Using Checklists to Increase Consistency and Productivity in Communications Tasks

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- *Using Checklists to Increase Consistency and Productivity in Publication Tasks*
  - Presented as a Spotlight Talk at Spectrum in March
- *Using Checklists for More Efficient Editing*
  - Presented as a breakfast roundtable at the AMWA conference in 2011, 2012, and 2013
  - Conducted as a progression at Summit in 2012 and 2016.
- *Using Editing Checklists for More Efficient Editing*
  - Article in *AMWA Journal* (Dec 2013)

Poll

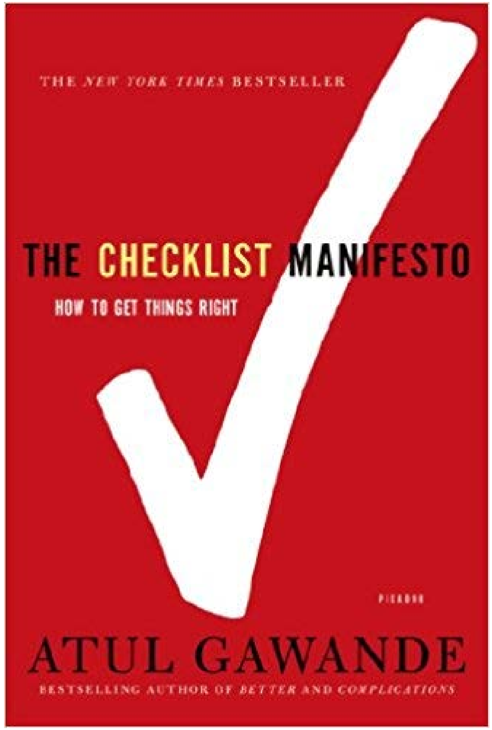
Agenda

- ✓ Introduction
- ✓ Why use checklists?
- ✓ How do you get started?
- ✓ How do you know you have good checklists?
- ✓ Requirements
- ✓ Questions? Testimonies?
- ✓ Resources

The Checklist Manifesto

by Atul Gawande

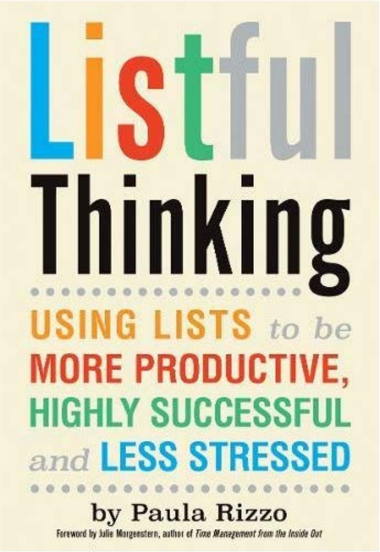
- ✓ Surgery checklists save lives
- ✓ Aviation checklists are essential components in cockpits
- ✓ Construction checklists keep large scale projects on time and safe



Listful Thinking: Using Lists to be More Productive, Highly Successful and Less Stressed

by Paula Rizzo

“““It takes mental work to keep things files and stored and organized in your brain. And I think we underestimate how taxing it is to think.”



Why use checklists?

"Good way to stay on track"

"Keeps me from overlooking the obvious"

"Provides for a more systematic, uniform, and consistent approach to editing"

Why use checklists?

"Because they make editing faster and less dependent on my 'sharpness' or mood on a given day"

"Ability to justify my time spent on editing"

"Always know what was and was not checked"

Productivity

- ✓ Stay on task
- ✓ Stop and start with less loss of focus and more confidence
- ✓ Consistency of your process provides a nice rhythm to task
- ✓ Track metrics and accurately estimate future projects

Consistency

- ✓ Enhanced productivity
- ✓ No back and forth with style guide on simple questions
- ✓ No forgotten steps
- ✓ Deliberately skipped steps are documented

How do you get started?

1. Choose a task
2. Grab a blank piece of paper
3. Start to do the task
4. Write down every step
5. Type it into a file
6. Add specifics
7. Puts steps in the optimal order
8. Add mechanics
9. Add tracking items
10. Test
11. Revise
12. Test
13. Revise
14. Use it

1. Choose a task

What Types of Tasks Need Checklists?

- ✓ Multiple repeated tasks
- ✓ Processes with lots of details
- ✓ Processes with a lot of steps
- ✓ Tasks within systems that change frequently
- ✓ Docs with styles that change frequently
- ✓ Similar tasks that have small details that are different
- ✓ Tasks where you want to track metrics

2. Grab a blank piece of paper

3. Start to perform the task

4. Write down every step

Don't brainstorm what needs to be done on a sheet of paper and call that a checklist!

5. Type everything into a file

Don't edit yourself too quickly

Do create boxes for checkmarks

Instructions Use this checklist for US and Global SRs that need a standard edit.	
Owner: ___________________ **Product:** ____________________________ **Editor:** _____________ **Date Received:** ________ **Date Due:** _______ **Rush:** Yes No **SR#:** _______________________ **Approve/Activate:** Yes No **Track Changes:** Yes No **# of Pages:** ________ **Time:** _____ START _____ STOP _____ SPENT **Date Completed:** ________ **Entered in Tracker:** ________	
	CHECK OUT DOCUMENT FROM VAULT • Make sure it saves to your Documents folder. • Make sure it is 97-2003 format. (*Ex:* .doc not .docx)
	FORMATTING
	Turn on "Track Changes" for Brilinta, Global, and other SRs as requested
	Check SR Footer • Confirm that SR # is in footer. • If it is not, copy SR Document Number from **General Properties** and Paste Special into footer. • Check/correct AstraZeneca name: o US SRs: AstraZeneca LP o Global SRs: AstraZeneca
	Change Font Size of Normal Style to 11 pt
	Check/Correct Font Sizes in Document • Footer: 11 pt Times New Roman • Body text: 11 pt Times New Roman • Text in table/figure titles and in tables: 10 pt Times New Roman • Footnotes in tables/figures: 9 pt Times New Roman • References: 10 pt Times New Roman
	Check/Fix Justification Make sure body text, bullets, and references are left justified.
	Check/Fix "Keep with Next" near headings and tables (and within tables)
	Check/Fix Spacing in Bulleted and Numbered Lists Make sure bullets and numbers begin at the left margin and the tab is only .25" for each level. **Summary** Make sure this section has bulleted items, with 1 paragraph space between each bulleted item. (Make sure there are no paragraph spaces between sub-bullets.) **Clinical Data** Make sure there are no paragraph spaces between bulleted items.
	Check/Modify Headings and Sections of Document Look for consistency in heading levels, order of sections, and use of bullets.
	Heading Level 1 **SR Sections** (*Ex:* **Summary**; **Background**; **Clinical Data**) **Heading Level 2** **Topic or Name of Trial** (*Ex:* **Pharmacokinetics, The SAVOR Trial**) Heading Level 3 Study Citation. (*Ex:* Wallentin et al. *N Engl J Med*. 2009;361:1045-1057.) Heading Level 4 Topic: (*Ex:* Objectives, Methods, Baseline Patient Characteristics, Results) *Heading Level 5* *Topic:* (*Ex: Design, Patients, Treatment Arms/Dosing, Primary Endpoint(s)*) *Heading Level 6* *Topic*

TABLES/FIGURES

Check/Fix Table/Figure Numbers in Text

- Change any table/figure number mentioned in body text (*Ex:* "see Table I") to refer to the next table or figure (*Ex:* "as shown in the following table") where appropriate.
- Count tables and figures; ensure tables and figures are numbered consecutively in bold capital Roman numerals. (*Ex:* **I, II, III, IV, V**)

Check/Fix Table/Figure Titles, "Adapted from" lines, Endnotes/Cross-references, and Footnotes

- Make sure "TABLE" and "FIGURE" are ALL CAP and bold. (*Ex:* **TABLE I, FIGURE II**)
- Make sure a colon and 2 spaces follow the table/figure number, the table/figure title is **bold** and Initial Caps, and the title ends with a period. (*Ex:* **TABLE I: Title Title.**)
- Ensure there is an "Adapted from" line (not bold) or an endnote/cross-reference after the title.
- Ensure footnotes are indicated with superscript lowercase letters in alphabetical order (a-z) and that spaces are not superscripted.

Check Table Formatting

- Highlight each table:
  - Table Tools/Layout/Properties, ensure table is left aligned and the indent from left is .10".
- Make sure units of measure are specified in stub head, column headings, or row headings, but not duplicated in cells.

Stub Head, n (%)	**Column Heading**	**Column Heading**	**Column Heading**
Row Heading			
Row Heading	Data in cell	xx (xx)	xx (xx)
Row Heading	xx (xx)	Data in cell	xx (xx)
Row Heading	xx (xx)	xx (xx)	Data in cell

- Make sure stub heads, column headings, or row headings and shaded rows match the following:
  - Text is **bold** and Initial Cap.
  - Stub head text is left justified and bottom aligned.
  - Column heading text is centered and bottom aligned.
  - Row heading text is left justified and center aligned.
- Ensure shading is correct:

Ensure colors are used in correct order:

- White, background 1, Darker 25% (third grey down, shown as selected in screenshot)
- White, background 1, Darker 15% (second grey down)
- White, background 1, Darker 5% (top grey)

- Make sure body cell text matches the following:
  - Text is sentence case and not bold.
  - Text is centered in cell (horizontally and vertically); text in left-most column is left justified and center aligned.
  - Bullets within tables are left-aligned and indented to half of the usual .25" indent.
- If a table is very long and has to break between pages, ensure that header rows are repeated.

STYLE

Check/Fix Product Names

- AZ products:
  - US SRs include BRAND NAMES.
  - Global SRs use generic names only.
- Competitor products:
  - TITLE: generic name (Product Name®).
  - First mention in BODY: Product Name® (generic name, Manufacturer). Thereafter, the generic name should be used.

Check/Fix Capitalization in Headings and Subheadings

Capitalize:

- Nouns, pronouns, verbs, adverbs, and adjectives; first word after a colon; first and last words
- Prepositions of ≥4 letters (*Ex:* With, From, Into, Onto)

	FINAL TOUCHES
	Run Spell Check
	Update Fields for Cross-references
	Change View to 100% and Look Over SR One More Time • Make sure tables still break cleanly over pages • Replace bad line breaks with non-breaking hyphens or spaces
	Save Document
	CHECK DOCUMENT BACK IN TO VAULT • Indicate what was done to the SR in the Description box (*Example:* Standard edit/tracked).

	Check General Properties
	• Check that the following fields are populated: Type, Subtype, Classification
	• **Name**: Make sure the name matches the SR name *exactly* and the drug name is spelled correctly
	• **Brand/Generic**: Make sure this field is populated with brand and generic names for US SRs and generic name only for global SRs.
	• **Summary**: Make sure this field contains the following: country that created the SR (*Example*: US, Global), if the SR is available for distribution, and a concise description of the SR.
	• **SR Category:** Make sure field is populated. If not, query author.
	• **Document Number**: Make sure the number in the SR footer matches the document number.
	• **Expiration Date**: Make sure date is about a year away (2016).
	• Check that the following fields are populated:
	  o Country/Area
	  o Language
	  o Intended Use
	  o Approved for Distribution
	  o Legal Hold (query author if not populated)
	  o Off Label (query author if not populated)
	• **Parent Name (global SRs only)**: Make sure this field matches the SR name *exactly*.

	Check Rendition in Viewer • Refresh page • Open in Full Screen • Look for endnotes and cross-references coming in at a different size than the rest of the text or cross-references coming in not superscripted • If issues can be easily fixed; fix them. If the fixes are more complicanted, work with author to fix them.

	Complete the Task
	• Click **Complete**.
	  o Click **Approved** if the instructions were to edit and activate and you have no questions.
	  o Click **Approved** if the instructions were to edit and track changes and other reviewers are included in the review cycle.
	  o Click **Not Approved** if the instructions were to edit and track changes and other reviewers are not included in the review/approval cycle.
	  o Click **Not Approved** if the instructions were to edit and activate but you have questions.
	    ▪ Leave a comment at the bottom of the document.
	    ▪ Email the author.
	• Check expiration date.
	• Click **Complete**.

	Find and Replace / Fixes / Great Catch!

6. Add specifics

Don't just say, "Check headings" on an editing checklist

Do show how the headings should look

	Check/Modify Headings and Sections of Document Look for consistency in heading levels, order of sections, and use of bullets.
	<u>HEADING LEVEL 1</u> **<u>SECTIONS</u>** (*Ex:* **<u>SUMMARY</u>**; **<u>CLINICAL STUDY/CLINICAL STUDIES</u>**) **Heading Level 2** **Topic or Name of Trial** (*Ex:* **Phase 3 Trial**) **Heading Level 3** **Topic.- (*Ex:* Design, Safety, Results) – Text follows after; it's not on its own line** *<u>Heading Level 4</u>* *<u>Topic—-</u>* Text follows after; it's not on its own line

6. Add specifics

Don't say,
"Post event to Twitter" on a social media checklist

Instead, spell out details like this:

"Write a 280-word post with details of the event that includes the following:

- Date
- Time
- Speaker
- Topic
- Location
- Address
- Ticket prices
- Day ticket sales close"

7. Puts steps in the optimal order

Don't brainstorm what needs to be done on a sheet of paper and call that a checklist!

Do list what needs to be done in the optimal order for the task to be done efficiently and correctly

8. Add mechanics

Don't add instructions for how to do things unless they are new or confusing

Do include "Perform Spell Check"

Do include "Update Table of Contents"

9. Add tracking items

Do include

- Start and stop times
- Due date
- Length of document

10. Test
11. Revise
12. Test
13. Revise
14. Use it

Do revise again when things change

How do you know you have good checklists?

- ✓ When you have piece of mind when working on something
- ✓ When you start a new type of project and you feel lost without a checklist
- ✓ When you are confident you have completed a project because you have checked everything off on your checklist

How do you know you have good checklists?

- ✓ When you find an error your editing checklist told you to look for
- ✓ When you almost forgot to post to that third social media site until the checklist told you to post to it
- ✓ When you are asked for metrics and you can confidently give an estimate because you have the data in your checklists

Requirements:

- ✓ Create them for your own use
- ✓ Test and rework to get them right, then update and change as needed
- ✓ Create them for editing tasks, writing projects, social media work

Poll

Questions?

Testimonials?

Resources

- ✓ Gawande, Atul. *The Checklist Manifesto: How to Get Things Right.* New York: Henry Holt & Company, 2010.
- ✓ Rizzo, Paula. *Listful Thinking: Using Lists to be More Productive, Highly Successful and Less Stressed.* New York: Start Midnight, LLC. 2014.
- ✓ Schrank, Kelly. "Using Editing Checklists for More Efficient Editing." *AMWA Journal*, 2013:164-166.

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