



**Dear Friends and Clients,**

Sarah is an excellent technical writer. She enjoys reporting on complex situations and she is proud of her ability to clearly present information. She loved her job preparing reports for a large institution, but felt unprepared when she was made manager of her group.

While she maintained high standards in her own work, Sarah had trouble articulating those standards for her team members. She said that she wanted them to strive to do excellent work, but she struggled to define "excellence."

During coaching, Sarah decided to put her communication skills to work in leading her team. As a starting point, she drafted a series of checklists to establish standards for some of the documents the unit prepared routinely. Each checklist identified research protocols and the key elements to be included in certain kinds of reports.

Sarah used the checklists not only to serve as report templates, but also to shape a dialogue with her writers. After reports were completed, the group revisited the checklists, evaluated their usefulness, and found ways to make the lists even more helpful and complete.

At the start of her management job, Sarah felt reluctant to criticize her writers. But by focusing regular group discussions on the checklists, she was able to establish a standard of excellence in a way that did not feel harshly personal.

As I will discuss in this Ezine, checklists can be a useful tool whether you are leading a group or organizing your own work.

Warm wishes for a great 2010! -- Bev

**Want to Reduce Errors  
Or Be More Productive?  
Create Checklists!**

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The World Health Organization is urging operating room personnel to save lives by using a simple checklist during surgical procedures. The initiative gained momentum last year when a study showed that reliance on the WHO checklist reduced the rate of deaths and serious complications during surgery by more than a third.

The WHO “Surgical Safety Checklist” specifies 19 steps, some as simple as confirming the patient’s name and the scheduled procedure. Although all the steps are routine, research has demonstrated that, without reliance on a checklist, even experienced surgeons may miss at least one step.

The surgical checklist process is much like the procedure that airplane pilots have followed successfully for decades. Proponents say that the aviation checklists not only prevent busy or distracted crews from forgetting steps, but also promote communication and teamwork.

In professions where lives are at stake, protocols increasingly call for checklists because they break complex projects into manageable parts, and they combat the human tendency to take shortcuts.

Checklists are low-tech tools that also can help the rest of us to become more effective. Here are examples of ways that you might use checklists to make your work go more smoothly:

- **Shape reports.** Use checklists to specify the content, style and organization of routinely prepared reports.
- **Assure accuracy.** Whether you are writing or editing, checklists can assure that your fact checking is thorough. Journalist Craig Silverman offers a free sample checklist on his website, “**Regret the Error.**”
- **Organize events.** If you plan meetings, conferences or parties, smooth the process with a comprehensive planning list. Note every possible element, from invitations and RSVPs, to the nametags and the menu. After each event, review the standard checklist to make sure that it addressed every development.
- **Get packing.** While some checklists include tasks and procedures, others simply describe items that you might need. Ease your travel anxieties with a standard list of everything that you might want to take along on a trip.
- **Consider candidates.** Whether you are hiring an assistant or choosing a service provider, make a list of the factors that matter most to you. It may be easier to make a decision if you use the same checklist to evaluate each option.
- **Assure best practices.** Checklists can help you avoid mistakes in challenging situations like conducting employee performance reviews.

Emergency checklists can help you rise to the occasion if the worst occurs, whether the building is on fire or a hurricane is coming.

**Want more ideas for getting organized?** In addition to providing executive coaching, Bev is available to speak about a broad range of issues related to your work life. Visit her website at **[www.ClearWaysConsulting.com](http://www.ClearWaysConsulting.com)** or email to **Bev** directly. Bev is affiliated with **Executive Coaching & Consulting Associates.**