

## **OBSERVATION CHECKLIST**

- What to observe:
  - Numbers of people at their desks or workstations over time.
  - Phones being personally answered.
  - Condition of the workplace; orderliness or disorder.
  - Demeanor of employees: smiling, hostile, speaking in the open or furtively.
  - Management presence of lack of presence; open or shut doors of individuals.
  - People present prior to starting time, over lunch, and after ending time.
  - Arguing or friendly kidding and pranks.
  - Employee personalization of desk space, cubicles, offices.
  - Signs and reminders—employee activities, parties, communal notices.
  - Flexibility and diversity versus regimen and homogeneity.
- Why observe and how to analyze:
  - Watch for overarching patterns, not one-off behaviors.
  - Determine whether this is a friendly, impersonal, or hostile workplace.
  - Determine whether collegial or hierarchical boundaries most apply.
  - Understand priority of customer service and responsiveness.
  - Watch for voluntary work versus strictly nine-to-five mentalities.
  - Determine if workplace is team-centered or individually competitive.
  - Determine whether it is a highly productive or highly wasteful environment.

- Assess whether resources are present to do the job properly.
- Assess whether management and oversight are apparent.
- What to do with findings:
  - Document with specific observations supporting claims/ findings.
  - Suggest further aspects of project or additional work as needed.
  - Adjust your project work to accommodate actual work culture.