

How to Maximize the Same Day Summary

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Former employment attorney and author Jathan Janove writes for SHRM Online on how to inject greater humanity into HR compliance. Jathan welcomes your questions and suggestions for future columns. Contact him at the e-mail address at the end of this column.

Four years ago, I wrote a column on the "Same Day Summary" (SDS) (www.shrm.org/resourcesandtools/hr-topics/employee-relations/humanity-into-hr/pages/putting-humanity-into-hr-compliance-down-with-documentation.aspx), in which I urged employers to use the SDS instead of conventional documentation practices. I've heard from many HR professionals that they have done so, and they typically report positive results. Since then, I've had the opportunity to review a range of actual SDSs, and I think more can be done to maximize their value.

To recap, an SDS is a document you write *after* a conversation with an employee about performance or behavior issues. It summarizes what you think are the key takeaways from what was just discussed. In lieu of a signature or other formal acknowledgment of receipt, you simply request that the recipient(s) let you know if you missed or misstated anything.

It's that simple. To move, however, from SDS 1.01 to SDS 2.01, you should embrace the following:

LESS IS MORE.

Too many SDSs I've reviewed have too much information. There are no brownie points for comprehensiveness. I encourage clients to think *strategically*. From the conversation or meeting you just had, what's most important to convey and preserve in writing? Think in go-forward terms. What really matters?

The most effective SDSs tend to be the shortest. A few bullet points, and that's it.

BEWARE THE TENDENCY TO DECLARE.

Too many SDSs contain declarative sentences. Remember that it's not what you assert, what you think or what you feel. It's what you *capture*. From the discussion you've just had, what needs to be captured? What was said that really matters? What was agreed to? What's the game plan going forward? The most important thing you can do with an SDS is to preserve in writing the commitments that were made: "We agreed the following people will do the following actions by the following dates ..."

A SAME HOUR SUMMARY IS BETTER THAN A SAME DAY SUMMARY.

In hindsight, I should have called the tool the "Same Hour Summary." As Hermann Ebbinghaus demonstrated nearly a century and a half ago, our brains are sieves. Thanks to the Ebbinghaus Forgetting Curve (<https://www.mindtools.com/pages/article/forgetting-curve.htm>), if we wait a day to do the SDS, chances are we'll have forgotten something important. Moreover, it's more likely that recipients of our SDS will

remember things differently than we do.

Hence, I recommend that you do the SDS immediately after the discussion or meeting.

Suggestion: Tee up the SDS in advance by creating a draft e-mail in which you enter the recipients' addresses and fill in the subject line: "SDS—today's discussion about _____." Drop in the first two sentences: "Here's a summary of today's discussion. Let me know if I missed or misstated anything." All that's left now are the bullet points.

If for some reason you can't complete the SDS immediately after the conversation or meeting, I suggest you take real-time notes. They can simply be word prompts of what you'll subsequently want to put in the SDS. These notes will help you hold off the Ebbinghaus Forgetting Curve.

DON'T ADD THE SDS TO YOUR PROGRESSIVE DISCIPLINE POLICY.

Readers of my column know how much I abhor conventional (allegedly "progressive") discipline policies (www.shrm.org/resourcesandtools/hr-topics/employee-relations/humanity-into-hr/pages/progressive-employee-discipline-.aspx). The SDS should not be a supplement to one of these policies. It should replace the conventional discipline policy in its entirety. To my knowledge, no one has ever encountered an employee disciplinary issue that couldn't be handled effectively with an SDS.

DON'T LIMIT THE SDS TO EMPLOYEE DISCIPLINE.

Unfortunately, some employers have assumed the SDS is simply a new employee discipline process, which represents a lost opportunity. When employers don't make the SDS a basic ongoing form of communication, they miss out on its greatest benefits.

In my experience, the benefits of an SDS extend beyond the document itself. They include the focus and discipline an SDS provides during the meeting or discussion. Think about how many time-wasting meetings you've attended and unproductive conversations you've had. Would that meeting or conversation have benefited from the focus and discipline provided when the parties know that a short, targeted summary will follow? The SDS promotes constructive go-forward exchanges: What can we agree on? Where do we go from here? Who's going to do what by when?

Ask yourself, "Is anything said in this conversation or meeting worth preserving in writing?" If your answer is yes, craft an SDS. Chances are, you'll be thinking about expected future action, whatever it might be: "I agreed to do the following by the following date." "You agreed to do the following by the following date." "Our plan going forward is X." "We've agreed on the following." "Here's what's going to happen next."

And don't forget to add, "Let me know if I missed or misstated anything."

Jathan Janove is the author of Hard-Won Wisdom: True Stories from the Management Trenches (https://www.amazon.com/Hard-Won-Wisdom-Stories-Management-Trenches/dp/081443777X/ref=sr_1_1?s=books&ie=UTF8&qid=1514917568&sr=1-1&keywords=hard+won+wisdom) (HarperCollins/Amacom, 2017) and a master coach and practice leader with Marshall Goldsmith Stakeholder Centered Coaching. (<https://www.stakeholdercenteredcoaching.com/>) If you have questions or suggestions for topics for future columns, write to JathanJanove@comcast.net (<mailto:JathanJanove@comcast.net>).

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