

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 (INDUSTRIAL)

Type of waste	Examples	What are the opportunities
Unnecessary running or idling	- Conveyors or motors running while lines are down - Lights left on in unused production zones	Turn off or dial back equipment during non-active time
Leaks	- Leaks in compressed air lines - Steam escaping from valves - Water leaks near cooling systems	Repair or prevent leaks in compressed air, steam, water lines, or building envelope
Friction loss	- Fouled heat exchangers - Pinched hoses - Worn belts or bearings increasing motor load	- Clean and maintain filters, ducts and heat exchangers - Check for pipe or hose restrictions or worn mechanical components
Sub-optimal efficiency	- Oversized motors - Outdated machinery - Systems not tuned for current load or conditions	- Replace existing equipment with higher-efficiency models - Match system capacity to actual demand - Optimize operating setpoints
Malfunctions	- Broken actuators - Valves stuck open - Sensors feeding false readings to control systems	- Repair broken actuators, switches and valves - Regularly calibrate control systems - Maintain preventive maintenance schedules
System imbalance	- Equipment fighting each other, such as one heating while another cools - Excessive cycling due to bad controls	- Ensure set points are properly set and adjusted for new conditions - Check for overrides and manual modes
Misapplication	- Using compressed air instead of mechanical tools - Applying high-speed tools to low-speed tasks	Find alternatives to compressed air and correct improperly-sized or ill-suited equipment
Underutilization	- Machines idle between batches - Equipment powered for partial loads - Poor production scheduling	- Avoid erratic scheduling, rush orders, downtime and bottlenecks - Review use of existing systems
Traditional lean waste	- Long material transport routes - Overprocessing product finishes - Scrapping due to unclear specifications	Reduce scraps, defects, over-processing, unnecessary movement and material handling