



Process Walk Checklist

About Process Walks:

Process Walks are done for any process-focused initiative to 1) observe and identify wasteful activity and 2) gain process knowledge.

How do you conduct a Process Walk?

1. Go to the actual place the work is done.
2. Talk with the actual people working in the process.
3. Observe the actual process by literally walking through it (i.e. “paperclip” yourself to the process).

The Seven Wastes

As you walk through the process, there are seven types of waste that may be identified. Waste is a term used to describe any non-value added activity (i.e. it's not legally required and customers and business don't want it).

The seven wastes to look for on a Process Walk are:

1. **Motion** (e.g., walking, routing information, repetitively reaching for things)
2. **Process** (e.g., unnecessary process steps, variation in process methods)
3. **Overproduction** (e.g., unnecessary information, copy and paste)
4. **Transportation** (e.g., hand-offs)
5. **Defects** (e.g., incomplete information, rework)
6. **Inventory** (e.g., tasks waiting to be started, work-in-progress, storage of supplies)
7. **Waiting** (e.g., delays, queues)

What should you ask while on your Process Walk?

Ask anything that will tell you more about the process or to gleam into wasteful activities. The following are some typical Process Walk questions:

- What do you do?
- What information is provided to you to do your job (i.e. what are your inputs and where do they come from, what causes you to do work)?
- What information is created due to your process (i.e. what are your outputs and where do they go to)?
- What is your typical processing time (i.e. cycle time)?
- How many items are currently waiting to be processed?
- What causes delays or problems?
- If you could recommend changes, what would they be?

Deliverables

During the walk:

- **Process Walk Worksheet.** This is a spreadsheet containing columns to log responses to the questions you ask during your log.
- **Waste Worksheet.** This is a spreadsheet to categorize and list wastes as they are identified during the walk.

After the walk:

- **Process Data Summary.** This is a spreadsheet to summarize statistics and non value-add activities you gathered during the walk. Below is an example of what one may look like.

Process Summary Analysis Worksheet														Total		
Process Step	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Minutes	%
Est. Avg. Time (min.)															0.0	100.0%
Value Added															0	0.0%
Non-value Added																
Internal Failure															0	0.0%
External Failure															0	0.0%
Control/Inspection															0	0.0%
Delay															0	0.0%
Preparation/Setup															0	0.0%
Moves															0	0.0%
Bottlenecks															0	0.0%
Value-Enabling															0	0.0%
Totals															0.0	0.0%

Value Added Steps must meet **all three** of the following criteria:

- 1) The customer must be willing to pay for that step in the process.
- 2) The step must physically change or transform the product or service.
- 3) The step must be done right the first time.

Process: _____
Date: _____

- **List of problems and opportunities.** Analyze the two worksheets you created during the Process Walk. Be concise as you list your findings as this will be used to review with management and to plan next steps.
- **“As-is” Process Map.** Document (or review) the current-state process map. SIPOC or Swimlanes are good formats to use.