



# Standard Operating Procedures

## Daily Observation Tour

SOP0005 V3

August 2020

# Standard Operating Procedure

## *Daily Observation Tour*

### Background

Observing is a skill which needs to be developed and practiced. In the workplace it is also necessary to put some structure around how and when to take the time and make good observations that lead to actions. Often when people walk through the shop floor, they think they are being observant but that is rarely the case. To truly observe what is happening around us requires time and a mind-set that we want to see and not be distracted by the other things that take up our time in a busy business environment

### Daily Observation Tour Worksheet

The purpose of a Daily Observation Tour is to make contact with each employee each day in a structured format and to observe what is happening. It is not to stop friendly, normal interaction but to reinforce specific standards while making that contact.

The Daily Observation Tour, at its heart, is a standards review. It shows the employees what is important. It also adds structure to follow-up and communications.

The Daily Observation Tour worksheet is intended to be printed and filled out by hand. The worksheet is intended to be dynamic in that the standards to be observed should change over time and can be specific to different areas of the business. This tool can be used to focus the whole organization to one or more standards as needed.

## Standard Operating Procedure

1. Take a few moments to note any specific safety issues brought up during the previous day as possible Pass-down items. Note these in the Safety section
2. Each day before going on the floor quickly review the previous day's sheets for follow up items. These will be placed in the 'Daily Reminder/Follow-up' section of the sheet.
3. When approaching employees in their work area take a few seconds to just observe before starting a discussion.
4. Take particular note of the list of Standards. These are the focus areas at this time and can be changed or made more detailed as the needs arise.
5. Make notes of the standards observed as a reminder to yourself. This can be used as a check in following weeks to ensure that compliance to that standard is improving
6. If adherence to a specific standard gets to 100% (e.g. proper use of hearing protection) it can be dropped off the daily standards review but should not be eliminated from the list
7. From the Observations made from conversations, determine the top three WINs for the day. (What's important Now) and record in the WIN section
8. Once per week review the Daily sheets to note trends and possible areas for more follow-up or for a change in observed standards.
9. Daily completed sheets should be kept for one month to allow for a review of the trends and then destroyed. These are not employee records, strictly daily reminder.

10. If an items is noted that should be in the employee file (repeated failures) that needs to be recorded as per your organizations HR policy on employee files.
11. A master list of important standards needs to be created and maintained so that the Daily Observation Tour worksheet can be updated from time to time. The intent is that it is dynamic and that at least monthly the standards being observed are changed.

## Outcomes

Routine observations of standards assist in improving adherence to those and other standards. When a leader in an organization makes it a routine to go and observe and comment on compliance to standards than people know that it is important and are more likely to follow those standards. By having a tool like the Daily Observation Tour worksheet, the organization can focus on a few specific standards across the organization or allow each area to focus on what is important to them at this time. Better adherence to standards improves safety, quality and production. This tool can also improve employee communication as both the leader and the supervisor know that there is a set routine to go to each workstation and observe and have a discussion with the employees.

## Sample Daily Observation Tour Worksheet

Please see the following page.

Download the Form at: <https://ssiconsulting.ca/free-tools/>

Please refer to Standard Operating Procedures SOP0005 – Daily Observation Tour at <https://ssiconsulting.ca/free-tools/> for instructions and a completed sample.

**Company Name** *ABC Company*

**Date** *2010-08-14*

**Department** *Maintenance*

**Employee Name** *Fred*

**Performed By** *Sam*

**Safety: Pass-up and Pass-down items**

*Trip hazard - extension cords laying across walk way.*  
*Face shield missing from drill-press.*

**Observations of Standards: What are the key standards to concentrate on right now?**

*Trip & Slip hazards*  
*Hearing protection*  
*Eye Protection*  
*Clean work benches*

*Generally, pretty good compliance except as noted above from yesterday. Both items were addressed and there were no new issues today.*

*Fred suggested getting better cleaning materials for cleaning up oil spills on the floor. New paint on the floor is particularly slippery when oil gets on it.*

**What's Important Now (WINs)**

*Work spaces are very clean.*  
*Potentially unsafe extension cords have been proactively replaced.*

**Daily Reminder / Follow up from Yesterday**

*Trip hazard - extension cord - has been addressed*  
*Face Shield for the drill press - new face shield procured from stores dept.*

**Other Notes**

*Very clean shop. Clear that Fred takes pride in his work space and equipment.*