

WALKTHROUGH REFERENCE SHEET



Tips for the walkthrough

-  Enter workstations cautiously, showing respect for workers and letting them lead the way
-  Uncover possible root causes by using the "5 whys" technique
-  Ask permission before taking photos during the walkthrough
-  Observe general patterns and specific equipment behaviours
-  Ask questions about standard procedures and about anything that seems unusual or out of the ordinary
-  Record each opportunity in the opportunity tracking sheet
-  Include details like location, equipment (e.g., horsepower, wattage, run-time), set points, schedules and any overrides
-  Flag any missing or unclear data for follow-up
-  Thank staff who took time to answer questions or provide insight

Examples of questions to ask

- What time does the equipment need to start to meet production?
- What are the minimum / maximum setpoint requirements of the system or piece of equipment?
- What equipment can we turn off at breaks, lunch or between shifts?
- What time can we turn the equipment off after production?
- Is there wasted energy that can be recovered or reused?
- What is the overall system requirement? (e.g. operate 1 piece of equipment at 80% or 2 at 40%)
- Have there been any complaints about the equipment or facility conditions?



Safety reminders

- Wear required PPE at all times
- Stay in designated walkways
- Do not write notes while walking
- Do not touch equipment unless authorized
- Follow all site instructions

TYPES OF WASTE AND EXAMPLES (COMMERCIAL)

Type of waste	Examples	What are the opportunities
Unnecessary running or idling	- Lights and office equipment left on overnight or during weekends - HVAC running in unused rooms	Turn off or dial back equipment during non-active time
Leaks	- Leaky faucets - HVAC duct leaks - Steam leaks - Poorly sealed windows/doors	Repair or prevent leaks in compressed air, steam, water lines or building envelope
Friction loss	- Dirty HVAC filters - Blocked vents - Restricted airflow through closed grilles	- Clean and maintain filters, ducts and heat exchangers - Check for pipe or hose restrictions or worn mechanical components
Sub-optimal efficiency	- Old lighting systems without occupancy sensors - Oversized HVAC units running at full load	- Replace existing equipment with higher-efficiency models - Match system capacity to actual demand - Optimize operating setpoints
Malfunctions	- Thermostats reading incorrectly - Broken fan dampers - Control sensors out of calibration	- Repair broken actuators, switches and valves - Regularly calibrate control systems - Maintain preventive maintenance schedules
System imbalance	- Simultaneous heating and cooling in a building zone - Overrides causing systems to run continuously	- Ensure set points are properly set and adjusted for new conditions - Check for overrides and manual modes
Misapplication	- Using compressed air for cooling staff - Space heaters in already-conditioned rooms	Find alternatives to compressed air and correct improperly-sized or ill-suited equipment
Underutilization	- Rarely used equipment kept running - Lab fridges/freezers mostly empty - meeting rooms always lit	- Avoid erratic scheduling, rush orders, downtime and bottlenecks - Review use of existing systems
Traditional lean waste	- Manual re-entry of data - Unnecessary approval steps - Delivering items back and forth unnecessarily	Reduce scraps, defects, over-processing, unnecessary movement and material handling