



# 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 it's 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 an Excel worksheet that is intended to be printed off on 8.5 X 11 sheets and to be 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 during the previous day as possible Pass-down items. Note these in the top 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 bottom 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 insure that compliance to that standard is improving
6. If adherence to a specific standard gets to 100% (eg. proper use of hearing protection) it can be dropped off the daily standards review but should not be eliminated from the list
7. From Observations made of 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 reminders
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 work station and observe and have a discussion with the employees.