

BUSINESS VITAMINS

SBAR (Situation – Background – Assessment – Recommendation) Model

Introduction

SBAR was developed by the military and then adopted by clinicians in the healthcare industry to help relay critical information about patients or situations to others. The tool helps individuals organize information in a concise manner that helps the recipient - usually a decision maker - have all the information they need in one location.

Today, the SBAR has been adopted by the non-profit and business communities because it empowers everyone in the organization with a tool they can use to successfully present information and decrease the time required to make decisions.

In a business setting, SBARs are recommended whenever someone needs to present a situation and make a recommendation for action. This is especially helpful when presenting information to your manager or supervisor since it gives him/her all the information that s/he needs to make a decision in one concise email or document.

SBARs are not meant to replace conversations - they are designed to consolidate all of the necessary information into one location so that all participants are working from the same information, and decisions can be made more quickly. SBARs also allows a manager to fill in any gaps in your background information if needed since SBARs help all parties be aware of the grouping of facts you are using to make your recommendation.

Definition

SBAR stands for Situation, Background, Assessment and Recommendation. SBAR (Situation, Background, Assessment, Recommendation) is a spoken or written communication strategy that aids in the provision of critical, brief information, typically during critical situations. SBAR can even replace an executive summary in a formal report in some situations because it provides concentrated and clear information.

When to use it

A popular use of SBAR in the workplace is within emails. You can list out each section within the body of the email, which helps the recipient follow your thinking and recommendation.

You can also use an SBAR to help organize your thoughts for a conversation or a presentation.

Details

Here are the four sections of SBAR:

Situation: This is the reason for the email, call or conversation. This is stated simply and helps the recipient ground themselves in the reason for the interaction.

Example:

We have a 3 years laptop for the commercial team. The current laptop is outdated and does not serve our need to complete our day-to-day tasks.

Background: These are the core facts that the person you are speaking with/emailing need to know. These are FACTS, not OPINIONS (that comes later). The facts may include information that the person needs to know to reacquaint them with the problem or situation. Key, relevant, important facts are listed here - usually in bullet points. This is often the longest section but still needs to be concise. State any key deadlines or budget numbers, including factual implications if the decision is or is not made.

Example:

The new laptop with fast processor is sold by XYZ Information Technology Company, a national leader in electronic and IT products. They are promoting a laptop with the new processor for a price of \$1,500 for each laptop. We estimate the total cost with 3 years extended warranty to be \$1,550 for a high-quality laptop.

Our budgeted price for new laptop is \$1,500.

Out of the 5 Information Technology companies we have, XYZ Information Technology is offering the new laptop for a discount of 35%. And another company is promoting a 20% discount. The other 3 companies are not offering any discount. The offered discount by XYZ Information Technology will be ending in Four days.

Assessment: This is where your expertise is leveraged. Based on your understanding of the situation and the facts - and your expertise - this is your assessment of the situation. Benefits and risks that are rooted in your assessment of the situation may be listed here.

Example:

Based on the market pricing for the new laptop processor, this promoted price is very attractive. The technical specifications of the laptop is high and meet all of our the requirements. We must take in consideration that the extended warranty is a bit higher than the average market price.

Recommendation: This is required and the meat of the conversation. You have to recommend what you think needs to happen based on the background (Facts) and Assessment (Your understanding and opinions). Clearly state what you think needs to happen. This is not where you make your case - your facts and assessment should do this. This is simply what you want to happen. Be concise.

Example:

I recommend that we go ahead and buy the new laptop processor for \$1,500 from XYZ Information Technology Company. Since the laptop comes with Two years warranty, we will not consider the extended warranty.

