

Gemba: observe work, ask, follow through

Distinguish an observed work condition from an interpretation, ask a respectful question that improves understanding and close a support commitment at the work.



The handwritten note has a purpose

Fictional packing area: leader Ben sees operator Asha using a handwritten note beside the approved order screen. Earlier visits criticized unofficial paper, so colleagues are reluctant to describe workarounds. Ben wants to understand the handoff before deciding whether the note is a problem.

Your role and the reference condition

Leader visiting with the colleague who performs the work.

Normal: The approved process supplies the information needed to identify the order and complete the handoff correctly.

Gap: The note appears to supply information missing at the moment of work, but its purpose and accuracy are not yet known.

Work within these conditions

1. Respect local access, privacy and operating rules; use only fictional order records in this exercise.
2. Observation is not permission to bypass the current method or remove a control before understanding its function.

Fictional teaching case. Supplied observations support the exercise; proposed actions are not verified customer results.

See how the method works

Visit the work to understand how the process actually functions and what makes it difficult for the people doing it. Agree the purpose, observe a real sequence and ask about the difference between expected and actual conditions. Avoid turning every answer into an immediate instruction. Clarify what support is needed, make a specific commitment and return to check what happened. The quality of the visit is shown by learning and follow-through, not distance walked or boxes checked. Respect privacy and safe observation boundaries. A worker who exposes a problem should receive help, not punishment for making it visible.



Connected method map: Agree purpose, Observe and ask, Agree support, Return and verify. Every authored connection is shown with a numbered arrow and named legend.

Follow the evidence and decisions

Inspect the supplied case inputs

Recorded item	Evidence status
Asha reads screen, then note, before packing	Observed sequence
Note includes carrier cut-off	Visible fact in fictional scene
Asha dislikes the system	Leader's interpretation; unsupported
Approved screen	Cut-off not visible in the presented view
Accuracy / currency of note	Unknown

01 / Agree a learning purpose

Ben explains that he is learning how the next order is made ready and asks Asha to show the normal sequence without speeding up for the visit.

Why: A clear purpose reduces the pressure to perform for inspection and reveals the work as it happens.

Evidence / check: The visit question concerns information at the handoff, not a person's compliance score.

02 / Record sequence before judgment

He records screen, note and packing in order, separating what he sees from his inference about resistance to change.

Why: An interpretation can be tested only after the underlying observations are clear.

Evidence / check: The observation sheet marks dislikes the system as unsupported.

03 / Ask what the workaround accomplishes

Ben asks what decision the cut-off supports and what would happen without it. Asha explains that the screen lacks the needed timing at this point; they check the reference with the process owner.

Why: The note may reveal a design gap while also creating a currency risk. Understanding both is better than instant removal or blanket approval.

Evidence / check: Needed information, its source and the unanswered currency question are recorded.

04 / Agree support and return

The owner agrees to verify an approved information route and a bounded trial. Ben names who will provide support and returns to observe whether the information is available and correct.

Why: Listening without follow-through teaches the team that surfacing problems has no effect.

Evidence / check: The commitment contains owner, review point and observable handoff evidence; no successful trial is invented.

Observation, question and support record

At the work	Meaning / question	Next evidence
Screen then note	What decision needs the note?	Carrier cut-off at packing
Screen omits cut-off in this view	How is the official value supplied?	Process owner verifies route
Note currency unknown	Could a stale value misdirect work?	Compare authorized reference
Support agreed	Trial an approved information method	Return and observe correct availability

The note is wrong today

The reference check finds that the handwritten cut-off differs from the current approved value.

Decision

Use the local response for affected work and establish the approved reference immediately. Continue investigating why the work depended on the note.

Reasoning

Respectful learning does not ignore a real error; correcting the current risk does not erase the underlying information gap.

What would change the decision?

Record affected scope, current correction and the separate process-design follow-up.

Practise with a changed case

A spreadsheet beside the queue

New fictional office visit: an analyst checks a private-looking spreadsheet before assigning requests. It contains skill availability absent from the queue screen. Its access permissions and update ownership are unknown.

Observed / known	Unknown
Spreadsheet consulted before assignment	Who maintains it?
Queue screen omits skill availability	What approved source should provide it?
Assignment needs a qualified receiver	Is the spreadsheet accurate and appropriately accessible?

Your task

1. Write two observations and two interpretations to avoid.
2. Ask a question that reveals the decision the spreadsheet supports.
3. Define support and return evidence without endorsing uncontrolled data handling.

Use the next page to record your reasoning before reading the answer.

Your practice worksheet

A spreadsheet beside the queue

Observed sequence

Question / colleague explanation

Unanswered accuracy or access issue

Approved support owner

Return observation and decision

Complete your reasoning before turning to the answer. Use the separate learner workbook for group practice.

Check your reasoning and transfer it

1. Consulting a spreadsheet and missing skill data are facts; laziness or dislike of the queue are unsupported interpretations.
2. Ask how a receiver is selected and what information would be missing without the sheet. Check current authority and access with the owner.
3. Agree a controlled information route and revisit an assignment to verify accuracy, access and usability. Do not copy private data into the exercise or close on a promise.

Suggested completed record

Record field	Suggested reasoning
Observation	Spreadsheet used to identify available skill
Question	What assignment decision needs this information?
Support	Verify approved source, access and update owner
Return	Observe a correct assignment using approved information

Plausible wrong turns

1. Gemba is not a tour collecting blame.
2. Listening does not require accepting an unsafe or uncontrolled workaround.

Evidence of a sound answer

1. Separate fact from inference.
2. Ask a question that changes what is observed next.
3. Provide an owned support and verification loop.

Take the learning back to work

Commitment	Agreed follow-through
Owner	Process owner and visiting leader with the colleague doing the work
Record	Observation/support commitment linked to the actual handoff
Review	At the agreed return observation, then through daily follow-up if unresolved
Verification evidence	Accurate approved information available at the work and colleague feedback
If unresolved	Address the design/support barrier and retain current risk controls; do not blame the person who exposed the workaround.

Help someone else apply the method

Prepare

1. Annotated fictional packing scene
2. Observation versus inference cards
3. Blank support record

Minutes	Activity and coaching prompt
4	Notice without judging What can you actually see?
7	Role-play inquiry What purpose does the note serve?
8	Practice office transfer What remains unknown about the spreadsheet?
5	Plan return visit What evidence would make support complete?

Debrief

1. Replace why do you ignore the system with a question about the work decision.
2. Ask what the leader owes the colleague after the visit.

Individual or remote practice

Write an observation and a competing interpretation in different columns before drafting the conversation.

Connect the method and check its boundaries

Before application

1. Respectful access
2. No blame for surfacing problems

Outside this lesson

1. Gemba is not a checklist patrol
2. Observation does not authorize technical intervention

LEI: Standard Work for Lean Leaders

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Leaders observe work and coach capability rather than blame or take over

Method reference; original OPEX scenario and diagram are synthetic teaching content, not source case results.

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