



Walk-Through

Seeing is believing.

Looking for opportunities together on the plant floor, at the hospital site, and across the asset base out in the field beats sitting in an office any day. Meeting where the work gets done is an excellent way to confirm opportunities are present and jumpstart collaborating on the best way to proceed.

1 Walk-Through Preparation

- Sign mutual non-disclosure agreement
- Discuss high-level opportunities
- Agree on sites and schedule
- Decide on team members in attendance (share contact information)
- Provide any background information and data considered helpful (business plans, revenue goals, recent analysis, operational indicators, performance trends, financial directionality, internal initiatives underway, etc.)
- Outline any sensitivities the team needs to be mindful of upon arrival
- Confirm personal protective equipment (PPE) and security clearances needed

2 Out Where The Work Gets Done

- Without interrupting the day's work, our team will be looking at:
 - Workflows
 - Asset utilization
 - Snapshot work observations
 - Ready-at-hand reporting
 - Work configuration & layouts
 - Products and services samples
 - Communication process and tools
 - Technology applications
 - Organizational structure
- Reviewing active project management tools can be illustrative as well:
 - Charters
 - Project Plans and Roadmaps
 - Milestones
 - Risk logs and To-Do lists
 - Performance constraints

3 Post Walk-Through

- Discuss Walk-Through observations and questions
- Confirm the collective team still sees the opportunities
- Request any additional information needed (performance data, experience case examples, financial reports, preliminary team biographies, etc.)
- Catalyft compiles *Comparing Notes* summary to ensure all facts are in order and everyone's in agreement
- Decide on the best way to proceed



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Walk with conviction.

Get a fresh perspective on your business, confirm where hidden opportunity lies in wait, and pick up a few lessons learned from our past experiences.