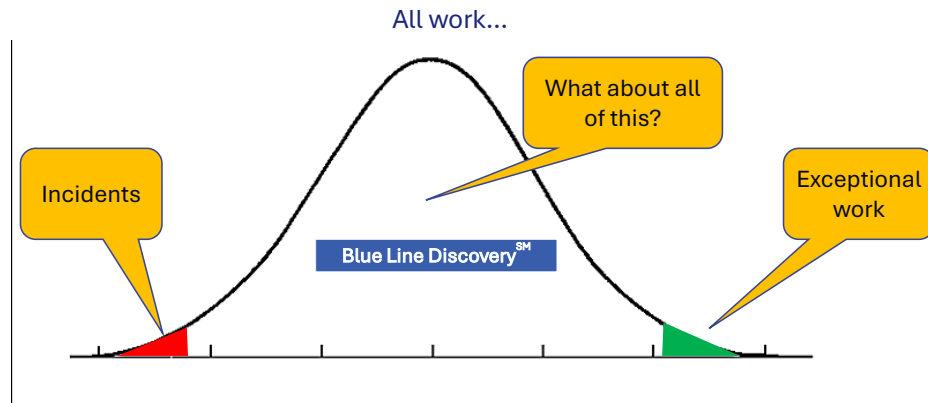
Operationalizing HOP

EARLY IN YOUR HOP JOURNEY

- EVENT REPORTING and RESPONSE
- LEARNING FROM THE “BLUE LINE”

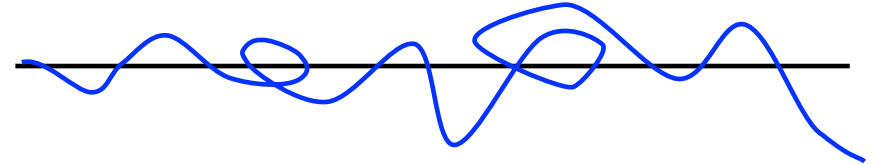
Integration
Deployment

When Do We Learn?



Operational Learning

Understanding and learning about work from where work gets done
Understanding work from the perspective of the worker
Understanding the context behind the **blue line!**



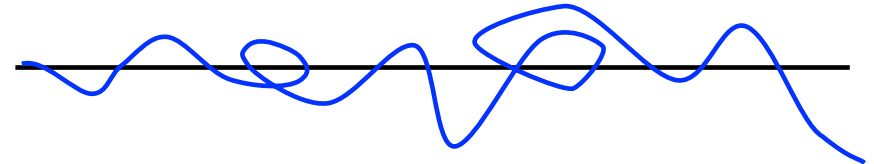
Operational Learning

End Goal

- Acquire a more holistic view of how our processes are working
- Remove unacceptable goal conflicts
- Reduce known error traps
- Expand on what helps create success
- Build stronger and more sustainable defenses to improve the reliability and resilience of our operations

- Bob Edwards
Bob's Guide to Operational Learning

BLUE LINE DISCOVERYSM



BLUE LINE DISCOVERYSM

- Field visits by leaders with the goal of better understanding how work is actually performed
- Provide the opportunity for leaders and field workers to connect
- Allow the organization to learn from workers
- Improve your operations by using workers' practical knowledge to help leaders that make better decisions on their jobs and better able to support their workers
- Is not a tool for judgement.
- Is a way for leaders to demonstrate humble inquiry by asking inquisitive, open-ended questions.

Humble Inquiry



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Humble Inquiry

“Humble Inquiry is the fine art of drawing someone out, of asking questions to which you do not already know the answer, of building a relationship based on curiosity and interest in the other person.”

- Edgar Schein, “Humble Inquiry”



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BLUE LINE DISCOVERYSM

Discuss the 4Ds™ of work, AND the presence and effectiveness of “Defenses” and the “Desirable” state of work according to the workers.

Dumb(founding)	Different	Difficult	Dangerous
<ul style="list-style-type: none"> •What are the silliest or dumbest things you are asked to do? •Are there things you are required to do that <ul style="list-style-type: none"> ▪Do not make sense? ▪Do not add value? 	<ul style="list-style-type: none"> •Is there anything different or unusual about this job or site? •How did the execution of this job compare to how it was scoped? •Did anything surprise you today? 	<ul style="list-style-type: none"> •What are the hardest or most challenging parts of this work? <ul style="list-style-type: none"> ▪Physically? ▪Mentally? ▪Logistically? 	<ul style="list-style-type: none"> •How could you get seriously hurt in this work? •What work practices, controls, or defenses keep you safe? •What do you worry about in this job?

4Ds™ is a trademark of Learning Teams Inc.

BLUE LINE DISCOVERYSM

- BLDs provide an opportunity for leaders to spend time, connect, and **learn** from workers in the work environment.
- BLDs help leaders understand the challenges that workers face and the problem solving, adaptations, adjustments, and work-arounds that workers must apply to successfully complete their work and address the operational variability present that was not fully anticipated and accounted for when the work was planned,



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BLUE LINE DISCOVERYSM

- BLDs make space and provide a framework for a new and different kind of conversation between Leaders and Workers in the field.
- The term DISCOVERY was selected intentionally and deliberately.
 - Discovery implies that new things will be uncovered.
 - Discovery requires leaders to acknowledge that they do not know everything and that they do not have all the answers.
- This is a departure from how leaders have operated and been rewarded in the past.
- BLDs may initially feel different and a little awkward for both Leaders and Workers.



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BLUE LINE DISCOVERYSM

WIN
WIN
WIN



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Questions



Discussion



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Thank You!

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LIFELINE

- If you or someone you know is experiencing a mental health crisis, please reach out to the 988 Suicide & Crisis Lifeline by calling or texting 988, or by chatting online at <https://chat.988lifeline.org/>.
- This free service provides confidential emotional support 24 hours a day, 7 days a week across the United States and its territories.
- You will be connected with trained, compassionate counselors who will listen and support you through whatever challenges you may be facing.



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