

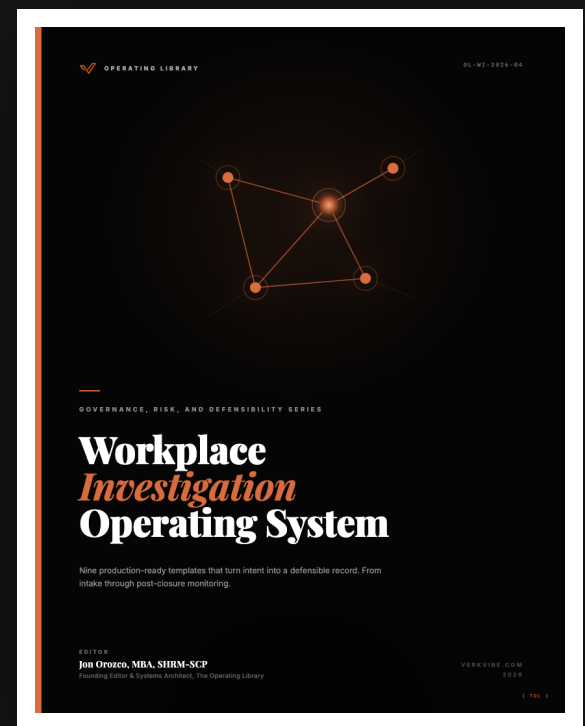
PREVIEW EDITION · THE OPERATING LIBRARY

Workplace Investigation Operating System

The complete five-stage investigation system with triage, witness sequencing, evidence standards, the six-section findings report, and nine ready-to-use templates.

One complete framework, shown in full. The operating system that surrounds it lives inside the volume.

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WORLD-CLASS OPERATING KNOWLEDGE

01

THE PROBLEM THIS REMOVES

02

ONE COMPLETE FRAMEWORK,
IN FULL

03

WHAT THE FULL VOLUME
HOLDS

04

HOW TO OWN IT

THE FRAMEWORK · SHOWN IN FULL

Witness Sequencing: The Required Interview Order

Interview order is not a preference. Departing from this sequence requires documented justification, because the order itself is what makes the findings defensible.

1**1. THE COMPLAINANT**

The opening interview establishes scope and identifies what evidence exists. Twenty minutes is not an interview. This is where you learn what documents, messages, and witnesses the investigation must reach.

2**2. DOCUMENTARY EVIDENCE**

Before the respondent, not after. Message logs, files, access records, and calendar data are pulled and reviewed first. The evidence an investigation did not collect is the evidence that later defeats its findings.

3**3. THE RESPONDENT**

After the evidence review. Interviewing the respondent before you know what the record shows means you cannot test their account against anything, and you will not get a second first interview.

4**4. WITNESSES NAMED BY EITHER PARTY**

Both parties, not just the complainant. Interviewing only one side's witnesses is the single most common structural bias in internal investigations, and it is visible on the face of the file.

5**5. FOLLOW-UP INTERVIEWS**

Only if new information surfaced. Each follow-up is documented with what prompted it, so the record shows the investigation followed evidence rather than a predetermined conclusion.

HOW TO USE IT

Issue the legal hold before contacting any witness. That sequence is not discretionary, and failing to issue a timely hold is spoliation regardless of how sound the rest of the investigation is.

INSIDE THE VOLUME

You just used one. The system has more.

FRAMEWORKS, TOOLS & TEMPLATES INSIDE

- | | |
|---|---|
| + The Five Stages of a Defensible Investigation | + The Triage Decision Framework (five questions) |
| + Timeline standards for each stage | + Interim Protective Measures (four types) |
| + The Six-Section Findings Report | + Credibility assessment factors and their weight |
| + The eleven Investigation Failure Patterns | + The Legal Hold Notice |
| + The Retaliation Monitoring Log | |

AFTER THIS VOLUME YOU CAN

- Triage a complaint in the first 24 hours and know whether it must escalate
- Issue a legal hold before evidence is lost
- Run interviews in an order that survives challenge
- Write findings that state substantiated, unsubstantiated, or inconclusive without hedging
- Monitor for retaliation after closure, which is where many claims actually originate

A defensible investigation is not one that reaches the outcome leadership expected. It is one whose process cannot be challenged. Speed is a political metric, not an investigative one.

START HERE

Workplace Investigation Operating System



THEN READ

Pairs with Vol. 01 (HR Policy Starter Kit) and Vol. 02 (Manager Coaching Scripts)



OWN THE SYSTEM

The Complete Library

OWN THE VOLUME

Workplace Investigation Operating System

HR leaders, compliance leads, fractional CHROs, and operations executives who need internal investigations that hold up under agency or legal scrutiny.

- ☐ Five-stage operating system
- ☐ Nine complete templates
- ☐ Interview guide library with Upjohn and Weingarten protocols
- ☐ Evidence log and chain of custody
- ☐ Eleven documented failure patterns

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MORE THAN ONE FRAMEWORK

The framework you just used is one piece. The volume is the whole operating system.

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PROPRIETARY FRAMEWORKS

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