Operational Assessment Overview

A bounded assessment helps your team understand why an operation is missing its intended performance and what evidence is needed before a change is approved. Coleman Efficiency compares documented process, floor execution and system records to identify where they diverge.

Begin with the decision

Examples include whether a recurring queue is caused by replenishment, ownership or equipment availability; whether a WMS workflow supports the work; or whether a perceived capacity shortage persists after timing and exception handling are examined. Discovery narrows the question before observation begins.

What we examine

Area	Questions the assessment can test
Flow and handoffs	Where do receiving, putaway, replenishment, picking, staging or shipping wait? What changes across shifts?
Inventory and exceptions	Do physical locations match records? Who owns shortages, discrepancies, rework and aging backlog?
Labor and equipment	When does demand peak? How do travel, idle time, charging, downtime and work allocation affect availability?
Systems and devices	What does the operator do in WMS, ERP, TMS, tablets or scanners? Which workarounds bridge missing information?

Observe

Walk the agreed process with operators and supervisors. Compare instructions and interviews with representative floor observations, event timestamps, reports and equipment records. Record the period, shift, source and limits of each observation.

Define

Confirm the process boundary and baseline. Trace possible causes, check alternative explanations and separate observed facts from interpretations. Agree what successful change would look like, who owns the decision and what must be validated next.

Best fit: warehouses, distribution, 3PL, manufacturing-support and transport/logistics operations where process, people, equipment and information must work together.

From Evidence to Action

What you receive

- A current-state process and material-flow map with the agreed boundary and key handoffs.
- A findings register that links each issue to evidence, impact, confidence and remaining questions.
- Bottleneck, exception and root-cause analysis with baseline measures where reliable data permits.
- Prioritized recommendations, proposed owners, dependencies and a practical improvement roadmap.
- KPI definitions, operational requirements and pilot or control plans where included in scope.

Implement

Assessment findings establish the basis for a decision. Implementation support is a separately defined workstream unless included in the agreement. It can cover future-state workflows, SOPs, responsibility assignment, specialist handoffs, a controlled pilot and validation against agreed acceptance criteria.

Sustain

The handover identifies measure owners, exception escalation and a review cadence. A control plan specifies how to recognize drift and who responds. Reassessment can test whether changes hold across shifts and volume conditions.

How the engagement is controlled

Before work starts, we agree sites, processes, shifts, deliverables, access, evidence needs and review dates. Your team nominates an operating sponsor and subject-matter owners. Material scope or timing changes are documented for approval. Findings state gaps in the evidence; estimated benefits remain estimates until validated.

Responsibility boundaries

Client management retains operating, personnel, safety and production-change authority. Coding, configuration, APIs, deployment and production access remain with client IT or qualified specialists. Coleman Efficiency supports operational requirements and process work and remains responsible for its agreed services and its own lawful performance. Equipment analysis does not replace qualified safety, electrical or engineering review.

Next step

Share the operating challenge, location and systems involved in a discovery conversation. Please do not email sensitive operational files initially; we first agree the minimum data and an approved transfer method. John Coleman | Founder & Principal Consultant | john@colemanefficiency.com.

Sample work: Illustrative Sample - Fictional Operating Scenario. The sample demonstrates methodology and deliverable structure; it does not represent a completed client engagement or validated client results.

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