Observation, when used as a tool in process improvement, is a method by which an observer gathers and analyses information about the processes individuals follow in their day to day roles. An engagement driven approach focuses on conversations between observers and process players that are generated from the observation. They provide the process player with an opportunity to question and reflect on both the processes they follow and the steps within the process. This can result in the process player identifying for themselves key elements for process improvement.

Whilst the role of the process player in self-analysis is vital, the role of the observer in the conversation and in creating the environment for this cannot be underestimated. A skilled observer will ensure the process player feels comfortable and at ease during the conversation, that questions and prompts are offered in a non-confrontational and non-judgmental way and that a safe and productive environment for reflection is created.

**Pros and cons**

**Pros**
- Gain detailed understanding of the process
- Tap into skills and knowledge
- Encourages process players to engage
- Encourages quieter or less confident process players to engage
- Helps to build relationships and encourages ownership.

**Cons**
- Can feel quite intimidating if not handled properly
- Time pressure
- Single perspective, results need to be validated
- Process players may regard this as an inconvenience
- May raise expectations.

**Hints and tips**
- Use this technique either on a one to one basis or with small groups. If there are larger groups, it may be more appropriate to use other tools.
- Identify the key team member(s) to observe carefully. This can be a useful way of engaging quieter members of a team.
- Always seek permission from the individual and their line manager and explain the purpose of the conversation.
- Hold the conversation in the process player or user’s work area. ‘Walk’ the process with them if necessary; you can observe records that are kept, documents and systems used and checks required.
- Approach with a listening ear and open mind, be aware that the process player may be concerned about the change, unhappy about being under scrutiny or fearful of being told they are doing a bad job.
- Use a structured approach to capture and record process information. Adopting a standard template around which the conversation is held and information is recorded ensures a thorough and consistent approach.
- Have a clear start and end point for the process you are discussing. Break this down into smaller parts or focus on a specific element to ensure you capture the right level of detail.
- Use the idea of ‘value adding’ and ‘non value adding’ activities as part of the analysis and as a way of targeting improvements.
- Follow the individual’s full process, even if it feels irrelevant, quite often this is where key observations are made.
- Ask open ended questions, give process players time to think, answer, reflect and explain. Pick up and refer back to small comments which could be taken further.