Experiential Learning

Using Gemba Walks to Connect With Employees

By Scott Gesinger

Nearly all OSH professionals have attended an adult learning course and heard this basic principle: Adult learning is most effective when it is experiential (Knowles, 1984). In the author's experience, safety professionals tend to follow this axiom well for others, but forget to apply it to themselves. Case in point: Most readers can think of at least one peer who writes safety programs that apply to tasks s/he does not understand (e.g., writing a forklift safety program but never having driven a forklift).

Relying on safety professionals to provide technical guidance on items with which they have no experiential knowledge is problematic. How can a person provide proper technical guidance if s/he has never experienced the activity? Furthermore, how can safety professionals and managers realistically expect employees to follow guidance that they know was written by someone who has never performed the activity in question? Imagine sending an inexperienced teenager to a driving course taught by an individual who has vast safety expertise but has never driven a car. Would that teenager's parents have confidence in that instructor or would they prefer a driving course taught by someone who has no safety management training but is a long-term licensed driver with a good record?

Most people remember Chuck Yeager as a gifted test pilot and the first human to break the sound barrier. What most do not know is that Yeager began his military career as an enlisted mechanic. He was made a flying sergeant when the Army Air Corps needed more pilots for service during World War II. In his autobiography, Yeager (1986) recounts multiple instances where the knowledge he gained building, repairing and diagnosing mechanical problems with aircraft saved his life as a pilot in combat and when flying experimental aircraft.

Yeager's experiences can be used as an analogy to the knowledge one gains during a Gemba walk. By taking the time to understand a knowledge set outside of his immediate area of concern (piloting the aircraft), Yeager was able to apply a unique perspective to the challenge at hand (quickly diagnosing and dealing with an in-flight emergency) in a manner that produced the most favorable outcome. Had Yeager not understood the mechanics of his aircraft, he would not have had the skill set to diagnose problems and understand the aircraft's capabilities. In a similar way, by engaging in the practice of Gemba walks an OSH professional can gain knowledge outside her/his immediate area of concern to apply unique perspectives to problem solving when OSH challenges arise.

The Practice of Gemba Walks

As opposed to management by walking around, a Gemba walk is taking the time to learn and understand the work employees perform. The term *Gemba* comes from a Japanese word that means "the real place." In lean management, a Gemba walk is when a member of management (or in this case the safety department) goes to the "real place" where work is performed and learns how and why employees perform

IN BRIEF

- **True competency for OSH professionals includes knowing how and why employees do their jobs the way they do.**
- **Dedicating time to learning employees' jobs will allow OSH professionals to create more realistic safety programs and gain greater employee buy-in to safety initiatives.**
- **If a job is too risky for the OSH professional to perform or observe, do not expect other employees to do it.**

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the work the way they do (Womack, 2011). Ohno (1998) developed Gemba walks as part of the Toyota Production System, which is the basis of the lean manufacturing philosophy.

OSH professionals can take this concept one step further and dedicate scheduled time each month to perform work side-by-side with employees. In other words, OSH professionals would do well to dedicate a portion of their continuing education each year to learning details about a technical skill related to their workplaces (e.g., become a certified forklift operator, attend a trade-related course).

Working with line employees to learn their jobs will not only improve a safety professional's understanding of how production work is performed, it will also help the OSH professional build relationships and it will encourage direct, unfiltered feedback from employees. Carrillo and Samuels (2015) highlight the importance of this type of feedback, and point to gains received through meaningful conversations with employees.

In the author's experience, once an employee sees a safety professional do something like, for example, shoveling corn with employees, or sitting next to an employee and assembling a fiber-optic component, the employee's attitude toward that safety professional and toward safety in general becomes less guarded, and the employee begins to provide substantive feedback about safety. In time, employees with whom a safety professional has built a relationship are more likely to flag the safety professional down as s/he passes through a department to report a concern or share feedback.

Once a safety professional demonstrates that the work employees perform is not beneath the safety professional, the safety department can create more

realistic policies and procedures that reflect the hands-on experience gained by performing the work tasks.

Chuck Yeager's story provides additional insight. One reason Yeager was a superior test pilot was his ability to relate to those who built and maintained the experimental aircraft he piloted. Yeager worked with these crews before ever leaving the ground in order to develop a fuller understanding of the aircraft, an understanding that saved his life in multiple situations (Yeager, 1986). In this same way, a safety professional can create policies that are more reflective of employees' true needs and capabilities once s/he has learned what it feels like to hold the parts, turn the screws or bounce over roads in the driver's seat.

Working in the trenches with employees also allows a safety professional to perform more effective incident investigations. During an investigation, the investigator can listen to an employee describe why the guard on a cutting tool was removed, or the investigator can walk through the performance of a task with the employee and experience why the guard was removed. Anyone can read through policies, talk with employees, take photos of a removed guard, and conclude that employees simply need to do the job the way management tells them to. It takes something more to go to the workstation and have an open enough mind to experience why the employee removed the guard to do the job the way the employee felt the need to do it. By learning why employees perform their jobs in a particular way, the safety professional can better identify root causes of an incident.

Gemba Walks in Practice

Dedicating time and putting forth effort to work side-by-side with employees also brings with it the long-lasting benefits of gained credibility and respect. Consider this example from practice. The facility maintenance technician at a manufacturing site was assigned a loathsome task: cleaning out an in-floor harpoon system that pushed oil and metal shavings out of the machining department through a shallow trench and into a waste tank. The task had a deadline because the company was moving out of the building, and the entity buying it was conducting a final inspection in less than a week. While many staff managers had promised to assign an employee or two to help, none delivered on the day the work had to be performed.

When the author learned about this situation from the technician, he went home, changed into clothes that could get dirty and returned to spend 9 hours helping complete the task. Word spread quickly that the new safety guy was willing to leave his cushy cube and get dirty. Employees knew this had helped turn a 2-day miserable task into a 1-day less-miserable task.

Since then, the maintenance department has been the organization's strongest safety advocate. When the safety department wants or needs to change a safety procedure, an OSH professional meets with maintenance staff, who typically deliver frank feedback in an open, respectful manner. In the end, maintenance personnel are more accepting of a new safety rule that requires them to change the way they do things because of the relationship that has been built.

In practice, the author has found it better to not formalize Gemba walks with checklists, clipboards, cameras or similar tools. Keeping things simple and informal (e.g., paper-free) reduces the intimidation factor, leading employees to be more honest and open in their communication.

Incorporating Leadership Skills

Although safety professionals themselves may not feel like part of their organization's management team, employees often view the safety department as a part of management. After all, safety professionals make rules and expect people to follow those rules.

If safety professionals can acknowledge that they are perceived as management, then they can also understand why their leadership style matters. To get employees to buy into their programs, OSH professionals can follow some basic concepts of effective leadership. American Management Association outlines several actions that can be applied to safety management and Gemba walks (Schaefer, 2014).

Form Relationships Built on Trust

In safety, building trust means spending time at workstations to illustrate through actions that the safety professional is interested in how employees perform the work the way they do and why employees perform their work the way they do. With this knowledge, the OSH professional can strive to ensure that safety solutions align better with how work is actually performed.

Show Them Respect

Creating new policies that affect a job without first learning how and why people work a certain way shows a lack of respect. Many OSH professionals can likely relate to reporting to a supervisor who sets unrealistic rules or expectations because of little understanding of safety. Similarly, workers should never be made to feel inferior to managers or more highly skilled and technically trained employees. By taking hands-on time to learn the basics of how jobs are performed when it is time to create safety policies, the OSH professional shows employees that s/he respects their efforts to meet production goals.

Nurture Creativity

While working with employees and discussing how and why jobs are performed a certain way, em-

ployees will often suggest novel ideas for safety improvements. Responding with genuine gratitude for the suggestions further solidifies a relationship. Once a trusting, emotionally safe relationship is in place and employees know that the safety professional respects them, they will likely be even more open to offering ideas for improving workplace safety.

Build Effective Teams

Team building takes work, but it becomes easier once an OSH professional has become literate regarding the various job functions involved. Suppose an OSH professional wants to form a team to engineer a lifting solution in a tool and die shop? If the safety professional has learned some of the common skill sets around the facility, s/he can readily identify those who are likely to contribute.

Make It Real

Show genuine interest in learning how and why people do their jobs a certain way, and they will feel respected. If the safety professional spends time learning jobs, but never expresses interest or curiosity about that job to employees, employees will become less likely to provide open and honest feedback in return. People like to talk about what they do for a living and why it is important, so it is best to ask many questions and listen more than speak.

An OSH professional can consider several elements when selecting a job for a Gemba walk. These include investigation findings, incident history, risk assessments or simple curiosity. A word of caution: Some jobs take years of training to perform proficiently. If an OSH professional approaches an employee who performs such a job and announces that s/he would like to spend a day or two learning the job, the employee may view the request as flippant or as not fully appreciative of the skill required to do the job. Therefore, the OSH professional must take care to communicate in such a way that the employee understands that the OSH professional is simply seeking a basic understanding of the job.

Some safety professionals may think they will not be able to learn various jobs in their organization. For these folks, TV personality Mike Rowe can be an inspiration. Rowe's programs (*Dirty Jobs* and *Somebody's Gotta Do It*) show him learning how to do other people's jobs. He never pretends to become an expert, but he works to learn (and tell viewers) what the job is like. Rowe may seem like a person born with a wrench in his hand, but he actually was a choir member who became a professional opera singer before landing on TV (Mike Rowe). Thus, to practice Gemba walks effectively and gain employee respect, an OSH professional must plan ahead, dress for the task and be willing to admit lack of knowledge.

When selecting a job for a Gemba walk, one must also consider the hazards involved. For example, Bureau of Labor Statistics (2014) data show that the fatality rate in the agriculture, forestry, fishing and hunting sector was 22.2 fatal injuries per 100,000 full-time equivalent workers in 2013. Should safety professionals who work in these industries realistically be expected to perform these hazardous tasks? The answer is yes. If a job is so inherently hazardous that the company safety professional is unwilling to do it, why should anyone else be willing to do it?

In these cases, the safety professional should train for the job and learn safe practices from those who perform the work before attemping any job activities. If it is simply impossible or infeasible to perform the tasks (e.g., lineman), then one can arrange to be a regular observer.

Another effective approach is to join a group of new employees for their basic training, then spend time on the job. Essentially, those employees for whom the safety professional will write safety programs will teach the safety professional how to perform the work safely. In this manner, a safety professional will learn how and why the job is performed a specific way, and s/he will be able to evaluate new employee training. Whether the job entails working near rail cars, performing a job at height or working near machinery, once the OSH professional has completed the training, s/he will know that new employees are being trained properly or be able to identify areas for improvement.

Conclusion

The use of Gemba walks and experiential learning can deliver great rewards and become an valuable tool for advancing safety initiatives. The time and effort spent with employees learning about their day-to-day tasks is an investment in the future of an organization's safety and in one's proficiency as a safety professional. A safety professional's ability to create meaningful, realistic safety programs will profit, because employees gain a much greater appreciation of the safety professional, and the safety professional develops a much greater appreciation of employees' daily challenges. **PS**

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