🔍 Observation Framework — Phase 1: Daily Operations

🎯 Objective

Capture the *real* day-to-day flow of operations — how work starts, moves, pauses, and completes — to map the "as-is" system with absolute accuracy.

🧭 1. **General Environment Snapshot**

Focus Area	What to Watch	Notes
Atmosphere	Team energy, pace, and general work environment	
Workspace Layout	How physical or digital spaces are organized	
Resource Flow	Movement of goods, data, and people	
Tool Usage	Visible systems, spreadsheets, manual tracking	

💁 2. **People and Roles in Motion**

Focus Area	What to Watch	Notes
Key Players	Who drives the operation day-to-day?	
Delegation	How is work assigned and tracked?	
Decision Points	Who approves, escalates, or signs off tasks?	
Knowledge Gaps	Where do people hesitate or rely on others?	

🔄 3. **Process Flow Observation**

Focus Area	What to Watch	Notes
Workflow Sequence	Step-by-step order from start to finish	
Inputs	What triggers each process (orders, requests, data)?	
Outputs	What's the final deliverable of that workflow?	
Handovers	How and when work passes between people/departments	
Delays & Bottlenecks	Where does work queue, wait, or repeat?	

💻 4. **Systems and Tools in Use**

Focus Area	What to Watch	Notes
Current Systems	ERP, POS, spreadsheets, WhatsApp, etc.	
Integration Points	How data moves (or doesn't) between tools	
Manual Workarounds	Shadow systems — notes, files, or side apps	
Data Accuracy	Mismatched info, double entry, missing data	

⚠️ 5. **Pain Points and Workarounds**

Focus Area	What to Watch	Notes
Frustrations	Where employees express friction or fatigue	
Repetitions	Tasks that feel duplicated or unnecessary	
Missing Links	Where staff "make it work" despite missing systems	

Focus Area	What to Watch	Notes
Communication Gaps	Misunderstandings, lost messages, poor follow-up	

📋 6. Observer's Summary (End of Day Reflection)

- Top 3 Observed Strengths

- Top 3 Operational Frictions

- Hidden Work (tasks not on any formal system)

- Informal Leaders / Influencers

- Early Hypotheses for Process Gaps