OPERATIONS INSIDER

LEAN · OPERATIONS · LEADERSHIP

THE MANAGER'S PEOPLE AND TEAMWORK QUICK START CHECKLIST

Score one team in twenty minutes, with evidence you can point at.



EVERY TASK COVERED. EVERY START PLANNED.

START HERE

How to Use This Check

One team, one walk, the people who work in it. Twenty minutes, twenty-five statements, one number.

01 WALK	02 SCORE	03 ACT
Go to the team with the team leader and one team member. Do not score from a meeting room.	Score each statement from 0 to 4. Without something you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across shifts.
3	Mostly in place and visible in the team.
4	Consistently in place, visible, reviewed and improved.

> **WHY ONE TEAM**
>
> **A plant does not have one level of teamwork. A team does. Score the team where absence, turnover or new starters hurt most, and repeat the check there every quarter.**

Before You Start

- **Team:** choose one team with one team leader, ideally on the shift with the most new or temporary staff.
- **Evidence:** the skills matrix, the onboarding plan, the handover sheet, the board. If it is not in the team, it does not count.
- **People:** ask team members, not only the team leader. Score the system, never a person, and do not write names on the check.

THE CHECK

01 Onboarding and Qualification

NO.	CHECK	SCORE 0 TO 4
01	Every new team member follows a written plan for day one, week one and month one, with a named buddy from the team.	
02	Nobody works alone at a station before a qualified trainer has signed off that station, and the sign-off is on file.	
03	Station training follows the standard in four steps: show and explain, do with support, do alone while observed, confirm.	
04	New starters have a review conversation after week one, week four and month three, and the result is written down.	
05	Temporary and agency staff receive the same safety induction and station sign-off as permanent staff.	

02 Skills and Cross-Training

NO.	CHECK	SCORE 0 TO 4
06	A skills matrix shows every person against every task with levels 0 to 4 and was updated within the last month.	
07	Every critical task has at least three people at level 3 or higher, and every gap has a training date.	
08	Tasks that only one person can do are listed, and each one has a named second person in training.	
09	A cross-training plan reserves hours every week, and planned against completed hours is visible to the team.	
10	Expert knowledge on critical tasks is captured as standards, one point lessons or short videos before the expert leaves.	

THE CHECK

03 Team Structure and Daily Routines

NO.	CHECK	SCORE 0 TO 4
11	Each team has one team leader for a written span of people, and the team leader is not planned on a station.	
12	The team leader spends at least half of the shift on support: problems, training, standards, help at the stations.	
13	Shift handover is held face to face at the workplace with a fixed structure, and open points are written down.	
14	A team talk of ten minutes or less runs at the board at the start of every shift, with the same agenda.	
15	Escalation from team to team leader to the next level has defined triggers and response times, and they are kept.	

04 Safety and Ergonomics

NO.	CHECK	SCORE 0 TO 4
16	Near misses are reported through a simple channel, and every reporter gets an answer within one week.	
17	Team members take part in the risk assessment of their own workplace and can name the main risks of their station.	
18	Protective equipment is defined per station and treated as the last line, after measures on the hazard itself.	
19	Every station has an ergonomic score from one simple method, and every red station has an action or a rotation rule.	
20	Job rotation follows a written plan that considers physical load and skills, and records show that it is done.	

THE CHECK

05 Involvement, Feedback and Stability

NO.	CHECK	SCORE 0 TO 4
21	Every team member has a structured feedback conversation with the team leader at least twice a year.	
22	Good work and improvements are recognised promptly and specifically, and the team can name the last example.	
23	Ideas from the team get an answer within an agreed time, and the team can show ideas that were implemented.	
24	Absence and turnover are reviewed per team every month, and the team leader looks for causes in the work itself.	
25	Personal data in skills, absence and safety records is handled under written site rules, with limited access.	

Your Result

BLOCK	POINTS	OUT OF
01 Onboarding and Qualification		20
02 Skills and Cross-Training		20
03 Team Structure and Daily Routines		20
04 Safety and Ergonomics		20
05 Involvement, Feedback and Stability		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you where the team stands. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Ad hoc. People learn by watching, and the team depends on a few experts.	Build the skills matrix. Write a one-page onboarding plan with a buddy.
40 to 59	Structured start. Onboarding and matrix exist but are not kept on every shift.	Fix the team talk and the handover. Sign off every station before solo work.
60 to 79	Stable team. Routines hold and gaps are known.	Run a cross-training plan with reserved hours. Score ergonomics and rotate.
80 to 100	Flexible team. Coverage meets the target and knowledge is captured.	Hold the level. Let the team plan its own training. Transfer to the next team.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check in the same team in 90 days and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
PEOPLE AND TEAMWORK STARTER KIT	The guide for your first 30 days with one team, plus the skills matrix and onboarding tracker in Excel.
PEOPLE AND TEAMWORK EXCELLENCE BUNDLE	The full playbook, workshop pack, shop floor forms, the Excel system for several teams and a ready-to-use workshop deck.

Both are available at operationsinsider.com.