SBAR – SITUATION / BACKGROUND / ASSESSMENT / RECOMMENDATIONS MODEL

WHO NEEDS TO USE THE SBAR MODEL?

The SBAR is a great way to structure interactions and can be used in a variety of settings.

- By anyone who needs to process through the story quickly and get to the core of the issue.
- By any leader who wants to make good use of the infamous "You got a minute?"
- By any leader who wants to make sure that an employee has already processed through the story. It can be used as a guide for the employee's thought processes, and to bring you up to speed and solicit your help, decisions, and approval in an efficient way.

WHAT IS THE SBAR MODEL?

This Situation-Background-Assessment-Recommendations Model…

- Helps to guide the thinking of the employee by eliminating emotional waste in the system.
- Standardizes the thinking process.
- Makes things concrete and developmental needs obvious.
- Can be applied to real-world situations in the moment.
- Provides unique insight to others' thinking.
- Most importantly, makes the best use of the time you, as a leader, have, and ensures that the work is being done at the appropriate level – it gets you back to leading instead of over-managing.

WHY SHOULD YOU USE THE SBAR MODEL WITH YOUR TEAM?

Focus and energy are what we know for sure, to the next best thing to do to add value, and to create ideas to enable success. When employees bring their SBAR worksheets to you, they will have already processed through their work – moved out of the drama and really edited down their stories, using critical thinking to present the situation from a neutral place.

It provides insight for the leader and gives a great window into how employees think, where they need development, and how fluent they are in reality-based thinking – it keeps them fact-based and shows them where they need further information from their leader.

Employees can review multiple SBARs with you in a very short timeframe. Through the leader's review of the SBAR and coaching on each item, employees develop and can come to think in ways that are more aligned with the leader and organize in ways that are proven to create great business results.

Over time, employees can collect a series of SBARs and extract key themes to live by based upon their experience of consistent direction from leadership. These SBARs can actually create a knowledge base for the individual employee, as well as great case studies to onboard and develop employees, and ultimately they will expedite consistent decision-making throughout the organization.

Using the SBAR model will conserve energy and put attention on solving issues rather than on living in the drama. This tool is the key technique in diffusing drama and driving results. It depersonalizes all issues and moves us into a professional space where we can offer our best ideas. Eventually this way of processing information and presenting it in an efficient way will become intuitive for all on the team.

IN-DEPTH SBAR FOR THE LEADER

The SBAR is broken down into four succinct points and should be able to fit on a single slide or piece of paper. Each section should only be a few sentences max.

SITUATION

This section includes a concise statement of the current situation– the facts, no drama, and minus all of the symptoms. A straight- forward statement that captures what we know for sure about the current state of affairs.

As a leader, when you are looking over this section…
- Is this representation of the situation fact-based? Clean? Accountable? Straightforward?
- Is this representation accurate? The bottom line? A simple statement of current reality?

BACKGROUND

This section includes a concise statement of the relevant back- ground data points that need to be taken into account as we decide how to move forward. As a leader, when you are looking over this section…
- Are there vital pieces of information and history left out?
- Any items that the employee may not be aware of or may be minimizing?

Seek to enhance the understanding of the employee and the many factors influencing the situation.

ASSESSMENT

This section outlines the author's analysis of the current situation. If the "S" is the "WHAT," then the "A" is the "SO WHAT." What difference does it make? Why should we be concerned? What is the root cause? What aren't we tending to? What are the main concerns and major risks? What sense should I make of this? This section is about good diagnostics and good interpretation of the situation.

As a leader, when you are looking over this section, you have a great opportunity to see the level of critical-thinking skills an employee currently has, and to gain insight into his or her strengths and weaknesses in problem-solving. Use questions to drive critical thinking. Also, be aware of the tone of the analysis:

- Is it based upon accountability, or is it coming from a place of "victim" thinking or Learned Helplessness?
- Does it get at the root cause?

If you see development needs here, teach by thinking out loud, asking great questions and teaching problem-solving techniques.

RECOMMENDATIONS

This section contains the author's recommended action and next steps. These recommendations need to be focused on improving or solving the situation with attention to the unique circumstances in the background. It should be driven by the assessment. As a leader, when you are looking over this section, look for the merit of the recommendations.

- Do they actually address the situation?
- Are they feasible?
- Do they match company philosophy and policy?
- Do they balance organizational and customer needs?
- Are they sustainable?
- Are they creative?
- Do they initiate a transactional effort, or could they be transformational?
- What might they jumpstart on a process improvement?

Help the employee see creative and multiple options.

SBAR WORKSHEET

YOUR NAME:
DATE:
PROPOSED PROJECT TITLE / ISSUE TITLE:

Note: When making a recommendation, close the loop and make sure both parties agree on the next steps.

SITUATION

What is happening now?
Briefly describe the current situation. Give a clear, succinct overview of the main problem.

BACKGROUND

What relevant factors led up to this event?
Briefly state the pertinent history. What got us to this point? Is this an issue that happens frequently?

ASSESSMENT

What do you think is going on?
What improvements would we see if we made a change? (Examples: improved efficiency, improved employee morale, increased customer/client satisfaction, better communication among staff.)

RECOMMENDATIONS

What action do you propose?
What actions are you asking for? How can you help make this change a reality? What is the simplest, fastest, yet most thorough way to make this happen?