The Importance of Having an Effective Action Culture

Insight from Nathan Zeldes, Jan. 28, 2014

Organizational culture is a fascinating subject – elusive yet critical to a company's success. An aspect of this that I want to discuss here is what I'll call (for lack of a better name) **Action Culture**. By this I mean the norms and expectations governing how action – the tasks required by the company's business – is determined, assigned, owned, and tracked to completion. By "tasks" I don't mean the 30,000 ft items like "add value to our stockholders", or the 10,000 ft ones like "design a reliable laser printer". I'm talking about the immediate tasks, the myriad action items defined in work meetings or dictated by day to day events and developments.

For example, say the phone rings and someone says there's a problem in the warehouse sprinkler system: who takes action? In case you think it doesn't matter, the world is full of the smoldering ashes of warehouses in companies where nobody took action, or the wrong person did, or the right person delayed it to a later time…

The concept of Action Items

Any company has its share of TLAs, but the first acronym you learn when you come to work at Intel Corporation has two letters: **AR**. This stands for Action Required, a synonym for Action Item: a task. An AR is implicitly composed of the action to be effected, a required completion date, and a named owner. This may seem trivial: every business would have such items, whether they call them AR, or AI (Action Item), or whatever. And yet the AR concept at Intel, which I'm sure goes back to its earliest days, had a presence in company culture that many companies lack. For example, there was the idea that if you found an AR lying around – saw a problem requiring solution – you were stuck with owning it until you either solved it or found another owner for it. You couldn't just ignore the problem and walk away. There was even a joking reference to a notional "AR Shield", which you were supposed to raise at meetings lest too many ARs attach to you. This idea of task ownership, easy to acquire and hard to lose, was so ingrained in the culture that I remember it well today, 32 years after my arrival at that amazing company. Every meeting ended with a written AR List, and these items were tracked to the timetable in the list. Action execution was crisp and tangible in that environment.

By contrast, I've seen organizations where action item ownership is fuzzy or non-existent, where people shirk responsibility for anything not in their immediate job description, where meetings don't even have minutes published, much less an AR list.

This recalls the Israeli concepts of Rosh Gadol and Rosh Katan (Big Head and Small Head) – meaning people who take initiative beyond the immediate work, and those who don't. You can hold a "nature vs. nurture" discussion on the origin of Rosh Gadol behavior, but the Intel AR culture very much requires this behavior; no one could last long in it if they evaded ownership of action.

How action items are born – and how they're laid to rest

Action items come into existence in a number of ways. Some are generated by management edict, as the command of one in authority. Others are assigned in meetings, and form part of the meeting's output. Still others are created spontaneously by people who see a task in need of doing and declare they'll do it; this is my favorite kind. In some cultures the assignee may decline; in some they may not.

The action culture of the company can dictate which of these mechanisms prevail, and how effectively they get serviced. In companies with a strict authoritarian culture the first mechanism rules supreme, so much so that action items defined further down may need to be validated by checking with the boss – an inefficient course instilled by bitter experience. In companies with too little discipline action items generated in meetings are often ignored, and need to be revived in the next meeting – or, worse, left to fade from memory.

A problem seen where employee empowerment is weak is that people are averse to make decisions, so lengthy meetings result in little real action. This sad state, where lower level employees lack the courage to decide what's best for the company, results in delays and sub-optimal activity. At the opposite end of the scale you see cultures where everyone has authority subject to clear rules; military hierarchy leaves no doubt that when all more senior levels of officers are dead or out of reach even a lowly NCO has full command. What's important is that the system in use is known to everybody and clearly communicated, so everyone knows what tasks they may decide to assign or accept.

To my mind, the best culture is one where senior managers guide and advise, but even junior employees are empowered to make the decisions and confident they won't be censured for doing so. Naturally, this impacts the hiring and employee development policies of the company: if you want junior people to make decisions usually reserved for their superiors, you need to bring on board and nurture the kind of people who have the required character and intelligence to do so.

Another question is how decisions are made when there are differing views. You want to have a lively discussion, with everyone presenting their possibly diverse views, but you need everyone to accept the decision once it's made. Here too having a clear culture is key: whether decisions in a group are made by the most senior manager present, or by a vote, people must know what to expect. At Intel we had a formal concept called "Disagree and Commit": you could argue your point – even against the views of managers high above you – but once a decision was made, you were to support it fully whether or not you'd favored it beforehand. I can't overstress the value of this idea: it ensured that once an action decision was made, the entire group was ready to push it to completion.

And in the end, action items must die. How this is handled is also a matter of cultural expectations. Ideally, once you assign someone an AR with a "Complete by" date, you shouldn't have to follow up at all – a serious employee will see to it that the date is met and the action is done. Employees like that are very rare, so this isn't a reliable method in reality. Instead, there are methods for tracking execution and reporting completion, and any disciplined culture will prescribe how such reporting is to be handled. As an old saying goes, "If you've executed and haven't documented – you haven't executed". In addition to a variety of task tracking software platforms, there's the simple option of reporting the completion in the same way the task was born – in the recurrent meeting where it had been assigned. An action item status review makes an excellent way to start a meeting, and can then go into the meeting minutes. I prefer to have a section at the end of the minutes that is divided into

“Old action items” and “New action items”. But of course, many organizations haven’t even heard of proper meeting minutes, and their action items are written on ice.

The question of priorities

These days there are often more action items than hours in the day... and then you have to prioritize; how this is handled is a key cultural element.

Military culture has a clear answer: you act on the most recent order from a superior. In fact, there is an elegantly coherent principle they use: if officer A told you to do X, and officer B then came and told you to do Y instead, you must tell B what A said – and do what B decides you should do after he has that information. Ours not to reason why...

In a company this is seldom enough, what with self-assigned action items. So assume you have two things that need doing today, and only time to do one. Which one do you choose? Some company cultures empower you to decide on your own, trusting you to figure what’s best for the company’s mission. In others, you ask your supervisor. And in some, the boss then orders you to do both, which is a very poor idea. Telling people to do what is patently impossible sends a double message and can only undermine trust in the manager.

A pitfall you want to avoid is having such an abundance of action items that nobody takes them seriously, because they know there’s no way they can all be completed. This problem was the death of one major task tracking system I’ve seen at a large plant: it enabled anyone to assign tasks to anyone else, which quickly filled up the system with moribund tasks until it had to be abandoned. What was missing was a process where assignees would need to agree to accept the tasks up front.

What you can do to make things better

I’d recommend you take a long hard look at how action is regulated by culture in your organization. Look in particular for formal or de facto norms of the kinds I discuss above, norms that dictate the lifecycle of tasks from creation to completion. Then ask yourself, first, are the norms any good – and second, are they followed?

If you see room for improvement, for change, roll up your sleeves... changing culture isn’t easy. But then, hopefully you know that already. If I can help, feel free to drop me a line.

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For more insight articles on Knowledge Worker Productivity, see here. You may also want to check out Nathan’s blog at www.nathanzeldes.com, and consider subscribing to his RSS feed and to his Newsletter on that site.

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