



EPICENTRAL

A Newsletter from Epicenter Development Group
highlighting ideas that improve organizations

Welcome to Epicenter Development Group's newsletter, EPICentral. The purpose of this newsletter is to highlight fundamental ideas that have helped organizations develop and maintain great manufacturing and service operations. We hope that you find our EPICentral newsletter helpful, and we would welcome your comments on its content.

The Humble Checklist - The Competitive Edge in a Complex World

Most people have used ad-hoc checklists in both their personal and professional life to plan their day or as a reminder of things to be done ("to-do" or "grocery" lists). The value of checklists, however, has also been shown in several industries to have a significant impact on overall performance. In this month's newsletter, I will outline some of the benefits of using checklists and considerations for building checklists that best meet your organization's needs.

A checklist is defined as a list of items required, things to be done, or points to be considered. A good checklist can help an organization to:

- eliminate "stupid" mistakes on critical operations that can affect safety, costs, and performance.
- improve a team's ability to handle uncertainty through enhanced communications.
- instill a kind of discipline towards higher performance by standardizing on and refining best team practices.

Some examples of where checklists are used are as follows:

- **Manufacturing Plants** - Changeover Plans, Project Plans, Assembly Plans, Safety Procedures, Inspections, and 5S Auditing.
- **Architects, Engineers and Builders** - Engineering and Construction Schedules (tasks to do) and Submittal Schedules (required communication steps after key tasks).

- **Healthcare** - Surgical Safety Checklists, Patient Intake Checklists, and Physical Exam Checklists
- **Human Resources** - New Employee Onboarding Checklists and Recruitment Checklists
- **Aircraft Industry** - Pilot Checklists, Emergency Plans, and Maintenance Checklists.

The Making of a Good Checklist:

- **Identify operations that could benefit from using a checklist:**
 - Risk of a "stupid" mistake being made periodically
 - Likelihood that a mistake would have a significant impact on the safety or performance of an operation
 - High process uncertainty and/or complexity that increases the likelihood of a mistake being made
- **Clearly identify when a specific checklist should be used.**
 - When does a person or team start using a specific checklist?
- **Identify the most critical and important process steps and reminders to use for each step.**
 - The checklist is not intended to be a comprehensive list of all steps.
- **List the checklist items:**
 - Wording should be efficient and to the point and clearly understood by people using the checklist
 - Ideally, the list should fit on one page
 - Ideally, there should only be 5-9 key items
 - Ideally, it should take less than sixty seconds to complete the checks on the list.
 - The list should be easy to use even under stress.

Packaging Order Scheduling Checklist

- Inlays Available and Correct
- Booklets Available and Correct
- CD's Available and Correct
- Spine Label Graphic in Computer System
- PID Stickers Available, Correct and Rewound
- Key Code Stickers Available
- Stickers Available and Correct
- Sticker Placement Known

Machine Safety Checklist		Review Date: _____		
		Reviewed By: _____		
No.	Inspection Item	Present	Needs Correction	Date Corrected
1	Are employees aware that they should not operate farm machinery when guests are present, unless the machinery is being demonstrated or is part of an activity?	<input type="checkbox"/>	<input type="checkbox"/>	
2	Are all front end loaders, three point hitch attachments and implements lowered to the ground when not in use?	<input type="checkbox"/>	<input type="checkbox"/>	
3	In visitor areas, is machinery parked on level surfaces and secured with parking brakes and wheel blocks when not in use?	<input type="checkbox"/>	<input type="checkbox"/>	
4	Is equipment lacking proper safety features (such as ROPS) not used for demonstration purposes?	<input type="checkbox"/>	<input type="checkbox"/>	
5	Is unsafe equipment stored out of visitor sight in locked storage areas?	<input type="checkbox"/>	<input type="checkbox"/>	
6	Are visitors informed that they are not allowed to climb or play on machinery, and do employees enforce this rule?	<input type="checkbox"/>	<input type="checkbox"/>	
7	Have all keys been removed from machinery when not in use?	<input type="checkbox"/>	<input type="checkbox"/>	
8	Are barriers installed around operating and non-operating equipment to keep visitors away? Are signs posted indicating that visitors must remain behind the barriers?	<input type="checkbox"/>	<input type="checkbox"/>	
9	Is equipment being demonstrated kept at least 20 feet away from visitors?	<input type="checkbox"/>	<input type="checkbox"/>	
10	Do employees supervise all visitors present when machinery is in operation?	<input type="checkbox"/>	<input type="checkbox"/>	
11	Are rules in place and enforced prohibiting children and visitors from operating machinery?	<input type="checkbox"/>	<input type="checkbox"/>	
12	Is equipment operated by a licensed adult employee?	<input type="checkbox"/>	<input type="checkbox"/>	
13	Are rules in place and enforced prohibiting extra passengers on tractors and equipment?	<input type="checkbox"/>	<input type="checkbox"/>	
14	Is equipment that ejects or throws objects operated only when visitors are not present?	<input type="checkbox"/>	<input type="checkbox"/>	
15	Is the loading capacity of all vehicles checked, and the vehicle used according to capacity?	<input type="checkbox"/>	<input type="checkbox"/>	
16	Are vehicles driven slowly and low only one piece of equipment when used in an agtourism site?	<input type="checkbox"/>	<input type="checkbox"/>	
17	Is the tractor hitched to the wagon prior to guest loading when used for hayrides?	<input type="checkbox"/>	<input type="checkbox"/>	

Resources that can be used to address these checklist items are available at www.aafsq.org/forfarmers.htm. Resources: These resources include signs, policies, forms, logs, and other items.

National Children's Center for Rural Agricultural Health Safety www.nccrhhhs.org
 Funding provided by the National Institute for Occupational Safety and Health (NIOSH award no. 1U49CE000604-04)

- **As necessary, break the checklist up into phases with each phase having a "pause point" for the team to review status and/or next steps.**
 - Example: Pre-Changeover Prep, Changeover phase, Post-Changeover phase.
- **Test and refine the checklist in the "real-world" before using it.**

Considerations:

- It can be difficult to convince people to use checklists because they can be seen as mundane and "simple." For this reason, it is suggested that an organization start with a pilot program which measures and communicates the tangible impact on safety and performance before using checklists company-wide.
- Using a checklist can involve cultural changes so it is best if the initiative is fully supported by leadership.
- For more information on the tangible benefits seen by using checklists or more examples of checklists in use, refer to the book "[The Checklist Manifesto](#)" by *Atul Gawande*.

Next Steps

If you would like more information on this topic or other similar types of tools, please contact Bill Proctor with your request at wproctor@epicentergroup.com or 216-702-0952. You can also find previous issues of EPICentral at [Newsletters](#).

Mr. Proctor also speaks on a variety of problem-solving and system design topics that can help companies significantly increase the success and profitability of their businesses. If you are interested in having Bill speak at one of your upcoming meetings/events or would like more information on any of the speaking topics, please visit [Speaker Services](#) or you can email sales@epicentergroup.com.

Epicenter Development Group is a unique consulting firm that seamlessly integrates the disciplines of Systems Engineering and Organizational Analysis & Development to create practical design solutions to your toughest challenges. It is on the cutting edge of problem-solving solutions and the creator of a unique process called GreenRoom Engineering. This process adds greater value and cost savings for clients as compared to traditional engineering methods.

William Proctor, Epicenter's founder and president, has provided services around the country to more than 100 companies consisting of a variety of organizations; and Epicenter continues to grow as a resource for firms of all sizes.

To learn more about Epicenter Development Group, visit our website:

www.epicentergroup.com

Epicenter News

Epicenter was recently awarded a new project at AGC in Tennessee.



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