

Documentation Made Easy & Effective: The "Same-Day Summary"

When I practiced labor & employment law, it amazed me how poorly executives and managers documented important matters. Often, no record existed; worse yet, sometimes a summary, which was inaccurate or incomplete, was done well after the event.

In my current consulting and coaching work with employers, I still encounter this problem. Fortunately, however, there is a solution: The Same-Day Summary (SDS).

What is an SDS? It's a written confirmation created and sent shortly after a meeting or discussion. It follows these rules:

1. SDSs are very short, covering only what the writer thinks are the key takeaways.
2. Key takeaways include: (a) commitments made—who will do what by when; (b) critical facts or understandings where divergent memories or interpretations could be problematic; and (c) recognition of positive or constructive recipient behavior.
3. SDSs are written ASAP following a real-time conversation and within one day.
4. The SDS invites the recipient(s) to add anything omitted of importance or to correct any errors.

Why are SDSs easy to write, yet effective? First of all, if they're done while the conversation is fresh in mind, they're usually accurate. Second, if they're limited to what the writer thinks is most important, they take minutes to write. Third, if they're sent promptly and include language such as "Let me know if I missed or misstated anything," they're user-friendly for recipients. Recipients don't need to reply unless they think the writer missed something significant. Fourth, in a non-judgmental, non-authoritarian way, the SDS aligns writer and recipient and provides a baseline by which they can hold themselves and each other accountable.

What are common missteps to avoid?

1. **Wordiness.** List only the most key items discussed and only what was most important about them, such as specific commitments or deadlines. You're not taking minutes and you don't get points for comprehensiveness. If the recipient thinks you missed something, he or she will respond to your invitation to make corrections. Less is more.
2. **Continuing the conversation.** Don't add, embellish, reflect, opine, etc. The conversation is over. You're simply memorializing its critical points. The SDS is a *summary* of a real-time conversation, not a *substitute*.
3. **Delay.** Research by Hermann Ebbinghaus (the "Ebbinghaus Forgetting Curve") shows that we start to forget new information almost within minutes of receiving it. The longer you wait, the greater the likelihood that your SDS will omit or misstate something important and the harder it will be to write the SDS since you'll have to rack your memory regarding what actually was said. If you can't spend a few minutes immediately after the conversation to write the SDS, take notes of key takeaways that you can return to later when composing the SDS.

Email is a handy SDS vehicle. In addition to being quick and efficient, email makes it easy to store SDSs electronically. After I hit “Send,” I click and drag the SDS into its proper folder. This makes subsequent retrieval quick and painless.

It may take a little bit of time and effort to get the hang of SDSs, but it won’t be long before you have that “Aha! Moment,” and start cranking out SDSs as a regular communication practice.

So give the SDS a try. If you run into a snag, let me know. We’ll have a real-time discussion following which one of us will do the Same-Day Summary!