The Humble Checklist

Simple and low tech, the checklist is yet so powerful and vital that everyone from pilots to surgeons uses them.

We have made some adjustments to them so that they form the basis of Goal Driven procedures. They do this because:

* Checklists always begin with the goal.
* They are simple.
* They are quickly reviewed and updated.
* They always specify the Key Performance Indicators.

Here at Petty, Michel and Associates, we have been promoting the use of checklists as a simple tool in practice development since the early 1990s. I remember early on we were working with a business that had offices in many states. We needed a method to manage each office. This was around the time fax machines were becoming more popular. We developed an office manager daily and weekly checklist that the manager for each office would send to the senior manager each week. The senior manager would then meet by phone, or in person, with each manager and review the items on the checklist. It worked well.

It still does in the offices we coach. One doctor with whom we worked with for many years sent in the following success with checklists:

“I always had several checklists. And I made sure each employee had one. I could tell at a glance what was getting done and what was not in my practice. This helped keep my mind clear to focus on the patients and their needs!”

The biggest problem with procedures is that successful ones are not kept in place and done routinely. Seriously… you finally stumble upon something that works, you need to keep doing it! But people get bored and stop doing what was working.

Atul Gawande, an endocrine surgeon, saw the need for checklists in surgery. He surveyed fellow surgeons who said that they did not want to do checklists before surgery. When asked if they wished to their surgeons to use a checklist if they went under the knife, however, almost all said they wanted their surgeons to use a checklist!

“What is needed… is discipline.

Discipline is hard — harder than trustworthiness and skill and perhaps even than selflessness.

We are by nature flawed and inconstant creatures. We can’t even keep from snacking between meals. We are not built for discipline. We are built for novelty and excitement, not for careful attention to detail. Discipline is something we have to work at.

Good checklists, on the other hand, are precise. They are efficient, to the point, and easy to use even in the most difficult situations. They do not try to spell out everything–a checklist cannot fly a plane. Instead, they provide reminders of only the most critical and important steps–the ones that even the highly skilled professional using them could miss.

Good checklists are, above all, practical.”

-Atul Gawande, M.D., Endocrine Surgeon, Associate Professor at Harvard. (The Checklist Manifesto)

Each team member – doctor, care provider, support professional -- should keep their own checklists and update them as they improve their procedures. These are their “formulas” or recipes that they use to create extraordinary outcomes each day.

Checklists should be regularly reviewed by another team member, such as a manager, and coordinated with other functions in the business.

**So, review your checklists, keep doing what works, and then do it better!**

*sample*

**Front Desk Coordinator Job Checklist of Procedures**

**Goal: Mission:** to help all our customers achieve their service goals by scheduling them and helping them keep their schedule.

**Goal: Outcomes:** all customers keeping to their schedule, the appointment book is fully scheduled each day, all appointments kept each day.

**Key performance indicators:** % full schedule day/week, Total Visits, % kept appointments, Over the counter collections.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Was this done – Never (1) Sometimes (3) or Always (5) | 1 | 2 | 3 | 4 | 5 |
| \_\_\_1. Always greeted the customer with a smile. |  |  |  |  |  |
| \_\_\_2. Always answered the phone with a smile. |  |  |  |  |  |
| \_\_\_3. |  |  |  |  |  |
| \_\_\_4. |  |  |  |  |  |
|  |  |  |  |  |  |