

The OptiPro Assessment Guide

What a BOSS-based operational assessment actually looks like — what we look for, how long it takes, and what you walk away with.

Every OptiPro engagement runs on the same four-phase framework: Build Understanding, Observe Operations, Solve Systematically, Sustain Success (B.O.S.S.). This guide walks through what happens in each phase during a typical assessment, so you know what to expect before you ever get on a call.

Phase 1 — Build Understanding

Typically 3–5 business days

We learn how your operation actually works — not just the org chart, but the workarounds nobody wrote down.

What's included:

- Stakeholder interviews across shifts and levels
- Current state assessment of the target process or facility
- Review of existing KPIs and available data
- Initial process mapping

Phase 2 — Observation

Typically 1–2 weeks, on site

We go where the work happens. This phase is spent watching the real workflow, not the documented one.

What's included:

- Gemba walks across shifts
- Time studies on key process steps
- Shadowing of operators and team leads
- Direct workflow observation and notes

Phase 3 — Solve Systematically

Typically 1 week, off site

We find the actual root cause and build a fix that's been tested for cost and impact before we recommend it.

What's included:

- Root cause analysis (5 Whys, fishbone)
- DMAIC project structuring where applicable
- Prioritization of recommendations by impact and effort
- Cost-benefit analysis for major recommendations

Phase 4 — Sustain Success

Ongoing, defined at handoff

A fix that only works while we're in the building isn't a fix. This phase builds what keeps it working.

What's included:

- Standard operating procedures (SOPs)
- KPI dashboards
- A KPI tracking cadence with clear ownership
- Leadership coaching for the team that owns the process
- An audit plan your team can run going forward

How To Prepare Your Team

Assessments work best when your team knows what to expect. A few things that help:

- Let shift leads and floor staff know an assessment is happening — observation works best when it isn't a surprise.
- Have recent KPI data available, even if it's informal or incomplete.
- Identify one point of contact who can answer scheduling and access questions.
- Be candid about known problem areas — the assessment is more useful the less it has to uncover on its own.

OptiPro Analytics Consulting — Houston, TX — We help organizations uncover hidden constraints, improve operational performance, strengthen safety, reduce waste, and build systems that continue performing long after the engagement ends.