

Go See Worksheet:

Guide to walk through workspaces to observe processes firsthand



Purpose: Use this worksheet to help identify bottlenecks, observe waste, and gather data to support your site's quality improvement (QI) work.

Identify the Go See location:

Take a moment to describe the location in detail, sketch your observations or layout of the area. Some things to consider:

- Are there multiple different areas/locations?
- What area/location will require the visit's focus?

Your Go See may be somewhat virtual, so there may be virtual/electronic system observations to be made as well. If so, be sure to list them in this section

Communicating the why:

During the Go See, take a moment to respectfully and humbly explain your presence while supporting the employee's ability and desire to complete the work at hand. Use High Reliability Organization (HRO) Universal Relationship skills such as: smile, greet others, and say "hello," introduce using noted preferred names and explain roles, and listen with empathy. Identify your script below:

Location & staff permissions:

Identify and communicate with a leader in the Go See location that you are performing a Go See.

- Who needs to provide permission at the Go See location(s)?
- How and when will you contact them?

Ensure that there is a communication plan for alerting staff in the Go See location that you will be talking to or observing them—and that the communication has been made.

- Who will be communicating with the staff?
- How and when will they be contacted and informed?

Confirm date of the Go See:

Identify and confirm the date and time of the Go See with the identified partners. Send out calendar invites if appropriate.

Who do you need to speak to during the Go See:

- Identify staff members involved in the process and their respective locations

Name & Role

Person's location

Who will let them know you're coming?

Identify key things you want to observe during the Go See:

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What is your hypothesis—e.g., what, if anything, might be causing the problem?

Script questions you might ask. Remember:

- *You're talking to the experts → Show them respect*
- *Be curious → Ask open ended questions*
- *Be open-minded → Refrain from asking questions that place blame or lead to a proposed solution*

Detail Go See observations:

- *Sketch observations and variations*
- *Define practice/process purpose—does it serve the goal?*
- *Identify potential waste in practice/process—are there rework or bottleneck moments?*
- *Does the process meet expectations?*

Reflect on your Go See observations:

- *What does the process accomplish—is the employee helped to successfully complete the work?*
- *Identify tools, forms, patterns or routines used*
- *What was different from expectations and observations?*
- *What assumptions were challenges?*

Go See Next Steps:

- *Do you need more information to understand the current status?*
 - *What else do you need to Go See? Is it Up or Downstream from the current observed process?*
- *Does this Go See provide a complete picture of the current process?*
- *Reflect on the scope/aim—does it or the problem require modification?*
- *What additional data do you need to collect?*