

Notes: Checklist Manifesto

Argument: Checklists can help us manage the volume and complexity of knowledge in our professional and personal lives.

Quotes

Under conditions of true complexity -- where the knowledge required exceeds that of any individual and unpredictability reigns -- efforts to dictate every step from the center will fail. People need room to act and adapt. Yet they cannot succeed as isolated individuals, either -- that is anarchy. Instead, they require a seemingly contradictory mix of freedom and expectation -- expectation to coordinate, for example, and also to measure progress toward common goals.

... People in the skyscraper industry had made the reliable management of complexity a routine.

That routine requires balancing a number of virtues: freedom and discipline, craft and protocol, specialized ability and group collaboration. And for checklists to help achieve that balance, they have to take two almost opposing forms. They supply a set of checks to ensure the stupid but critical stuff is not overlooked, and they supply another set of checks to ensure people talk and coordinate and accept responsibility while nonetheless being left the power to manage the nuances and unpredictabilities the best they know how.

... Under conditions of complexity, not only are checklists a help, they are required for success.

p. 79

Checklist types:

- Recipe-style: tasks to complete
- Communications: things to talk about; questions to ask

Reference to soap study in Karachi. Simple act lowered death rate.

Checklist as the "soap" for surgical care:

- simple
- cheap
- effective
- transmissible

Checklists should include a communications component. E.g.: intros with names.

Just ticking boxes is not the ultimate goal. Embracing a culture of teamwork and discipline is.

Result for surgeons, financial planners, and others who've implemented checklists:
"They improve their outcomes with no increase in skill."

Resistance: Making a checklist runs counter to deeply held beliefs about how the truly great handle situations of high stakes and complexity.

But: The checklist gets the dumb stuff out of the way, the routines your brain shouldn't have to occupy itself with and lets it rise above to focus on the hard stuff.

Professionalism: All learned occupations have a definition of professionalism. They have 3 elements in common:

- An expectation of selflessness. We who accept responsibility for others will place their needs above our own.
- An expectation of skill. We aim for excellence in our knowledge and expertise.
- An expectation of trustworthiness. We will be responsible in our personal behavior.

Aviators add a fourth expectation: discipline. Discipline in following procedure and functioning with others.