Reach record business results and avoid costly mistakes…

You know those near misses or mistakes that jolt you into wide-eyed disbelief or give you a cold sweat at night?

Those near misses or mistakes that, if people did what they should do, would never happen?

Yet they are easily avoided, if only people followed your system, followed your rules, followed your processes.

So why don't they follow your processes, every time?

Because we (the human race) don't like checklists and don't want to use them. Following checklists is beneath our skills, knowledge and capabilities.

And yet...

...would you fly on a plane if you knew your pilot ignored the pre-flight checklist and 'winged it'? Would you want a surgeon to operate on you if they didn't follow a life-saving checklist recommended by the World Health Organisation?

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In a nutshell

You, me, everybody would prefer not to follow a checklist, yet they keep us alive in many walks of life. Checklists can keep your business alive too and help it thrive.

Here's a proven solution for you

Set up and insist on the use of a checklist for the business critical tasks in your business. Even if people know what they should be doing.

5-point checklist saves 8 lives and £1.5million...

The number of tasks happening every day in every intensive care unit (ICU) in every hospital is vast.

In 2001 a consultant decided to test a checklist on just one of the many ICU tasks – the insertion of a central line (a long needle-sized tube into a vein for delivering drugs and fluids to patients).

The simple 5 five-point checklist:
1. Wash your hands with soap
2. Clean skin with antiseptic

Hand washing checklist saves lives

3. Put sterile drapes over the patient
4. Wear sterile clothing including mask and hat
5. Fit a sterile dressing to the site of the central line
   Obvious, no-brainer instructions to doctors who know this already.

Shocking failure rate…

And yet nurses reported that with **more than a third** of patients the doctors skipped at least one step.

Insist it happens…

The hospital then authorised nurses to stop doctors if they failed to follow every step.

12 months later the '10-day line-infection rate' went from 11% to zero. 15 more months later and the checklist had prevented 43 infections, prevented 8 deaths, and saved £1.3million in post-infection costs.

Soap and a 3-step checklist saves lives…

In the slums of Karachi, Pakistan in the 1990s, virtually all water sources were contaminated with sewage. 1 in 10 children died before they were 5 years old. Diarrhoea was a major cause.

A young public health worker, Stephen Luby, had an idea that anti-bacterial soap might help.

The idea failed. Anti-bacterial soap was no better than normal soap.

But the checklist worked…

Luby's test achieved a better use of soap, reduced the rate of diarrhoea by 52%, and reduced pneumonia by 48%.

How come?

Luby's researchers gave out instructions and managed to make the use of soap more systematic.

The checklist they shared:
1. Wet both hands completely
2. Lather well
3. Rinse all the soap off
   Simple and obvious, yes.

But, in the difficult circumstances of the Karachi slums it was life changing – even if they then mostly dried their hands on their clothes!

Checklists help manage massive complexity…

3 storeys underground, 11 storeys above ground, 3,885 tons of steel, 16 lift shafts, 47 miles of conduit, 64,000 feet of copper piping, 95 miles of electrical wire.

And when complete the building has to withstand an earthquake.

Dozens of different trade jobs to be completed on every floor. Many different machines are used. Up to 300 people on-site at any one time, all working in sequence from floor to floor and all with their own safety, design and technical requirements. All having to work around unexpected problems.

The scale of the complexity is overpowering. Too much for one person in charge to manage.

But these complex buildings never seem to fall down. All because the business of building them works – failure is not an option for the builders of these buildings.

One checklist dominates the many complex building projects – the communication checklist.

The communication checklist dictates how all the specialists get agreement with each other, especially when something does not go to plan.

Another checklist for very clever people…

Surgeons are, thankfully, very clever people. Their training is long, intensive, thorough.

A renowned surgeon was asked by the World Health Organisation (WHO) to help save lives in operating theatres all over the world.

After considering many options, the simple solution of a 'surgical safety checklist' became a WHO directive.

Nobody wants to use checklists, not even the author!

How does the surgeon who created the WHO 'surgical safety checklist' feel about using his own checklist in his own operations?

He doesn't really want to!

He doesn't believe the checklist will make any difference.

And yet he tries it.

Another checklist success

Each and every week this checklist prevented a missed step that could have caused disaster. In his words:

"I am not sure how many important issues would have slipped by us without the checklist and actually caused harm."

In one operation, the 'pre-op' checklist more than did its job:

"…the checklist saved my patient's life."- Atul Gawande

Very clever people like surgeons shouldn't need checklists, but they do.

Checklists work. Checklists work reliably when people use them reliably.

So shouldn't you and your business make better use of checklists? Even if everyone would prefer not to use them?

"Just ticking boxes is not the ultimate goal here. Embracing a culture of teamwork and discipline is." - Atul Gawande

Key but difficult insight…

Getting your people to use checklists in a disciplined way is tough – even for the checklist creator.

Checklists require discipline and teamwork.

Who wants to fly on a plane with no pre-flight checklist?

One of the reasons air travel is the safest form of travel is the disciplined use of checklists.

In the downloadable tools you'll see how checklists helped 155 people survive the Hudson River crash in New York in 2009.

The Hudson River flight proves the value of teamwork, discipline and checklists. The WHO 'surgical safety checklist' does the same.

TIME TO DISAGREE

"There's just no way I can get my people to use a checklist every time they do a job they do every day."

Your challenge is a common one.

Even on a plane or in surgery, where the use of the checklist will save lives, you find resistance to using a checklist.

Most humans want to avoid using checklists. Especially if it's for something they do every day or several times a day.

Two things can help you:

1. Keep your focus narrow. Start by insisting everyone (including you) use a checklist on your business critical jobs only – just work out what your business critical jobs are. Check out the downloadable tools for help in working out your business critical tasks.
2. Make sure your checklist physically shows up at the right time, at the right place in the right way.
   Does the 'load the van' checklist show up on the van door?
   Does the meeting agenda (agenda = meeting checklist) show up as Page One of your meeting folder?

Surgeons, pilots, builders and others use a checklist every day for a job they do every day. Shouldn't your people do the same?

Your business success depends on it.

"My people know what they should be doing – they don't need checklists to slow them down."

A surgeon has to be reminded to wash her hands before an operation.

Are your people more or less likely to know what to do in their job than a surgeon does in hers?

The cost of doing a job wrong, even slightly wrong, can be greater than the savings of doing it right.

This is crystal clear for a surgeon or an airline pilot – lives are involved. But your business could lose a sale or lose a customer if a job isn't done as it should be.

At a recent Rugby Premiership match a friend of ours attended, it took more than 45 minutes to be served at the bar, despite joining the queue before the first half was over.

The checklist for setting up the bar wasn't followed and so they did not stock-pile drinks in advance of half time.

The result? Hundreds of unhappy customers because a simple, obvious checklist wasn't followed.

"Even if I insist my people follow a checklist they'll soon go back to working without them."

Do you really want to allow business critical jobs in your business to happen without a checklist?

To begin with using a checklist may feel alien. Your job is to help your people make the disciplined use of checklists a habit – something that happens automatically.

Use the habit checklist(!) in the tools and resources download to help you.

Tell me more

We love the straightforward and 'jaw-droppingly' simple approach to checklist success proposed by Atul Gawande in his book 'The Checklist Manifesto ... how to get things right.'

We hope we've inspired you to build checklists into your business daily and make your business more successful.

If we have, please check out this practical, no nonsense book. And download the supporting tools and resources for this edition of Business Bitesize.

Use the Business Bitesize Support Tools And Resources

to help you make the most of this edition of Business Bitesize – go here: www.businessbitesize.com/pentlands

Your feedback is important to us.

We'd love to know what you think of this edition of Business Bitesize and how you use it or plan to use it. Also we'd welcome your suggestions for future editions of Business Bitesize. To give us your thoughts please use the simple feedback form here: www.businessbitesize.com/pentlands

4 helping hands for you…

Your business will avoid mistakes and see results improve when you habitually use checklists on your business critical tasks.

Lead from the front, be seen to use the checklists yourself, and you set an example your team will follow.

You'll then be on your way to making checklists a valuable part of running your business.

Here are four helping hands to get you started with the power of checklists:

1. **Choose a business critical task that needs a checklist**
2. **Build a checklist for your chosen business critical task**
3. **Test and refine your checklist with your people**
4. **Make disciplined use of your checklist a habit**

ULTIMATE ARGUMENT: "How do I know the use of checklists will pay off for my business?"

Like the surgeon who saw his checklist prevent a missed step every week, you'll see missed steps avoided, too.

And as your use of checklists becomes habitual you'll see improved standards and improved results.

STOP: treating checklists as something you use occasionally for new people or new tasks.

START: using checklists habitually to drive up standards and improve performance on business critical tasks.

Make checklists a habitual part of running your business and achieve record results…

If checklists work in the slums of Karachi and halve the rate of illness, and if checklists bring success to surgeons, airline pilots and builders, they'll help you and your business succeed too.

Don't let our natural human tendency to ignore checklists derail your efforts at using checklists for your business critical tasks:

1. **Choose a business critical task that needs a checklist**
Work on 1 or 2 business critical tasks and work with your team to make your checklists work.
Warning: A checklist for everything will prevent your team from committing to the habitual use of checklists, so start with just 1 or 2 business critical tasks.
Check out the tools and resources download link below for guidance on how to choose your business critical tasks.

2. **Build a checklist for your chosen business critical task**
Ask your best person to carry out your business critical task in the best way they can. Whilst they work on the task, you create the checklist, recording all the points of action.

3. **Test and refine your checklist with your people**
Fine-tune your checklist using the 'checklist rules' suggested in the tools and resources.

4. **Make disciplined use of your checklist a habit**
Discipline is tough. But teamwork and a focus on the science of habit can help you ensure your checklist gets used every time your business critical task happens.
You'll find the science of habit checklist in the tools and resources.

For further details on these four valuable insights and more, please visit the tools in the link below.

Your next steps:

It pays to use a checklist every time you perform a business critical task in your business.

A checklist helps prevent mistakes, drives standards up and drives results up too.

Build and use a simple checklist for the important jobs in your business and you'll experience greater success.

Start by seeing checklists as a fundamental part of running your business well.

"Checklists… remind us of the minimum necessary steps and make them explicit. They not only offer the possibility of verification but also instill a kind of discipline of higher performance" – Atul Gawande

More tools and information for you:

As well as the checklist here, you can use the exercises, checklists and tools by downloading the supporting resources.

Together they'll help you make more of this bitesize business breakthrough.

YOUR SUPPORT TOOLS ARE HERE: Go to the link below and you'll find a selection of practical support tools to help you work out how to make the most of checklists for the business critical tasks in your business.

Find the support tools to help you here - www.businessbitesize.com/pentlands

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Reach record business results and avoid costly mistakes...

- **What is a 'business critical task' for your business?**

- **How do you drive out human error on tasks that could make or break your business?**

- **How serious do you take the use of checklists on business critical tasks?**

CONTENTS:

STOP treating checklists as something you use occasionally for new people or new tasks

START using checklists habitually to drive up standards and improve performance on business critical tasks

1. The single most important checklist question you must ask if you are truly serious about avoiding costly mistakes in your business.

> Which everyday activity if not carried out just once could have a catastrophic effect on your business?

Every business in the land has operations, procedures and activities that are carried out every day, every week, every month.

Some of these activities are useful for the smooth running of other background processes and others are business critical.

For example…

In a small office, having the printer paper or ink run out is an irritation that has an impact on the smooth running of that office that day. Easily remedied by a quick trip to the local stationers to stock up.

- Irritating to the team? **yes**

- Who is affected by this?

    o your team - who are waiting for that paper and the ink to get on with their day to day admin tasks? – **yes**

    o your customer - who will be unaware of the paper and ink issue? - **no**

- Business critical? **no**

In a printing business, having to restock on paper or ink in the middle of a big print run for a client is a different kettle of fish altogether.

- Irritating to the team, very stressful, deadline likely to be missed? **yes**

- Who is affected by this?

    o your team - who are now very stressed as the workflow/delivery time of a customer's job has been interrupted, which in turn has a knock-on effect to all the other jobs that day also? – **yes**

- o your customer - who may receive their order late and your other customers whose jobs may be delayed whilst trying to catch up? - **yes**

- Business critical? **yes**

For this printing business, investment in skilled staff, state of the art equipment and a classy office won't win them more business if they have failed to deliver on time – even just once.

A business critical stage in their processes was missed out.

Why, when everyone knows you can't print without paper or ink was a print run scheduled in without paper or ink to do it with?

- maybe the team were under time pressure and feeling stressed?

- maybe a tricky job was looming and they were focused on solving that challenge?

- maybe the person who always remembers stuff like that was off that day?

A well thought-out, well placed and timely checklist could have avoided this situation.

When could you, should you, use a checklist on business critical tasks?

Warning: **A business critical checklist is specific to your own business. One size doesn't fit all so you must identify the business critical tasks in your business.**

2. The Good Versus The Bad

The 4 vital components that make a GOOD checklist.

1. Precise

2. Efficient and to the point

3. Practical – authored by the people that actively do the job

4. Relevant – composed of reminders of only the most critical and important

tasks

The 4 vital components that make a BAD checklist.

1. Imprecise

2. Vague

3. Impractical - not authored by the people that do the job

4. Perceived as not relevant – too detailed - turns peoples' brains off

As Atul Gawande points out in his book 'The Checklist Manifesto' the power of checklists is limited.

- A checklist can help experts follow complicated procedures safely

- a checklist can make priorities clearer and help people to function better as a team

- HOWEVER a checklist cannot make anyone follow it

A checklist, however good, must have ***buy-in from its users*** – the team must WANT to follow the checklist and understand and have faith in the value of it.

This means the users must also have ***authority to challenge*** missed steps in the checklist – including their seniors (just like the nurses in the ICU who were authorised to stop doctors if they failed to follow every step in the checklist.)

Above all, there must be ***clear evidence*** that, by following the seemingly mundane task checklist on jobs that "you could do with your eyes shut", a difference can be made to your task results, your team and your customers.

Atul Gawande presents lots of evidence in surgery, aviation and public health settings – *but how is that relevant to your business?*

For a checklist to gain the confidence of users it must *have made a measurable difference.*

To make a measurable difference you must know where you are starting from.

In the case of the World Health Organisation (WHO), in order to establish the credibility and value of the 'surgery safety checklist', it required hospitals to 'own up' to their post-operative infection rates.

It's not an easy thing to do to formally collate your shortcomings, failures and share them!

To implement effective checklists in your business you must be ready to *face some pain.*

You must:

- establish what **near misses** or **direct hits** which resulted in failure to follow a particular part of a process has cost you, your team and your customers – make the pain and downside obvious

- determine a way of measuring those near misses before and after you have implemented the checklist – make the pain and downside measurable

- involve your team in the entire process – ask them about their own near misses and establish a culture of **getting it right** above **who got it wrong**

3. The Checklist Checklist

✓ **Define what your 'business critical tasks' are and focus on one at a time.**

  Hint – these are the things that have had you waking up in the night with a jolt, that niggle away at you because you know they are a risk but haven't quite got around to addressing them.

  Business critical tasks are also steps that didn't get taken in the past that have lost you customers, team members or revenue.

✓ **Establish what the current measure of these business critical failures is in your business.**

  Hint – How many times have you missed a deadline for delivery? missed a meeting with an important client? had to reissue faulty goods? refund customers? or lost a customer in the last year/six months/month? (you can choose the time frame).

✓ **With your team assess and discuss what steps would have caught these 'cock-ups'.**

  Hint – Was it due to lack of communication? a diversion onto another job part way through? a time constraint? missed training? faulty components? etc.

✓ **With your team create the first draft checklist that if followed would have avoided the failure of the business critical task.**

  Hint – use the good checklist bad checklist elements (section 2) to fine-tune the wording of the checklist and the steps. Concise, clear and relevant is key.

✓ **Implement the checklist and agree a date when you will review the first draft checklist with your team**

  Hint - compare the measurements' 'before' and 'after' results and revisit the checklist for fine-tuning.

4. The Hudson River Story… or what really saved US Airways Flight 1549

When aeroplanes crash, it's usually because a series of unexpected things go wrong all at once, or one after the other. Something dramatic clearly went wrong with US Airways Flight 1549, which lost power in both engines and crash-landed on the Hudson River on January 15 2009. A lot of things went right too.

Capt. Chesley Sullenberger has earned plaudits for "heroism," but that oversimplifies what it took to land the crippled Airbus A320 and get all 150 passengers off safely, before the plane sank. A significant factor that helped everybody aboard Flight 1549 survive was the embedded use of checklists.

Sullenberger may be a model aviator, but it wasn't heroism that brought Flight 1549 down safely. It was rigorous training that's inbred in the U.S. aviation system. Pilots have to fly for years before they can command an airliner, and even experienced pilots must routinely train in simulators and pass "check rides" at least once a year under the supervision of Federal Aviation Administration inspectors. Pilots sometimes complain about overzealous FAA inspectors, but the inspections contribute to a culture of accountability and fastidious attention to detail in the cockpit.

For airline pilots, training focuses on dire scenarios, such as the US Airways crew encountered. Pilots spend their training time doing nothing but flying in all sorts of emergencies. Even emergencies become just another set of procedures when repeatedly trained.

It's clear that because Capt. Sullenberger had confidence in the well-designed checklists and procedures for emergencies, he was able to keep a cool head during this emergency.

Keeping a cool head enabled him to make further vital decisions, not covered in the checklist, that ultimately saved the lives of his entire passenger list and crew. You can read more about the Hudson River Crash here.

5.   The book:

'The Checklist Manifesto' by Atul Gawande

We love this brilliant book 'The Checklist Manifesto' by Atul Gawande

Atul Gawande focuses in on how in a world of greater and greater complexity the impact of human error or omission becomes more and more significant. He explains in this book how the simple and humble checklist when adopted whole heartedly has saved lives in aviation, hospitals around the world, construction, investment banking and beyond.

We hope if you get a chance to read this book you will gain some valuable insights that you can apply to your everyday life at home and at work.