

# **Your Professional Continuity Notes**

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This article is about the notes that professionals generate to supplement their memories relative to the people they serve. This includes doctors, lawyers, coaches, and leaders like you!

Doctors have patients. You can't expect your doctor, with dozens of patients seen daily, to remember that you were going to exercise more and change your diet in order to stop the increase in cholesterol levels in your blood. However, your commitment is right there in the notes next time you visit.

Attorneys have clients. Do you really expect that your lawyer, with dozens of open cases requiring attention, will remember the details of your daughter's DUI a year ago?

Coaches have clients, too. You don't really expect that I remember that it was nine months ago that we talked about the value of feedback and that I sent you two articles on the topic. I'm really not able to recall exactly when we celebrated your offering some insightful feedback to your boss!

You can't expect that any of these professionals have memories that are so powerful that they can remember the details of their commitments and counsel to those they serve.

So, I have a question for you. Do you make notes when you have one-to-one conversations with your direct reports? You serve these individuals. Do you have notes about their career aspirations, their development needs, the expectations you mutually generate for their projects, etc.?

If so, I'm sure those notes have served you well. If not, do you think those individuals are not as valuable as a doctor's patients or an attorney's clients?

The conversations you have with your direct reports are important to them. Do you think that your memory is so superior that continuity notes are not necessary?

I don't really need an answer (though you are free to send me one by e-mail if you so desire). Actually, the purpose of this article is to cause you to reflect on your habits. Should you start making notes of your conversations with and about the individuals under your authority?

Should you have a file in your desk for each one of your direct reports? Could you better organize your desk if you had a place to store the commitments you make and the information those individuals share with you (and you with them)?

One more thing. Have you noticed that your doctor and your lawyer don't give you copies of the notes they make when they consult with you? Have you ever wondered why? Have you ever asked?

I like to have continuity with my clients, and I know my memory is faulty. So, I make notes associated with every coaching conversation I have. Further, I want my clients to know what I've heard, what I've committed to do, and what followup I expect in holding them accountable for the commitments they've made. So, I share my notes with my clients, usually in the form of a followup e-mail.

I'm not advocating that you share your continuity notes with your direct reports. I am, however, advocating that you keep notes about conversations you have with those under your authority.

While you're evaluating whether that would be of value to you and to your direct reports, consider whether the frequency and depth of your conversations might be enhanced. Are you talking with that individual frequently enough about issues that are of interest to him or her?

Your doctor talks with you about what's of interest to you. Are you any less a professional?