



# in the moment

# 2024

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# Beating Murphy's Law

By Phil Ramsey

Many leaders in education look to the future with a mixture of excitement and trepidation. It is inspiring to have a sense of vision, picturing what their school or centre could become and the contribution it could make to the lives of children and young people. At the same time, leaders are usually realistic about the possibility that things will go wrong. Murphy's Law—that if something can go wrong, it eventually will—is a fact of organisational life. What can you do to keep people inspired, and stay personally excited, when your best laid plans are being disrupted by unexpected events?



One way to find an answer is to look for an exemplary organisation: one that has been beating Murphy's Law consistently for decades. Author Mike Rother believes that organisations in any industry can learn from a careful study of Toyota, a company with a remarkable record of success (see the Book Review in this newsletter). Toyota is, of course, a manufacturing company, so you might doubt that there are lessons for educators in how they are organised. As Rother points out, though, the key to their success is not the specific manufacturing techniques they use. Other manufacturers have tried to emulate Toyota by adopting their processes without anything like the same success. What is the secret? From Toyota's point of view, no technique or process is going to be a sure-fire winner. Murphy's Law will always intervene. Organisational success depends on *learning*, and Toyota are organised to learn.

## Organising to Learn

Imagine that you need to introduce a new approach in your school or centre. You try it out and, after sorting out some initial glitches, it works better than the old way. The learning period is over; using the new approach you expect better performance. If something goes wrong—which is sure to happen according to Murphy's Law—you might find a fix so that everyone keeps performing. After all, there are children who need to be taught.

People at Toyota take the view that success depends on constant learning and improvement. Prior to introducing a new approach, they will of course do their best to plan and prepare for it to work well. The learning, though, has got to continue. So, Toyota has for decades been teaching all its employees a *kata*, or routine, for making improvements. The principles behind Toyota's *kata* may help you organise your workplace for on-going learning and improvement. What are some of these principles?

*Establish a teachable routine.* How do you make sure people have both the motivation and the ability to make improvements? One way to address the motivational part of that equation is for improvements to become a routine and expected part of the work they do. Making improvements at work needs to become part of life. And help people develop their ability to make improvements by teaching them how to do it: have a way of thinking about improvements that (1) works, and (2) you can confidently teach to everyone.

*Have a proper view of problems and standards.* Because of how they are managed, many workplaces are affected by fear. People fear that standards will be used as straightjackets, where they must be met or some kind of punishment will follow. Falling short of a standard is a problem, so problems are treated as disasters that need to be avoided or hidden. Take a lesson from Toyota. Improvements come about when people solve problems, *therefore it is important to have problems to solve.* If you can't find any problems in your work, something is wrong. Perhaps you aren't really looking. Or maybe your standards are too low. Establishing a standard—especially one that is 'ideal' rather than limited by what seems 'practical'—is a way of bringing new problems to the surface, creating more opportunities for improvement.

*Ground your improvement routine in scientific thinking.* Wherever there is a gap between what we want (a standard) and how things really are, people feel tense. They want to jump to a conclusion, find a magic bullet, or operate off a hunch. Toyota teaches people to act like scientists. That means looking carefully at what is really happening, compared to what you want; identifying the most likely cause of problems; working on one thing at a time, taking a step and then reassessing; going and looking for yourself rather than relying on your own or other people's opinions and hunches; and being content with getting to a goal by taking lots of small steps.

*Take one step at a time.* It will take many steps to completely solve a problem. But that is OK: you are in this for the long-haul. By the time you have completed the first step, Murphy's Law may have resulted in a changed environment, so that you need to reassess where to next. So, don't look too far ahead. Take one step, and then ask, "What next?" How do you take each step? Toyota incorporates that PDCA cycle in its improvement routine: Plan—Do—Check—Act. Plan, or hypothesize, what you think should work based on your analysis of the situation. Then do something by trying out what you hope will work. Check to see what has happened. What have you learned? Pay particular attention when things don't go the way you expected. When you establish what does work, act to embed what you have learned in your practice.

## **A Disciplined Approach**

It is tempting to think that leadership is about genius ideas and inspiration that leads to giant leaps forward in what we can achieve. Toyota provides a different way of thinking. Excellence can be achieved by taking a disciplined approach to improvement. Every day at Toyota, thousands of people are making small improvements to how work gets done. They don't see this as something extra to their work; making improvements is a natural part of every job. And all these small improvements add up over time.

Can you establish a teachable way for people to make improvements? This can give you a way of moving forward with confidence in your work, despite Murphy's best efforts to hold you back.

# Leadership and Improvement

By Phil Ramsey

As discussed in our opening article, Toyota treat improving at what they do as a core part of everyone's work. What role do leaders play in the improvement process? And what implications could this have for educational leaders?

We might like the idea of everyone being on the lookout for creative, new ways to do their job. Is it realistic, though, to expect everyone to be skilled at problem-solving? According to Mike Rother, Toyota are clear that problem-solving for improvement is the work of leaders. In a manufacturing process, the technical operators are busy. Moment by moment they are focused on the skilled work they do. Having them do investigation and analysis on top of that concentrated effort is asking too much. Instead, operators draw attention to emerging problems. Then, team leaders are tasked with identifying patterns and working out how improvements can be made.

How are team leaders helped to do this? As we've noted, Toyota has a routine, or *kata*, that team leaders can follow. This is an established process for making improvements. While it is well thought out and logical, it still needs to be learned by team leaders. For that reason, Toyota has a second *kata*: a routine process of coaching, designed to teach leaders the improvement routine.

Rather than leave it to chance that leaders will know what to do, Toyota has designed learning about problem-solving into its business. Leaders at every level need an experienced coach. A coach will use questions to help the leader learn the improvement process as they are doing it. Questions are used systematically to help the leader and coach have a focused discussion around whatever problem they are working on.

This approach is an effective way of dealing with one of the baffling and frustrating aspects of leadership. Ask intelligent, responsible people to outline the steps they should take to solve a problem, and most will come up with a series of steps that make sense. Being able to describe a good process, though, is very different from following one. A coach can help a leader use disciplined thinking in the moment, as a problem is being addressed. The coach is a leader of leaders: and the primary way of influencing others is to teach.

What lessons can you draw from Toyota's approach to leadership and coaching? To what extent do you lead by teaching? To what extent can you set up a culture in your school or centre where making improvements and coaching others are treated as routine? What competencies can you look for when appointing leaders that will support such a culture? Addressing such questions can help you build a workplace culture designed to counter Murphy's Law.



## BOOK REVIEW By Phil Ramsey

# Toyota Kata

By Mike Rother

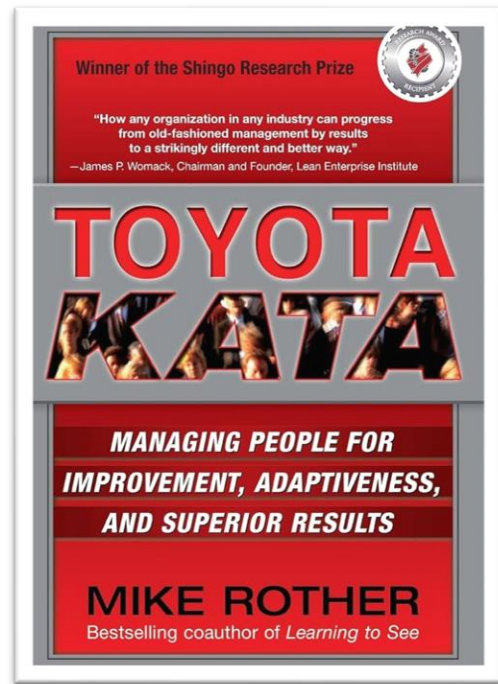
As a student at university, studying management training, I was taught that if an idea was going to be useful it needed to be relevant, teachable, and transferable. In other words, management concepts needed to (1) relate to the decisions that managers and leaders actually make; (2) involve practices that can be taught and learned; and (3) be able to survive the transition from classroom or book—or wherever it is being taught—to the workplace. That formula has been enormously useful over the years. It also highlights both the value of Mike Rother's work with Toyota, and why it might be challenging for readers who aren't familiar with manufacturing.

It seemed to me that the primary audience for *Toyota Kata* are leaders in manufacturing companies who wonder why some of the techniques adopted from Toyota (e.g. kanban and Takt time) don't work as well for them. Rother shows them that while the techniques themselves are 'best practices' in their industry, Toyota makes them work with constant improvement. For people from manufacturing, Toyota's improvement *kata* are directly relevant to what they do, and Rother shows how they are teachable and transferable.

Rother uses examples directly from manufacturing, which no doubt work well for his primary audience. For those of us in education, it means we have work to do as we read. Problem-solving for improvement is certainly relevant to leaders in schools and centres. The use of manufacturing language means some translation is needed before we can learn it for ourselves or teach it to others. Still, the principles Rother explains are practical and useful: leaders need to take a scientific approach; everyone needs coaching; establish teachable routines and make sure they get practiced.

The basic structure of the Toyota approach, because it follows a scientific method, will feel familiar. Establishing the gap between your ideal situation and the current reality is fundamental to management and organisational change. *Toyota Kata* adds some insightful detail about how this gap can be shaped and why it is important not to look too far ahead. The scenario exercise in the book that illustrates the Toyota coaching process is also enlightening.

I enjoyed *Toyota Kata* and I know it is going to inform my approach to change, improvement, and coaching. As you may sense, it isn't light reading and won't provide easy answers to the leadership challenges you encounter. But if you want to build an organisation, like Toyota, that succeeds through constant improvement this can give you an excellent way forward.



'In the Moment' Newsletter – February 2024

# Creating a High-Performing Team

By Phil Ramsey

One of the challenges you face as an educational leader is to create a great place to work. The need to think about how people feel about coming to work was highlighted following the COVID pandemic. In what was termed the “Great Resignation”, following the pandemic people around the world reevaluated their work, their work-life balance, whether they were really satisfied with their job, and whether their current employer was the one who could deliver what they wanted. Millions voted with their feet by changing jobs.

No doubt you saw the affects in your school or Centre. While the situation has calmed somewhat, experts suggest that leaders still need to be concerned. Some estimate that by 2030 there will be a “talent shortage” of 85 million people worldwide, with employers competing with one another to attract the workers they need.

A key to success is making sure that people are engaged and satisfied with their work. Some people, of course, are going to make choices based on pay, location, or other factors over which you have no control. As a leader, though, you want to do what you can to provide a workplace where people can flourish. According to leadership expert Manfred Kets de Vries, providing the opportunity to work within a high performing team enables people to experience a sense of belonging, derive meaning and enjoyment from work, have pride in what they do, and enjoy working alongside others that they trust.



## The Teamwork Puzzle

Complex and dynamic work is often best handled by a team. We need a diverse range of perspectives and skills to find workable options and think through possibilities. We usually need a variety of skills to put ideas into action. With a team comes strength in numbers, capability we don't have when we act independently.

It takes work, though, to create a high performing team. Think of the forces at play within a group of people working together to deal with some difficult problem. The word “team” originates from the term used for animals working together, such as horses pulling a chariot or bulls pulling a plough. Teamwork phrases like “all pulling together” echo this original use. Of course, getting humans to work together involves a different form of leadership than that used by the driver of a chariot or plough.

One of the most important complexities teams deal with is creating a psychologically safe environment that works for the whole team. Psychological safety refers to the sense people have that they can contribute relevant thoughts and feelings, a team climate that is free of interpersonal fear. According to Kets de Vries this is a complex issue because people vary in what we view as normal, and what causes us anxiety or fear. And, surprisingly, we can be helped to understand our differences by thinking about hedgehogs.

Imagine a group of hedgehogs on a cold winter's night. They have gotten together because of a 'strength in numbers' issue: they will be warmer if they huddle together. While they realize that huddling is important, they are hedgehogs, and their spines make it dangerous to get too close. Can you picture a group of hedgehogs coming together, moving apart, jostling one another until they find just the right distance: one that is warm enough without being too prickly? That is a useful metaphor for what teams need to do when they negotiate just how much intimacy is needed for everyone to feel psychologically safe.

## **Managing the Hedgehog Dilemma**

The need for affiliation - working in groups - is a fundamental principle that has shaped all human existence. To varying degrees, all of us feel a natural desire to form attachments to others. But how much attachment is the right amount?

Everyone is shaped by personality and past experiences - both nature and nurture - in different ways. And because we only have our own experience to go on, what we feel seems normal to us. Teammate A might have a strong desire to form close attachments, even if they do get prickly. Teammate B might prefer more distance, even though it means more exposure to the cold. A could be perplexed that B is so stand-offish, while B is bewildered that A is so concerned about their relationship. Meanwhile, other teammates sense that something is not quite right but don't know what to do.

Every team faces the Hedgehog dilemma, so dynamics like this are commonplace. Managing the dilemma generally involves making sure that people understand that it is a dilemma. People need both attachment and independence, even though these seem to be opposites. Discussing the dilemma openly and understanding that people's needs vary is important to making sure that everyone feels psychologically safe. The right degree of attachment will also change over time.

It will be good for your team to have a conversation about the Hedgehog dilemma, and what is involved in finding the right degree of distance and attachment. Ahead of time, think about your own need for affiliation and attachment. How strong is it compared to others you know? Consider, too, the context in which the team operates. How large is the team? How long have people worked together?

Aim to have a conversation where teammates can share what they are comfortable with, and perhaps some of the factors that have shaped what it takes for them to feel safe to contribute. Often, dysfunctional patterns of interaction occur when people lack awareness of what is shaping behaviour.

Helping people appreciate the Hedgehog dilemma does not make bad behaviour and irrational reactions impossible for those in the team. It does, however, give people some freedom to decide what they will do. When people choose to act in ways strengthen team relationships and performance, they generate feelings of belonging and engagement. This is a key to creating a great place for people to work.

# Creating a Coaching Culture

By Phil Ramsey

Everyone needs a coach. While being part of a high performing team provides 'strength in numbers', each team member still needs to make a personal contribution. And individuals are affected by the confusion and complexity of the challenges they face. They need to be able to think through issues in a clear-headed way.

Further, each member of a team comes with their own 'hedgehog' preferences and may need help to navigate how the dilemma affects them personally. Creating psychological safety may mean being able to talk through reasons why they feel the way they do about relationships with others in the team.



Sometimes educational leaders might look for coaching from outside the school or centre. Another option is for teammates to form coaching relationships with one another. This can strengthen both the relationships between teammates and give them insight into each other's areas of responsibility. If you want to provide coaching assistance to a colleague, what can help you develop the mindset and skillset needed to really help?

A key coaching skill is asking questions that help your colleague. A tried-and-true guide to the right question is the GROW acronym (Goal, Reality, Options, What next). Start by (1) asking your colleague about their Goal: what are you trying to achieve? What will success look like?

Then (2) ask about the Reality now: where are they starting from in relation to their goal? The gap between goals and current reality provides a clear direction. Then it's time to (3) ask about their options for closing the gap. Help your colleague brainstorm actions that could help. Finally, (4) ask them what they will do next. Preferably, get them to state an action and a timeframe, then follow up to check they have done what they intended.

In its purest form, coaching can be done without the coach making any judgements or giving any opinions. A coach can seek to just be a sounding board. However, research by leadership experts Jack Zenger and Joseph Folkman has highlighted leaders ranked as the best listeners do more than simply act like non-judgmental sponges. The best listeners view themselves more like trampolines: people who add energy to conversations, enabling others to bounce higher and think expansively. Take time to reflect on your own strengths and consider how you might add a perspective that gives a colleague you are coaching extra insight or confidence.

Finally, Kets de Vries provides another key element to a coaching mindset. In our own minds, our thinking seems rational and completely reasonable. When we voice what we think - for instance, when we are being coached - the flaws in our thinking become obvious, even embarrassing. People might realize that they have been damaged by experiences of the past and this affects the decisions they make now. An effective coach realizes that everyone - including themselves - is damaged and irrational in some way. Coaching provides opportunity to provide reassurance to colleagues that they don't have to be superhuman; what might be called a "welcome to the human race" moment, where your colleague learns that everyone has some kind of battle with themselves.

What is the lesson here? If you want high performing teams, people need coaching. Perhaps you can contribute to a coaching culture in your school or centre.

## BOOK REVIEW By Phil Ramsey

# The Hedgehog Effect

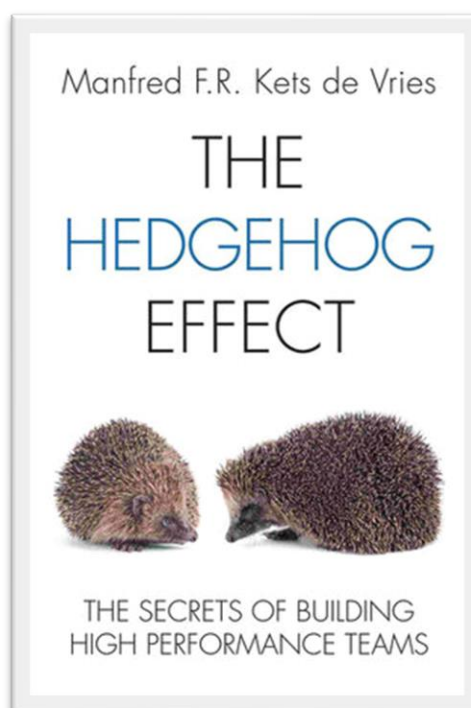
By Manfred F.R. Kets de Vries

**Manfred Kets de Vries is recognized as one of the world's leading thinkers when it comes to leadership theory. Alongside being a prolific writer, he has established leadership programs at some of the world's leading universities.**

In keeping with his ideas about leadership, these programs often feature personalized coaching for the participants. His work on leadership involves a unique blend of business knowledge, change management and psychoanalysis.

In *The Hedgehog Effect*, Kets de Vries aims to address a real bottleneck in leadership development and organizational change. As discussed earlier in this newsletter, everyone needs coaching. But there aren't enough expert coaches to go around. One way forward is for coaches to work with teams rather than individuals. The book outlines tools and processes that can be used to help groups become high performing teams. Kets de Vries draws on his coaching experience, techniques of psychotherapy and stories from Zen Buddhism to help readers understand what is involved in navigating the Hedgehog dilemma.

I found the book somewhat perplexing. It was clearly packed with valuable ideas that I might be able to use when coaching leaders. But how to use them? The explanation of the Hedgehog dilemma is one that most teams will be able to understand. Psychotherapy techniques, while they may be interesting to read about, are not so readily translated into practice, either for a leadership coach or for a leadership team. It felt like this was a book for academics and consultants, rather than for practitioners. It may inform how aspiring coaches go about their work, though probably will make most sense once a coach has already has some significant experience and practical skills.



*'In the Moment' Newsletter – May 2024*

# Making Work Memorable

By Phil Ramsey

We are halfway through the school year. When you look back over the last two terms, what do you remember? Will it stand out as a significant time in your life? Will it strengthen your connection to your school or centre? And what about others in the school: your students and colleagues? How will they feel looking back over this time?



How people remember their experiences is important to leaders in education. If, when looking back, people recall the time as disappointing, mundane or painful, why would they want to stay? Why would they recommend the school or centre to others, or speak well of it when talking to others on staff? What if we didn't have to leave this to chance: what if we could do something to help shape what people remembered and how they felt about their work, their colleagues and the school or centre itself?

Authors Chip and Dan Heath explore this issue in their book *The Power of Moments* (see book review in this issue). Their work has some fascinating implications for leaders and highlights why organizational life tends to be unmemorable.

## Not All Moments are the Same

Imagine that you gave a rating out of 10 to all the moments that happened at work in the first half of the year. There were some highs (9 out of 10 because they were so enjoyable and impactful) and some lows (2 out of 10 and you just want to forget what happened), and on average things were OK (5 out of 10). How would this sit in your memory? Would you feel kind of average?

While that might seem logical, it's not how memory works. Most of life is fairly mundane. Most things we experience we have seen before, so most moments are quite forgettable. What we tend to remember are (1) peak experiences, and (2) what happens during transitions, where we finish one thing and move on to the next.

Think about the implications. If you want people to be more excited about and engaged in their work, should you try to lift every moment, making it a little more interesting, so the average goes up from 5 to 6? No. Not only is that impossible for a leader to manage, but doing so would mean the same number of forgettable moments. What would make a difference would be to make sure that there were some amazing peak experiences, and that more work was put into ensuring transitions are experienced as in a way that has an impact. And here is a golden opportunity to make a difference in people's lives: if, based on past experience, they expect an event to be awful (a 1 or a 2) and you can turn it into something awesome (an 8 or 9), the impact will be tremendous.

## Designing Moments

What can you do? What will make a moment memorable? The Heath brothers outline four elements of the moments that have a lasting impact on how we feel. They are elevation, insight, pride and connection. Elevation is the feeling that something is outside of the ordinary, different

from the routine of life because there is more drama. Insight is where a moment leaves us with an enhanced understanding of something we know will be important in the future: a penny dropping that allows us to see the world in a new way. Pride occurs in moments where we get to observe ourselves at our best, perhaps showing courage where at times we might have shrunk away from a situation. And connection occurs in moments that enable us to deepen ties with others, such as times when we share an experience of struggling together to achieve a shared goal.

This is an important list for leaders. By getting familiar with these elements of memorability, you can recognize opportunities you might otherwise overlook. What routine—perhaps even unpleasant—activities do people have to undertake? What might you do to make these occasions a time where they can form deeper connections with others? Most leaders understand that acknowledging effort and achievements can make a lasting impact, yet most of us will miss opportunities to say something meaningful that might give the recipient a deserved sense of pride.

Sadly, the pressures of organizational life often hold us back from doing things that would make work more memorable. When we are thinking of giving some much-deserved praise, the need to get some other urgent project completed means we put it off. Rather than celebrate a significant milestone in a project (an important transition) we might convince ourselves to leave celebrations until the next milestone, or maybe the one after that. We might put in the effort to make some event a peak experience for everyone (a 9 out of 10), then be talked into delivering an OK experience (4 out of 10) to save some effort and money.

Aiming for peak experiences may sound like it is demanding too much of a busy leader. Keep in mind, though, that it is all about leverage. Not everything has to be a peak experience. With some effort in the right place, you can transform how work in your school and centre are remembered.

# Flipping the Performance Review Script

By Phil Ramsey

We've found that performance reviews are a grand opportunity to create a memorable moment. In theory, performance reviews should be peak experiences. They are an opportunity to talk about achievements (contributing to pride) while learning lessons from important experiences (insight), while simultaneously building a meaningful relationship (connection). Yet organizations in every industry find that they don't deliver. Most people have a sense of dread when a performance review is approaching. And the leader doing the review has so many to get through that it usually feels like a 'tick box' exercise rather than a conversation of significance.



Because of the significant investment of time and effort involved, major corporations around the world are rethinking Performance Reviews. For many the annual cycle now seems arbitrary and doesn't align with the pace of change they are experiencing. It also prompts leaders to put off providing much needed feedback until it is time for the review. Companies are experimenting with new approaches, looking for ways to break out of what has become an ineffective routine.

What about Performance Review at your school or centre? Think about what you want a serious conversation about performance to deliver. If you had a process that created memorable moments, what would it look like? Changing from a dull ritualistic approach that everyone expects to something completely different is what Chip and Dan Heath call "flipping the script". Changing away from the expected is often enough to make a moment memorable. Of course, if the new approach becomes a routine ritual, you wouldn't expect it to remain an elevated experience!

An approach that some schools have used very successfully is what we have called "Appreciative Appraisal" (while the term 'appraisal' feels quite dated, we enjoyed the alliteration). With the help of InterLEAD, a variety of people are interviewed and asked about the particular strengths of those being appraised. Reports are then prepared that only include positive comments made, grouped into key themes that emerged about the strengths of each person. People have their personal reports read to them.

In our experience, everyone finds it a dramatic and emotional time, when they are confronted with overwhelmingly positive comments about them, made by their colleagues. It is a completely different 'script' to a standard Performance Review (hence, an elevated experience). Further the process gives insight into personal strengths in a way that engenders personal pride, while building stronger connections with the colleagues who have made the comments.

Perhaps you can find similar ways to transform Performance Management into something much more memorable for people in your school or centre. The effort is worth it!

## BOOK REVIEW:

# The Power of Moments

By Phil Ramsey

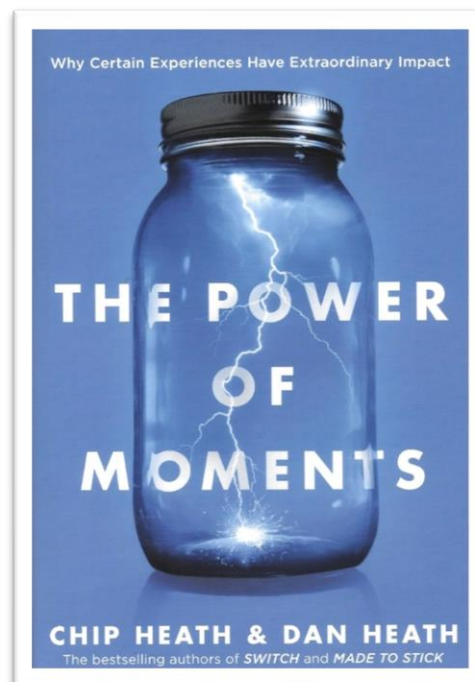
**Chip and Dan Heath are brothers who are both very successful academics, working in management studies at US universities. They have written several books together and in a previous issue of In the Moment we reviewed Dan Heath's book Upstream.**

I'm now determined to read more of their work. They write in a very engaging way: providing a very clear framework for organizing ideas and giving pointers around good practice. Further, they do a great job of establishing a sound, evidence-based foundation for what they write. They clearly research their topics well and add colour with carefully selected examples that illustrate points.

In the case of *The Power of Moments* it was difficult to decide what to feature in this newsletter. The book is filled with examples of people who have designed experiences so that they have extraordinary impact on others. The examples are often described in a way that highlights that, while there may be some degree of creativity in the design, most of us could do something similar if we put in the effort.

Peak experiences are all around us and we have all had moments that stick in our memories. So, what the Heath brothers write is easy to accept. It resonates with what we might have personally observed. Because it is compelling, I was left feeling proud of past efforts I had made to elevate the experience of learners, and now that I'd learned some of the key ingredients of memorable moments, determined to keep looking for opportunities to apply the Heath brothers' framework.

This is an excellent book that I thoroughly recommend, both for teachers and for educational leaders.



*'In the Moment' Newsletter – August 2024*

# Managing Knowledge

By Phil Ramsey

For over a quarter of a century we have lived in what management experts have termed 'the Knowledge Era'. Management expert Tom Peters put it this way: "Brains are in; heavy lifting is out." Organisations of all sorts depend on how they develop and manage knowledge. Most people working in education have spent their whole professional lives in the Knowledge Era.



But that makes it frustrating when you ask someone a question, and it seems that when they answer they are pushing 'Play' on a recording of the opinion they have held for years; an opinion that has been undisturbed by new learning and experiences. A changing world means people need to find ways to respond to new challenges that arise. More than that, when we find an approach that works, we need to be able to remember it, adapt it, and share it with others.

While this might sound straight forward, it does not happen automatically. Leadership is needed to create a work environment where people are adept in managing knowledge. In this issue of *In the Moment*, we'll explore what some professions have done and are doing. Notably Atul Gawande, Harvard Medical School surgeon and author of *The Checklist Manifesto* (see the Book Review in this issue), has been crusading for better knowledge management in medicine.

## The Beauty of Checklists

A paradox for leaders is that people don't do what they know to be right. If you ask a group of smart people to list the steps in making a good decision, most will come up with something reasonable: a step-by-step process a lot like what you would find in management textbooks. The problem is that when making decisions, they don't follow any kind of process at all.

In *The Checklist Manifesto* Gawande points out that this is a serious problem affecting surgical procedures around the world. Many complications suffered by patients are the result of doctors and nurses overlooking basic, well-established steps. Dramatic improvements are made when surgical teams follow a checklist, even if it is one that they have developed for themselves. They often have the knowledge they need to be successful; they just need to be systematic about using it every time.

Then there is the issue of complexity. With massive investments in research worldwide, new knowledge is being produced at a rate that is impossible for individuals to keep up with. There are new medicines, new technologies, new procedures - most of which make prior knowledge redundant. Again, systematic use of checklists provides a simple way forward.

According to Gawande, all professional groups do well to imitate the way the Aviation industry uses checklists. Aircraft are so complex that it is impossible for aircrew to operate them from memory. Airlines ensure that every aircraft is equipped with a manual of procedures, both for regular checks and for anything that might go wrong. When new problems are identified, companies like Boeing and Airbus respond by developing procedures to counter them and to pass these on to airlines. All aircrew, no matter how experienced, understand that using checklists is not optional; it is an essential aspect of professionalism.

## Successive Approximation

Let's say you wanted to take a more systematic approach to key processes in your school or centre. What does it take to develop a good checklist? A useful approach is 'successive approximation', a technique that originated in mathematics and which has been adapted to work in many fields, including education. Sometimes a problem is too complex to expect a perfect solution, at least at first. Instead, quickly develop something that incorporates what you know, try it out, then refine it. Keep refining it to build more and more knowledge into your solution.

Your first attempt at a checklist will always need improvement. You will have missed out important steps, provided too much detail in some places, or find that by the time you use it the situation has changed in some way. Don't let that stop you from using it. Using a checklist - even one that isn't perfect - will likely be better than not having one at all.

Keep the language clear and unambiguous. Find out how easy it is to understand. Aim for the right level of detail for the people who will be using it. New people may at first need steps broken into smaller chunks. Pay attention to the pattern of errors people make. If no one ever forgets a particular step, you may not need to include it in the checklist. People will be more likely to use checklists if they are kept as simple as possible. When new errors appear, investigate and work out how the checklist can be adjusted.

In many situations, people may need to be reminded to communicate with others. Forgetting to communicate can undermine teamwork. A good checklist might include steps that remind people when they need to introduce themselves, consult with others or explain what happens next.

In a diverse range of professions, from aviation to finance, professionals have found that the apparently simple technique of using checklists enable people to work together systematically with better teamwork. Why not talk with other leaders in your school or centre about where a checklist might make a difference to how you get things done.

# The Wrong Stuff

By Phil Ramsey

Commercial aviation expanded rapidly after World War 2 with the development of passenger aircraft like the DC-3. It was during this time that the need for checklists became evident; the new planes were too complicated for even the most experienced pilots to rely on memory.



But checklists were not adopted in every field of aviation. Test pilots for jet aircraft had a culture of heroic individualism, captured in Tom Wolfe's book *The Right Stuff*. These pilots held on to the idea that a combination of courage, improvisation, fearlessness and brilliance was what it took to succeed. However, during the 1950s around 1 in 4 test pilots were killed in accidents. There was a high price to pay for relying on individual qualities rather than systematic processes. What test pilots thought of as the 'right stuff' for their profession, is now treated as the 'wrong stuff' by the airline industry, which requires pilots to be systematic team-players who communicate well and solve problems collectively.

While aviation has made that culture change, Atul Gawande describes the challenge of changing the culture of medicine, where many involved in the World Health Organisation (WHO) study resisted the idea of making checklists a routine part of their work. In follow-up surveys, around 20% of participants in the study felt the checklist was difficult to use, too long, or didn't think it improved the standard of care. At the same time, 93% of those surveyed said that if they personally were having an operation, they would want the checklist to be used. According to Gawande, developing an effective checklist was a step in the right direction. Much more work was needed to get it accepted and used.

You might experience the same challenge in education. You may have to deal with people who are convinced that as experienced professionals they don't need to rely on a standardised procedure. Or they may think that the work they do is too complex to be systematised in this way. What can you, as an educational leader, do to encourage adoption of checklists?

The experience of the WHO team provides some important lessons, touched on in *The Checklist Manifesto*. The WHO has published the Safe Surgery Checklist on its website. But it has done more than that. Along with the checklist, they also provide an implementation manual which explains to hospital leaders what they can do to encourage its use. They advise against trying to force the issue. Rather, they say that successful implementation requires early engagement with staff, with extensive discussion, education and training. Experienced and respected leaders need to champion the effort, and people need ongoing feedback that spells out the results that are being achieved. Further, rather than thinking that the checklist is set in stone, local adaptation is encouraged so that the checklist uses language that resonates with the people who use it.

WHO realise that a checklist doesn't replace leadership. It is a tool that leaders can use to improve the effectiveness of their work. Keep this in mind with your own experiments with checklists. Identify an issue that is important to you. Engage others in the work of developing a checklist. And make sure that staff engagement stays a leadership priority throughout its implementation. Your leadership efforts can help people build a true picture of 'the right stuff' needed by professional educators.

## BOOK REVIEW:

# The Checklist Manifesto: How to Get Things Right

By Phil Ramsey

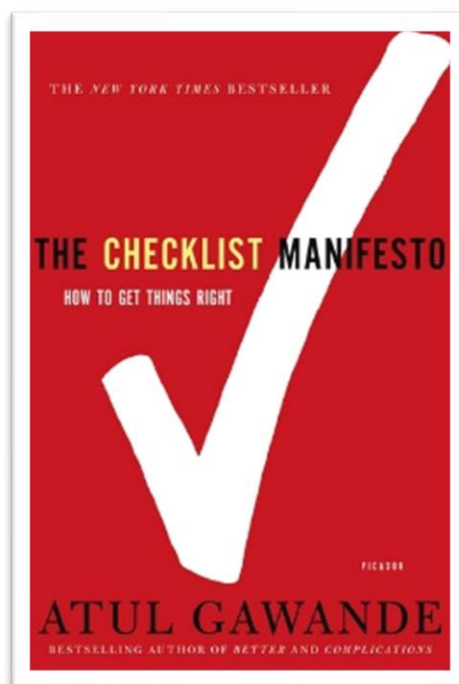
**In 2006 the WHO approached Atul Gawande to take part in an international project. They wanted to develop a “safe surgery checklist” that could be used for all types of surgery in hospitals all over the world.**

WHO initiated the project because, at the time, around 230 million major operations were performed annually around the world, and it was estimated that around 10% resulted in some kind of complication. It took two years to develop a 19-item checklist that could be completed in under 2 minutes. When used, WHO has found that complications and mortality resulting from surgery are reduced by 30%. Given the scale of the issue, this reduction is incredible.

In his book *The Checklist Manifesto* Atul Gawande goes into detail about how he learned the value of checklists. He explains how he has explored their use by hospitals, agencies working in disaster response, airlines, and by engineers involved in the hugely complex work of building skyscrapers. And, of course, he tells the story of the WHO project. With every example Gawande builds a case for taking a systematic approach to complexity that recognizes how easy it is to overlook essential knowledge if we just rely on memory.

A checklist might seem like a simplistic solution to complex problems. You might think that the work you do is far too complicated to be described with a step-by-step procedure. Gawande’s book does a fantastic job of explaining how they work and many of the critical lessons he has learned as he has developed, used and refined them in his work.

The book is extremely readable, filled with great stories that illustrate the value of taking a systematic approach to professionalism in any field. While he doesn’t deal directly with education, I was left convinced that I need to make more use of checklists in my work. I’m sure you’ll enjoy *The Checklist Manifesto*, and I also recommend his earlier books, *Complications* and *Better*.



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