



Go and See field guide

A clean, printable overview for leaders who want to observe the work before changing the work.

WHAT IT IS

Go and See means stepping into the place where the work happens, watching the flow, listening to the people doing it, and capturing facts while you are there.

Reports tell you what happened. Going and seeing helps you learn why.

WHAT IT IS NOT

- ☐ Not a surprise audit
- ☐ Not a blame hunt
- ☐ Not a walk built on assumptions

What to observe

Use the same observation categories that appear inside ClarionEX.



Safety

Unsafe conditions, strain, near misses, exposure.



Quality

Defects, rework, missing checks, avoidable errors.



Process

Delays, handoffs, unclear steps, extra motion.



People

Training gaps, overload, workarounds, fatigue.



Environment

Layout, noise, waste, cleanliness, conditions.



Comm.

Missing information, unclear expectations, slow approvals.

1 Before

- Set a clear purpose for the walk.
- Choose the area, time, and people to learn from.
- Review known issues, but do not let reports drive the whole visit.

2 During

- Watch the work first, then ask open questions.
- Capture exact facts, not opinions disguised as facts.
- Notice delays, safety risk, confusion, rework, and workarounds.

3 After

- Cluster what you saw into patterns.
- Separate urgent issues from items that can wait.
- Assign follow-up and verify again on the next walk.



Observation worksheet

02

A clean field sheet for recording what you saw, where you saw it, and what needs follow-up.

Walk title

Area / dept.

Date

Observer

Category key



Safety



Quality



Process



People



Env.



Comm.

Observation

☐ Escalate ☐ Trend

1

Safety

Quality

Process

People

Env.

Comm.

What did you observe?

Describe what you saw, using facts rather than assumptions.

Location / point in process

Immediate action needed

Owner / follow-up

Evidence / example

Due date

Checked by

Walk no.

Optional second note

Use this space for a second fact, a witness phrase, or the exact point where the work slowed down.



Tip: write what you saw, not what you think caused it. Cause comes later. Facts come first.



Leader questions and listening guide

Questions that open people up, plus the signals that tell you where the real friction sits.

GOOD QUESTIONS TO ASK

- Walk me through what happens from the moment this starts.
- What makes this step easier, and what makes it harder?
- Where do you usually get stuck?
- What rework shows up most often?
- If this breaks, what is the first sign?
- What do you wish leadership understood about this process?
- Where does work wait for information, approval, or a system response?
- What is one small change that would remove friction right away?

WHAT TO LISTEN FOR

Repeated workarounds

People say we usually have to, or the only way around it is.

Hidden waits

Look for time lost to steps, approvals, or system lag.

Unclear ownership

Watch for nobody knows, they handle that, or I am waiting.

Standard work drift

Listen for everyone does it a bit differently.

TRAPS TO AVOID

- ☐ Leading the witness with your own answer
- ☐ Turning the walk into a performance review
- ☐ Recording opinions without verifying them

ESCALATE NOW IF YOU SEE

- ☐ An active safety risk or near miss
- ☐ Compliance, privacy, or environmental exposure
- ☐ Customer harm, repeated critical defects, or severe delay



Pattern review worksheet

Use this page after the walk to separate single events from recurring patterns and surface likely drivers.

CLUSTER WHAT YOU SAW

Pattern or issue	Evidence from the floor	Seen how often?

COMMON CAUSES CHECKLIST

- | | |
|--|--|
| ☐ Unclear standard work | ☐ System issue |
| ☐ Training gap | ☐ Layout or environment |
| ☐ Poor handoff | ☐ Staffing or capacity |
| ☐ Too many priorities | ☐ Weak communication |
| ☐ Delay in approval | ☐ No owner / follow-up |

Likely cause notes

RISK FLAGS

- | | |
|---|--|
| ☐ Safety | ☐ Compliance |
| ☐ Customer impact | ☐ Environmental |
| ☐ Quality / defect | ☐ Reputation |

PARKING LOT

Capture items that matter, but are outside the immediate scope of the walk.



Debrief and action plan

05

Turn the walk into visible follow-through, with owners, dates, and a clear next check.



A good walk ends with action. Keep the list short, assign real owners, and verify again on the next walk.

ACTION PLAN

Action	Owner	Due	Status	How will we verify?

LEADERSHIP FOLLOW-UP

What will I communicate back?

What must be checked next time?

WISDOM

"The way of a fool is right in his own eyes, but a wise man listens to advice." - Proverbs 12:15

Strong leaders spend time where the work happens, listening more than talking.

NEXT CHECK