All advisors want their meetings to be productive – resulting in deeper relationships and buy-in to your recommendations from clients, open conversations with prospects about their needs and honest discussions about how you can help. An email from an advisor last week pointed to research from commercial pilots and surgeons that can make your meetings a better use of your time.

The email came from an advisor named Phil, responding to last week’s article, Olympic Training Techniques that Win Clients, describing how an advisor applied mental training and visualization techniques that she’d learned as a college athlete. Among the evidence for the power of mental training is research on how medical students who visualize an operation beforehand have a higher success rate as a result.

Here’s an excerpt from Phil’s email:

I was struck by your reference to how surgeons get better outcomes if they go through the operation in their heads beforehand, one step at a time. My sister is a doctor, and five years ago she lent me a copy of a book by a doctor who teaches at the Harvard Medical School. The focus of the book was research showing that surgeons who use detailed checklists make dramatically fewer mistakes and have substantially better outcomes.

I shared the book with my assistant and associate. As a result we began putting together detailed checklists for how we interact with clients, whether face-to-face or on the phone. Since beginning to use checklists, we have found ourselves better prepared for meetings, with no last-minute scrambling because we’ve forgotten something. All the small details that might have gotten missed now happen, and they happen every time. As a result, meetings go more smoothly and we’re all much less stressed – and perhaps because of that we’ve seen a noticeable improvement in the outcomes from our meetings.

How checklists avoid mistakes
The book that changed how Phil runs his practices was *The Checklist Manifesto: How to Get Things Right* by surgeon Atul Gawande. In this *Interview with Newshour*, Gawande described how his team came up with the idea of written checklists after being commissioned by the World Health Organization to reduce deaths from surgery. After written checklists were implemented in eight hospitals around the world, complications dropped by one third and every hospital saw fewer deaths.

An early proponent of checklists was a critical care surgeon at the world renowned Johns Hopkins medical center in Baltimore. In 2001, this surgeon established a simple five-step protocol to reduce the number of infections when intravenous lines were inserted to deliver fluids or medicine directly into patients’ veins. With support from the administration, nurses began checking off each of the five items as surgeons inserted intravenous lines. Within a year, central line infection rates dropped from 11% to zero. As a result, written checklists were implemented for a variety of other procedures and Johns Hopkins saw deaths in the intensive care unit go down, and the average stay drop by half.

Dr. Gawande attributes the need for checklists to one simple reality:

> The complexity of the world has eclipsed our abilities, no matter how well trained we are. We knew we had technology and incredible levels of training, people working unbelievably hard. But we have more than 100,000 deaths just in the United States following surgery. Half are avoidable, from our studies. We have found this idea, this extra tool that others were using in aviation, in skyscraper construction.

The Newshour interview went on to point to studies showing 60% of pneumonias in America get incomplete or inappropriate care, and that it’s the same for 40% of all cases of coronary artery disease. Here’s what Dr. Gawande had to say:

> It’s not because we have bad doctors or bad nurses. We have great people, great drugs. But making all of the steps come together in such a way that nothing falls between the cracks, we’re not great at that.

**Using checklists to make meetings more effective**

Doctors are not alone in feeling overwhelmed by the complexity of everything they have to do, and Phil is not the only advisor who implements written procedures in his practice. I recently talked to an advisor named Sue who worked with her team a few years ago to create an Operations Manual to document the ideal processes in a dozen aspects of her business. Here are some examples:

- What happens when her receptionist unlocks the door in the morning;
- How they run their Monday morning meetings;
- The response when a client calls and Sue is not available;
- What happens when clients call with complaints or problems with their accounts;
• The sequence of activities when a review is booked with a client;
• The specific steps when a first meeting is scheduled with a prospective client; and
• The response when a client provides a referral

Sue echoed Phil’s comment about the reduction in stress around the office.

We were already doing a lot of the right things, but we weren’t doing them all the time or consistently each time. There was always this awful feeling of “what have we forgotten?” By having written steps to refer to, everyone in our office is on the same page and it’s made the learning curve for new hires much faster.

And this was a lifesaver when I had to take off three months a year ago to spend time with my mother in the last stages of her life. We were already at capacity, and my team couldn’t handle more work, so I hired a recently retired advisor to come in three days a week and conduct reviews with some of my smaller clients. Being able to give him a step-by-step guide to exactly how we operate allowed him to step in smoothly and reduced my anxiety level at a time when my stress level was already at its limit.

To improve the efficiency and effectiveness of your meetings, written checklists will help. Click here to read more about the research that led to The Checklist Manifesto.

Dan Richards conducts programs to help advisors gain and retain clients and is an award winning faculty member in the MBA program at the University of Toronto. To see more of his written commentaries, go to www.danrichards.com.