

Before You Fix It

A PROCESS OBSERVATION SHEET

Before making any changes, take time to observe how the process actually happens. This sheet will help you capture what you see, hear and notice — so you're working with real insight, not assumptions.

Real change starts with understanding how things *actually* work.

Process / task:

Date observed:

Observed by:

Who was involved:



1. WHAT WAS SUPPOSED TO HAPPEN?

What is the intended process or outcome?



2. WHAT ACTUALLY HAPPENED?

A brief, step-by-step overview of what you saw.



3. WHERE DID PEOPLE HESITATE?

Did anyone pause, double-check, ask for help or seem unsure?



4. WHERE WAS INFORMATION COPIED OR RE-ENTERED?

Did information have to be entered in more than one place?



5. WHAT WORKAROUNDS WERE USED?

Did people find alternative ways to get things done? If so, what and why?



6. WHAT TOOK LONGER THAN IT REASONABLY SHOULD?

Where were the delays or bottlenecks?



7. WHAT HAD TO BE REMEMBERED?

What wasn't prompted by the system or process and relied on people's memory?



8. WHAT WORKED WELL?

What's working smoothly and should be left alone?



9. WHAT HAVE YOU NOTICED (WITHOUT TRYING TO SOLVE IT YET)?

Any other observations, patterns or surprises?