

Site Visits

Guidelines for Practice

What is it?

A site visit is like the scavenger hunts you use to go on as a kid. Team members from another location come to a site that has some special competence to look for ideas they could use back home.

It is up to the visitor to find what would be useful - only they can see the difference between what they are doing in the home site and what is happening where they are visiting - and, most important, whether the difference would be useful.

Site Visits are most effective when there is something physical to see e.g. equipment, process in action, meetings held for analysis or decision. Site Visits are less useful when everything that is happening occurs inside of someone's head - although you could still have a useful conversation with the local expert.

Site Visits are especially helpful when the site being visited has some special competence or best practice. Surprisingly, even when another site is not considered special, it is possible to gain many ideas from the differences noticed.

How to make it work

Often only a few members of a unit make a site visit and the goal is to take what they learn back for others to implement. To facilitate the transfer of knowledge to those who are not on the visit:

- Before the site visit, hold a meeting of those at the home site who will be expected to implement the ideas when the visiting team returns. Ask this group to formulate the questions they would like to have asked during the site visit and what they would like the visiting team to look for on their behalf.
- At the end of each day during the site visit, meet to reflect on what has been learned and

- Also at the end of each day, make a conference call to your home site to relay to your colleagues what has been learned and to obtain from them additional questions and concerns to be addressed the following day.

During the site visit your host will want to make some presentations to help you understand what is going on. That will be useful, but don't let presentations dominate your visit. You will learn the most from your observations and from informal talk you have with front-line staff.

A few more tips:

- Before the site visit arrange with your host to have plenty of time on the schedule to observe and talk informally.
- Ask your host if there is anything they'd like you to observe or provide feedback on, in order to make this visit useful to them as well as you.
- Your host organization may want to send around a memo to areas you will be visiting to let them know who you are and the purpose of your visit.
- It is less disruptive for visitors to go in pairs during observation time, rather than staying in a group of 5-6.
- You will want your eyes to function like a video camera, noting everything that happens.
- Have a notepad so that you can make detailed notes and sketches that reflect things like, time (e.g. patient waiting times), traffic patterns, who interacts with whom, the tone and feel of the situation. These notes will be invaluable in bringing rich detail to your team discussion at the end of each day.
- Some groups bring with them an observation form that incorporates the elements that the group wants to understand more fully.
- Be careful of taking pictures. It is often acceptable to take pictures of inanimate objects, but particularly in healthcare settings, taking pictures of patients is inappropriate.

And finally

Host groups are always curious about what you have observed and found. Before you end your site visit you will want to take time to reflect on your learning with your host. These reflections can best be formatted as

descriptive of what you saw and noted, rather than what you think should be fixed.

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Ford - Vehicle Operations

When Dale McKeehan, VP of Vehicle Operations at Ford, wanted to get more sharing of ideas between Europe and North America (both within his area of responsibility). He sent a team of production engineers from a Vehicle Operations plant in Kansas City to a similar plant in Saarlouis, Germany. The production engineers were there to "walk the line" with their German counterparts to see what was happening in the Saarlouis plant that they could use in their Kansas City plant. Then a few weeks later the German team paid a visit to the Kansas City plant, again to see what they could use. Out of these meetings 15 short term and 30 long-term Best Practice items were identified. In addition to identifying 45 best practice ideas during their initial visits, something else happened that was perhaps more important. The engineers from the two plants got to know each other; they came to respect each other and to recognize that their counterpart in the other country had some very useful ideas that they had not thought of themselves.

This initial exchange provided for basis for the Ford Best Practice Replication system that now transfers ideas between 37 vehicle operations plants around the world.

Conoco

Alan Brown, the turnaround lead for the Humber refinery, knew that the Ponca City refinery had a turnaround in about a month and he thought it was an opportunity to see what he could learn that might be useful for the up-coming Humber turnaround. From taking part in the monthly teleconference between the refineries, he already knew that Ponca did things differently than Humber - so there was some potential for learning.

Alan took with him his planning coordinator and they spent a week in Ponca City. He brought back to Humber 10 ideas including, use of reconditioned valves, how shifts are operated, how to work with contractors.

One of the simple ideas that Alan observed in Ponca City was having a Conoco employee "shadow" the contractor boss. When the contractor needed some information or needed to get something done quickly, the Conoco employee often knew a short cut through the system that would save time and dollars. This practical idea was one that Ponca City would never have thought to offer as a "best practice" yet Alan saw that it could make a difference in Humber.

The ideas that Alan took back saved over \$200,000 during Humber's next turnaround. And Alan felt he had just skimmed the surface on his Idea Search, when he goes back again he plans to look in more depth at other practices Humber could use.