

# Case study: Documentation & Training on Work Processes

## Background

- Fast growing business (4x volume growth projected in next 3 years) planned to quickly relocate manufacturing out of California to reduce cost
- The company relied heavily on “tribal knowledge” vs well documented processes and controls. Thus, management was very concerned about the risk of not maintaining the desired product characteristics in the new facility
- Retained Saphineia to document existing processes to reduce risk associated with the upcoming move to a new facility

## Activities

- Conducted interviews with key personnel to capture critical process knowledge
- Observed workflows and processes to document best practices
- Developed standard work documents and reaffirmed content with plant floor operators to serve as training guides and operational references
- Provided ‘technology transfer’ of the tools to the client

## Results & Benefits

- ✓ Standard work documents provide structured guidance, making training more effective for both new and existing employees
- ✓ Clearly defined processes ensure that key product characteristics will remain consistent, preserving consumer satisfaction
- ✓ Shifting from tribal knowledge to standardized documentation creates a strong foundation for future growth and operational efficiency
- ✓ A well-documented knowledge base will help facilitate a smooth and efficient relocation while minimizing operational disruptions

Client: Dairy Manufacturer  
Project : Documentation & Training

**FILLER ROOM PRE-FLIGHT CHECKLIST**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Conveyors** Y N N/A Parts Missing / Issues with Setup

1	Turn conveyors on, make sure the line is clear			
2	Set to correct recipe for SKU being			
3	Verify that all photoeyes are functioning			
4	Ensure guardrails are set to proper width for jar size			

**Filler** Y N N/A Parts Missing / Issues with Setup

5	Fill and Stage 3 buggies			
6	Prime pump and load filler			
7	Prayer			
8	Set nozzle spacing			
9	Set the dial for the correct amount of jars			
10	Set fill weight level to target jar weight			
11	Verify fill weight of several jars (fill and weigh, adjust piston height as needed)			

**Metal Detector** Y N N/A Parts Missing / Issues with Setup

12	Plug in metal detector			
13	Verify it's set to the right parameters			
14	Run a check after filler set up			

**Copper** Y N N/A Parts Missing / Issues with Setup

15	Set copper hopper and drum with lids			
16	Turn on copper			
17	Run a sample jar (mechanic to make minor adjustments as needed)			

Supervisor/Lead: \_\_\_\_\_ Sanitation: \_\_\_\_\_

**ONE POINT LESSON**

**SUBJECT:** Cap Inspection and Rework

Estimated Impact by learning the lesson in:

Safety	Quality	Delivery	Cost	Growth	Productivity
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**SPECIFIC AREA(S) OF APPLIES TO:**

**PROBLEM:** Missing Lids  
Lids over tightened

**MAIN RISK INVOLVED:** Jars opening in case  
Product spilling on the line

**CORRECT ACTION:**

Watch jars coming out of copper  
Remove jars without lids and place to the side  
Pick up jars and gently twist lid counter clockwise to ensure lid is secure; if lid is loose, place to the side

Remove loose lids  
Place the jars back on the conveyor before the copper where there are gaps

**WHAT RIGHT LOOKS LIKE**

**Standard Work Document**

**Step 1:** Add 23 blocks of butter to Melting Vat 1 by adding 8 blocks to start, then adding additional blocks as melting creates additional space

**Step 2:** If making 2 batches: Add 23 blocks of butter to Melting Vat 2 following the same process

**Step 3:** Add AMF to Cooking Vat 3:  
1. Connect the transfer pump and transfer the contents of a full tote into cooking vat.  
2. Zero the tote scale (if not reading 0)  
3. Connect the transfer pump to the tote on the scale and pump until the weight reads out -704.5 lbs.

**Step 4:** If making 2 batches: Add AMF to Cooking Vat 4

**Step 5:** Start filling out production record for batches being made

**Step 6:** When butter has completely melted, transfer into cooking vat 3  
Record time on Pasteurization Record sheet as "Fill Start Time"

**Step 11:** Procedure (SW): If Moisture check fails, continue to cook and recheck moisture every 30 minutes until the moisture check passes (<0.67%)

**Step 12:** Return to cook room and note time on Pasteurization sheet as "Cook end time"