WHS DOCUMENTS & TEMPLATES

DOC-WAD-TPL · Work as Done Review Kit

Product Overview

For: Workplaces of every kind: supervisors, team leaders, managers and WHS advisers who own procedures, safe work instructions and SWMS or equivalents

Version 1.0 · 15 November 2026

Find and close the gap between how a task is written down and how it is really done: watch the task, ask the crew, sort each gap, and fix the procedure or the conditions with the people who do the job.

Every procedure, safe work instruction and SWMS or equivalent is a plan. Real work meets missing tools, breakdowns, night shifts and short-staffed days, and people adapt. The gap between work as planned and work as done is normal, and it is not the same as rule-breaking, but it has to be found and talked about, and it can never reach a critical control. This kit gives supervisors and managers the tools to do it.

The task observation guide and record compares a task with its procedure step by step, edges included (night shift, breakdowns, start-up, contractors and short-staffed days). The conversation question card (A4, with an A5 copy for the pocket) holds curious, non-blaming questions. The gap sorting guide asks three questions that lead to fixing the procedure, fixing the conditions or, last, a performance conversation. The Excel procedure gap register tracks each gap to close-out. The procedure review and rewrite checklist and the learning team facilitation guide and record turn what the crew knows into a better procedure.

Written to work in any country, with Australian law as the worked example. The guide says what to check where you work. In Australia, its state and territory notes show where the law differs, including the regulator to contact. Made by Orana Skills Centre.

SAMPLE

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How to Use This Kit

Work as planned and work as done, and which tool to use when

1 What this kit is for

Work as planned is a task as it is written down: the procedure, safe work instruction, SWMS or equivalent, or training. Work as done is how the task really goes on the day. Plans are written for an ideal day, with the right tools, enough people and nothing going wrong. Real days bring late parts, breakdowns, night shifts, contractors and short-staffed crews, and people adapt to get the work done.

So a gap between the two is normal. It is not the same as breaking the rules: most of it is skilled people making the work work, around a procedure that is out of date, does not fit the site, or cannot be followed with what they have. The gap becomes dangerous when nobody talks about it, when it grows quietly over time, or when it reaches a critical control, which must have no gap at all.

This kit helps supervisors and managers find the gap, understand it, and close it, by fixing the procedure or the conditions with the people who do the job. Use the tools in the table below as you need them; they work together through the procedure gap register.

Tool	When to use it
Task observation guide and record	To watch a task from start to finish against its procedure: a routine check, a new or changed procedure, or a task with near misses
Conversation question card	Any time you talk with a crew about a task: after an observation, at a toolbox talk, or on a walk around
Gap sorting guide	For each gap found, to decide the fix: the procedure, the conditions or, last, a performance conversation
Procedure gap register	To record every gap from every source and track it to close-out, and to review at WHS meetings
Procedure review and rewrite checklist	Whenever a gap leads to a change of procedure, and at each scheduled review
Learning team facilitation guide and record	For a task that is hard to do as written, keeps showing up in the register, has had an incident, or is about to change

2 How to use it

Step	What to do
1	Put in your logo and business name, and fill in the placeholders. Print the question card at A5, or keep it on a phone.
2	Choose where to start: a task that is hard to do as written, has had near misses, is done at night or by contractors, or is about to change.
3	List the critical controls for that task from your risk assessment, SWMS or equivalent, before you look at it.
4	Observe the task with the task observation guide and record, and talk with the crew using the question card.
5	Enter every gap in the procedure gap register, and sort each one with the gap sorting guide.
6	Fix the conditions, or rewrite the procedure with the people who do the job using the review and rewrite checklist.
7	For a task with many gaps or a recent incident, run a learning team with the facilitation guide.

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[Company name]

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Task Observation Guide and Record

Watch a task from start to finish against its procedure, and note how it really goes, step by step

Task observed		**Procedure, SWI, SWMS or equivalent (name and version)**	
Site and work area		**Observed by**	
Date, time and shift		**Crew (roles, or names if they agree)**	

How to observe

- Ask the crew first. Say why you are there: to learn how the job really goes, not to check up on anyone.
- Have the procedure to hand. Watch the task from start to finish, from a safe place, without directing the work.
- Note each difference from the procedure as it happens: what the procedure says, and what happened.
- Afterwards, ask why, using the conversation question card. Judge each difference: safer, the same, or riskier.
- Thank the crew, tell them what happens next, and enter every gap in the procedure gap register.

Stop the job only if it is unsafe

Stop the job only if someone could be hurt now, or a critical control is missing or not working. Make it safe, then talk about why it happened. Every other difference is noted and talked about afterwards.

1 Before you watch

Check	Yes	No	N/A	Notes
The current procedure, SWI, SWMS or equivalent for the task is to hand	☐	☐	☐	
The crew knows why you are watching, and has agreed	☐	☐	☐	
The critical controls for the task are listed in section 3	☐	☐	☐	
You have the PPE, induction and access the area needs, and a safe place to stand	☐	☐	☐	

2 Step by step

One row for each step of the procedure, and a row for any step the crew does that the procedure does not have.

Step	The procedure says	What happened	Why (ask afterwards)	Safer, same or riskier?
1				☐ Safer ☐ Same ☐ Riskier
2				☐ Safer ☐ Same ☐ Riskier

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END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Find and close the gap between how a task is written down and how it is really done: watch the task, ask the crew, sort each gap, and fix the procedure or the conditions with the people who do the job.

What the full product contains

- **Excel procedure gap register: the task, procedure, gap, source, critical control, risk from the matrix, the action (change the plan or change the work), owner, due date, closed and crew told, with overdue and critical gaps flagged**
  02_TEMPLATE/Procedure Gap Register.xlsx
- **Task observation guide and record: how to observe, before you watch, step by step (the procedure says, what happened, why, and safer, the same or riskier), critical controls, the edges (night shift, breakdowns, start-up, contractors, short-staffed days), what was found and sign-off**
  02_TEMPLATE/Task Observation Guide and Record.docx and .pdf
- **Conversation question card: curious, non-blaming questions about how the job really goes, and how to ask (A4, with an A5 copy for the pocket)**
  02_TEMPLATE/Conversation Question Card.docx and .pdf
- **Gap sorting guide: three questions for each gap, critical controls with zero gap, and the fix they lead to (the procedure, the conditions or a performance conversation), with a record of the decision**
  02_TEMPLATE/Gap Sorting Guide.docx and .pdf
- **Procedure review and rewrite checklist: rewrite with the people who do the job, protect the critical controls, test it on the job, version control and brief the crew**
  02_TEMPLATE/Procedure Review and Rewrite Checklist.docx and .pdf
- **Learning team facilitation guide and record: set-up, ground rules, a 60 to 90 minute session plan, prompts, and a record of what was learned and what will change**
  02_TEMPLATE/Learning Team Facilitation Guide and Record.docx and .pdf
- **The conversation question card, A5 PDF for printing pocket size**
  02_TEMPLATE/Conversation Question Card (A5).pdf
- **How to Use This Kit: how to complete and adapt it, the law in brief with Australia as the worked example, records and every placeholder**
  01_START_HERE/How to Use This Kit.pdf
- **Read Me First, Product Overview, Permitted Use Terms and Version Information**
  01_START_HERE/ (PDF)

Formats

- Word (.docx), editable, with your logo and business name in the header
- Excel (.xlsx), editable, with dropdowns and formulas (no macros)
- PDF copies of the Word documents, for printing blank
- A5 PDF of the card, for printing pocket size
- Delivered as a single ZIP download

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