



For Managers, Principals, Team Leaders and Internal Consultants
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Issue No 20: It's simple and it works

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It's simple and it works

In a previous edition of *be your best* report ([click for copy](#)) I wrote about Dr Keith Cleland, a pioneer in simplifying and improving business performance. Keith was also a strong advocate for using Action Sheets as a tool to initiate change. I have to admit to being a convert and constantly using them in my coaching work. Quite simply, an action sheet is a written document, (sometimes even the back of the envelope will suffice), that records agreed to actions, as well as establishing who will do it and by when. ([sample action sheet](#))

Why an action sheet is so powerful

1. An Action Sheet focuses attention on what needs to be done.

There is plenty of current evidence to suggest that people who write down goals and actions have greater success in achieving their goals. The action of 'writing something down' commits something to your brain (and therefore gives you both conscious and unconscious reminders that it's where your energy needs to be focused), and it also puts it right there in front of you – a visible reminder. Without that focus and commitment, we can easily excuse ourselves for doing 'what pops up' as the day goes along. As Stephen Covey says, we often focus on what is urgent, (e.g. answering the phone as it rings and responding to emails when they arrive), rather than those things which are truly important to build and grow your business.

Implementation Tips

While the Action Sheet itself will not magically 'make time', it gives you focus. In order to create time for the important tasks a great tool I increasingly see my clients adopting are default diaries. A default diary is where you block out time in your diary for each of your roles, actions and

commitments. (See previous report on [“How you can achieve more each day”](#)). Ensure you reserve blocks of time for unexpected tasks that come up too. Also have a set timeframe in which to complete tasks. This will help you to be more productive and focused.

2. An Action Sheet can be used to break down worthwhile goals into manageable steps.

Implementation Tips

Ever heard the saying, ‘How do you eat an elephant?’ The answer, of course is one bite at a time. It’s the same with the goals you have set for your organisation, for your own development and the learning and development of your staff.

Let’s say your goal is to build a post assignment checklist to ensure that the right follow up has happened, and that staff have learnt from the assignment. This can seem like a big goal and a way to reduce this overwhelming task is to choose and write out 4-6 actions you can take that will assist in completing it. Once you have completed each step, tick it off and acknowledge your accomplishment – this will give you a fillip and motivate you further toward achieving your goal. Too often we don’t acknowledge and celebrate our successes because we think they are too small to be called a success. Maybe our ‘bar for success’ is too high.

3. An Action Sheet is a very useful tool to advance the learning and development of your team members.

It builds accountability within a team and is an opportunity for people development (yours and your team members). By spreading the agreed-to actions amongst your team members accomplishes three things:

- It gives others the opportunities to take on tasks that will leverage the managers time,
- It provides learning and development opportunities, and
- It will invariably lead to better outcomes.

I have observed many times how managers who have previously been reluctant to hand over responsibility, do so only to be surprised and delighted by the results. Often managers hold onto tasks because they’ve done them many times before and are comfortable doing them – how often do you hear, ‘but it’s faster if I do it myself’. What this does, though, is denies team members the opportunity to develop and grow, but also denies you, as the manager the opportunity to develop as you are operating within your comfort zone rather than pushing yourself to the next level as a leader. Leadership means spending time with your team and clients (even if internal) causing things to happen rather than doing it yourself. It’s then a win for everyone.

Implementation Tips

Indeed sometimes the timing may not be right to implement something new and coming back to it in the future will occasion a great deal more

interest to take on the action. On the other hand, be mindful that you are putting it aside for the right reasons and not just to escape the real work of a manager which is giving your people the time, patience and the information they need to make things happen.

I have just finished working on a systems development project with a company that took about 8 months of monthly (sometimes more frequent) meetings. We spent the first meeting getting clear on the purpose and agreeing on the process we would follow. As team members could see the progress being made each month, they became more interested and motivated. When it was time to launch the new system, each project team member presented on a part of the proposed new systems – and because they had been involved in the creation of it they spoke with much passion and conviction. Their passion and conviction inspired the confidence of other staff who were more willing to back something that had been well endorsed by their colleagues than they would be something that was ‘enforced’ upon them from ‘upon high’.

If it’s urgent and important you may need to flex your manager muscle, however, it’s better to spend the time and energy getting people on board than it is in either bludgeoning people to complete the task or, worse, continually having to do it all yourself.

4. An Action Sheet helps implement change.

While the action sheet is an excellent tool to bring focus and commitment, it should also be seen as part of the change process. I watch, (and ask my clients to do so too), how the tasks on the action sheets are completed (or not completed) to give meaningful feedback on how their organisation deals with agreed to actions. What strengths does it show in the organisation and what challenges are there in implementing change? I see an Action Sheet as a very powerful coaching tool and assists in the process of driving forward the change that is needed.

Implementation Tips

Let me be clear, I don’t pull the action sheet out at the start of every coaching session like a big stick. I am just aware of what is on the action sheet and will bring attention to it if it’s important for the development of my client and their business. I explore with the client why actions aren’t being taken, (e.g. resistance, procrastination, lack of skills or clarity, prioritisation), and then help the client look for options. I have observed that building this accountability for leaders often allows them to ask and coach their team members to be more accountable. This always leads to better performance from everyone.

Action Sheets and Motivation

Finally, motivation is not something you get by waiting around or going to a motivational talk. That’s inspiration – which is great as a spark and a starting point, but you still need the perspiration to make something happen. NIKE the sports company brilliantly tapped into the human condition when they coined the now famous “just do it”. Motivation comes from within and usually

results from stepping forward and taking some action. Action sheets are a simple tool which can make an enormous difference. There is nothing like a workplace where people are setting and achieving goals individually and as a team. It feels great for the individuals, the organisation radiates success and people want to work with you and be your customers.

"Knowing is not enough; we must apply. Willing is not enough; we must do"

Johann von Goethe

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