TEAM BUILDING

The Checklist Manifesto: How to Get Things Right


If you are at least 52 years old and have been paying attention to what is happening around you, you will recognize an enormous amount of good sense in this brief 209-page book. If you are 35 (±5 years), your response will likely be “I thought so. This will take a lot of energy but it just might work.” If you are 25 and just starting out in loss control, your response is likely to be, “Oh man! Here is the silver bullet for all my problems!”

Well, of course that isn’t true. It will take a couple of years to discover that something as simple as a checklist can be so attractive in the abstract and so damnably hard to generate for practical use.

There is the rub: practical. Consider the checklists that are standard issue to airline pilots. Some are for routine activities (such as backing away from the gate). Pilots have plenty of time to touch those points since the plane is not even in motion. Then, there is the checklist for when a cargo door on a 747 fails. At 30,000 ft, time is an issue as are several other things that were unimportant at the gate. The checklist had better be practical.

In preparing the checklist for surgery around the world, which is the core of the book, Gawande had to sniff out all kinds of details, from many different people around the world with various skills, and work with myriad committees. Because of his learning process and the learning process at eight hospitals when the checklist was used, he knew he was not finished. Like flowers, checklists must be tended. A practical checklist is a work in progress. Stories or statistics? Except in some specialized situations, stories win hands down over statistics as a means for making a point with people. Narrative is Gawande’s chosen device and he makes the most of it. The title of the book is The Checklist Manifesto, and Gawande never loses sight of the objective of developing a surgery checklist for operating rooms around the world. However, he weaves multiple examples that represent different points of view into the narrative to make his points. From the art world, this would be similar to Monet’s four paintings of the same door at Rouen Cathedral.

One example is the use of flight checklists. He starts at the beginning with the crash of what became the B-17. The test plane was superior in almost all respects. It crashed on its first flight and killed an experienced test pilot. The investigators concluded that “this new plane was too complicated to be left to the memory” (emphasis added) of any one person, however expert.

The investigators recognized that training was not an issue (now there is a surprise). This was the start of flight checklists to help flight crews. This brings us to the crash landing of a commercial flight in the Hudson River and the captain’s insistence that success was a team effort supported with checklists.

For a different view of the cathedral door, consider an upscale restaurant kitchen. You guessed it: The recipes are posted and the owner/chef reiterates repeatedly and energetically, “Follow the recipes.” Quality control is maintained first with a standard and second by follow-up. Good food out of a busy kitchen is the result of a team effort and checklists.

The surgery checklist includes a team-building quotient. Professional musicians who have never worked together can come together and with a remarkable minimum of rehearsal deliver performances that please audiences and critics. Gawande describes doing surgery with an assistant with whom he had never worked. Highly trained and experienced professionals can do that.

But the surgery checklist includes a small tool, trick, artifice or device to set up and integrate the team. The method? Everyone on the operating team must introduce him/herself and identify his/her function. With the early implementation of the experimental checklist in eight hospitals around the world, this technique was able to percolate through cultural barriers. In cultures where women are second-class citizens, female nurses who could never be such bold actors on any other stage were able to precipitate corrections in operating theaters.

This is an exceptional book. After a fashion, it tells us that success was a team effort supported with checklists.

More on The Checklist Manifesto

In a January 2010 posting to the Freakonomics blog hosted by the New York Times, economist Steven D. Levitt, coauthor of the best-selling Freakonomics, notes his disdain for checklists along with his equal amazement that Gawande’s Checklist Manifesto has altered that view.

“I read Atul Gawande’s new book about checklists in one sitting . . . which is an amazing tribute to the book that Gawande has crafted. Not only is the book loaded with fascinating stories, but it honestly changed the way I think about the world. It is the best book I’ve read in ages.”

He adds, “The book’s main point is simple: no matter how expert you may be, well-designed checklists can improve outcomes . . . . The best-known use of checklists is by airplane pilots. Among the many interesting stories in the book is how this dedication to checklists arose among pilots. Even more interesting are the stories about Wal-Mart’s response to Hurricane Katrina, and the real reason why David Lee Roth used to demand that there be a bowl of M&M’s with all the brown ones removed in his dressing room backstage.” Read the complete post at http://freakonomicsblogs.nytimes.com/2010/01/04/the-checklist-manifesto.

In February 2010, PBS Newshour aired a report showing the checklist in action in a surgical setting. According to the report, the checklist approach highlighted in the book grew out of Gawande’s work for World Health Organization, which asked him to help find a way to reduce deaths in surgery. View the report at www.asse.org/professionalsafety/columns.php

“Writing Worth Reading” is written by Carl Metzgar, CSP, ARM. The column examines literature that today’s SH&E professionals should be aware of as they seek to expand their knowledge and enhance their effectiveness. Metzgar is a writer and consultant based in Winston-Salem, NC; he can be reached at (336) 766-8264 or cmetz 46840@aol.com.