Affinity Technique

What is it?
A method for generating and/or organizing verbal data. Affinity means "likeness", so this approach is used to group ideas into clusters or categories based upon their affinity for one another. Typical uses include:

- Generating and organizing ideas about issues related to a problem situation.
- As the input for a Relationship Diagram, to build a non-linear representation of the factors influencing an issue or problem.
- Organizing customer needs information gathered during interviews or observation, or comment data from customer surveys.

How do I use the Affinity Technique to generate and organize information about a problem or issue?

1. Identify the issue or problem for which ideas are needed. One advantage of this method is you don’t need to spend much time exploring it as a group.

   Write an ISSUE question in the form:

   "What are all the factors related to X?" or

   "What are all the ways we could Y?"

2. Clarify roles and ground rules. Identify the team’s Sponsor, i.e., the person with the issue to be addressed by the team. Select participants based upon their expertise, diversity and willingness to think flexibly. For Ground rules, see page 199.

3. On sticky notes, individuals SILENTLY brainstorm answers to the ISSUE question. Allow 10-15 minutes and follow these guidelines.

   Write legibly
   One idea per note
   No talking
   4-7 words per idea

Silence makes the Affinity diagram a very "democratic" process, i.e., less likely to suffer from lack of participation due to the "rank" of those participating, or the presence of a dominant team member.

HINT: A key advantage of the Affinity Technique over Classic Brainstorming is that the generation and grouping of ideas is done SILENTLY.
4. Place stickys on the chart and spend 5-10 minutes SILENTLY forming affinity groups of similar ideas. Create 5-10 groups adjacent to boxes A-J.

   HINT: While grouping the notes, if a sticky is moved more than twice, copy and place it in both groups.

5. Discuss and write labels that capture the essence of each cluster. Labels need not be perfect, but should be at least two words each. (5 minutes).

6. Determine your next steps.

   POINTER: This might include Multi-voting (Chapter 5) to rank the clusters for further investigation, or creating a Relationship Diagram (Chapter 6), to analyze interrelationships between clusters in order to identify the underlying root driver of a system.

   For customer interview data, you might use a Survey (Chapter 7) to get customer data on priorities.

Following is an example. On the page after that is a blank Affinity diagram worksheet.
Following is a (simplified) example of an Affinity Diagram. It has 25 ideas, organized into five affinity groups. Ideas were generated for the following Issue Question:

**Issue** = "What are all the factors related to getting operators to fill their new roles since the redesign of the manufacturing organization?"

- **Training**
  - Don’t know how to do preventive maintenance
  - Mechanics unable to use new diagnostic equipment
  - Operators unskilled in maintenance
  - Don’t understand on-line analyzers

- **Clear Vision for the Redesign**
  - Why did we make this change?
  - Any results yet?
  - Any results yet?
  - Reason for redesign unclear

- **Accountability**
  - Nothing happens if they don’t
  - Foremen don’t make them do it

- **Union Buy-in**
  - Union fears loss of Maintenance jobs
  - Contract prohibits some changes
  - Union unhappy about changes

- **Defined Roles & Responsibilities**
  - Not sure what they should do
  - Roles blurry
  - Jobs between Maintenance and Operators unclear
  - How should Maintenance and Operators work together
  - Nobody told them

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*Excerpt from Chapter 4: Making Ideas*
### Affinity Technique

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<th>Issue:</th>
<th>Sponsor:</th>
<th>Scribe:</th>
<th>Facilitator:</th>
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<td>Date:</td>
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#### Roles

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Excerpt from Chapter 4: Making Ideas