Worker Insight (WI) is a frontline interaction exercise founded on engagement and trust. Workers are placed at the heart of safety decision making. The focus is on understanding success and the many things that go right. This includes identifying the hurdles to successfully completing work so that they can be addressed. A Worker Insight (WI) is one of the tools used to engage with frontline workers.

So what is it?

It's a facilitated session that aims to find solutions by engaging those that do the work. It can be facilitated by a supervisor, manager, employee, contractor. It's a structured process of discovery of work conditions that either help or hinder work performance. It can be facilitated by anyone, anywhere, whether it's on site or in the office.

Before you start

When to use the tool:

When a situation, task or process isn't working as well as it should or even to understand normal work activities that are working well.

Who to include:

A cross-section of people familiar with the task would be preferable and anyone else that you feel would add value. It should include a selection of people that do the task. They will have first-hand knowledge of what helps and hinders the task being done successfully.

What you'll need:

- A quiet and safe space that is suitable for the size of your group (8-10 pp). It can be conducted anywhere, including on site where the situation, task or process is undertaken.
- Something to take notes on - you can use the paper form, for larger groups use the Worker Insight board (GA-FRM-HSE-157 Worker Insight Tool) or any other surface big enough to write on. Just make sure that everyone can see.
- Something to write with - you'll need to note all of the ideas and solutions so make sure you have a pencil, pen, or white board marker.
- A camera - photos of the session and the notes (when written on a board) help you to share the learnings. The camera on your smartphone would do the job.

How long you'll need:

From 15-20 minutes up to 30 mins. The time taken depends on many factors, including the complexity / risk factor of the work activity, the size of the group and how in-depth you want to go. Consider these factors when planning your session.

The Process

01. Topic

The session should start with a quick chat about the context (the overall task) as well as the purpose (the reason you're discussing the issue). This helps you explain why there's a need to create a better solution.

For example, say you're running through an issue that occurred from controlling access to the site. You would lead with 'controlling access to the site' as your context. The purpose would then be why you're here, which could be as simple as 'find better ways to do the task'.

How to do this:

Establish the context and purpose - the overall task you want to discuss. (i.e., 'controlling access to the site'). Enter this in the topic section of the WI Board/form.

Talk about the issue that led you to run this session. Has an incident occurred? Have we identified a workaround?

How to get the most from the session:

- Your group is more likely to be open and honest if they feel you're also being open and honest. Feel free to share your own experiences and mistakes you've learned from related to the topic.

- Attack the process, not the workers! This isn't a blame game If workers start pointing fingers, shift the conversation back to the process by looking at the what, not the who.

- There are no bad ideas – getting off to a strong start is important. Ensure workers feel comfortable by taking everyone's ideas on board. Create a psychologically safe environment allowing participants to discuss the topic openly.

02. Insights

Once you've established the topic, now's the time to discover all of the insights relevant to the topic.

Asking the right questions is the heart of gaining a deeper understanding of what is helping and hindering work. It provides people with the opportunity to explore what is contributing to successful work and what is making work more difficult than it needs to be.

Open-ended curious questions invite people to contribute their ideas and solutions, and where this happens, greater engagement and ownership for safe work performance takes place.

The central question, from where all the sub questions are developed, is:

"What tools, resources and strategies do people rely on to succeed, and what conditions and constraints make this difficult?"

Some open-ended questions to ask include:

1. What helps or hinders the successful completion of the task?
2. What tools, resources, and strategies do people rely on to achieve success?
3. What conditions and constraints make work difficult?
4. What mechanisms are in place to understand how success is created/challenged?

Any insights that are discovered in this process should be noted down in the insights section.

How to get the most from the session:

- Ensure that the least experienced workers are given the opportunity to contribute.
- Don't "give the answer", support the team to discover solutions themselves.
- Ask curious questions and to really inquire into the situation and not make assumptions.
- Keep an eye on how comfortable workers are with sharing. You want workers to feel free to participate. Remind the group that it's about finding faults in the process and all ideas are encouraged.

Once all of the insights have been discovered, discuss, and rank them as poor, fair, good, or excellent. Each worker takes turns in ranking each insight. Once all of the workers have had a turn, count up (tally) the results.

- It is crucial that when ranking the insights, that each worker contributes, starting with the least experienced worker. The most experienced worker goes last. This way, the more experienced workers don't unintentionally influence the results of the ranking.

03. Actions

Once the Insights have been ranked, identify the ones that ranked highest for poor and fair. Next, brainstorm solutions to address those insights. Next agree on actions and list them in the Actions section of the WI Board / Form. Be sure to assign responsibility and a date for completion.

How to get the most from the session:

- Recognise the highest-ranked insights in good / excellent and provide reassurance to the group that this is working and continue to do so.
- If possible, starting with the least experienced worker, let the group talk through the ideas.
- As the leader you can assist with suggesting who might best be able to carry out the Action.

04. Review Date

Once the Actions have been listed and due dates established for completing those actions, determine an appropriate date to follow up with the workers to review the effectiveness of the applied insights. List the date in the Review Date Field.

05. Future State

As a group, discuss the effects of the changes and how they might improve the situation. Record in the Future State field, the expected improvement to the task once the insights have been applied, and the estimated improvements to safety, quality, and productivity etc.