Build a Better Checklist for Your Communication Tasks

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- Technical writer and editor for over 20 years in variety of industries
  - Associate Fellow of STC
- Medical editor for 10 years in pharmaceutical industry
  - Member of American Medial Writers Association (AMWA), Board of Editors in the Life Sciences (BELS), Editorial Freelancers Association (EFA)
  - Certified Editors in the Life Sciences (ELS)
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  - Niche: Editing formulary dossiers
    - Consistency, Structure, and Clarity
    - Microsoft Word

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Checklist Specialist

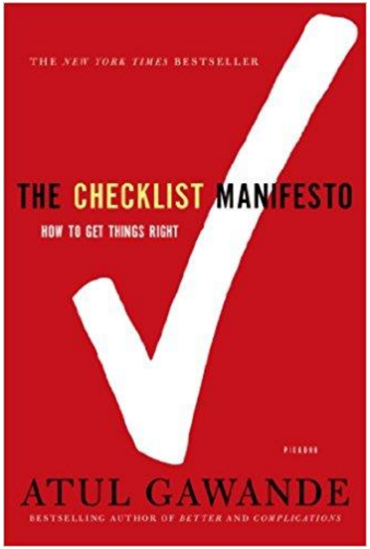
- ✓ Presented as a webinar for Rocky Mountain Chapter of STC November 2019
- ✓ Presented as a webinar for Lone Star Chapter in February 2019
- ✓ Presented as a webinar for TC Dojo in January 2019
- ✓ Presented as a webinar for STC in May 2018
- ✓ Presented as a Spotlight Talk at Spectrum in March 2018
- ✓ Presented as a breakfast roundtable at the AMWA conference in 2011, 2012, and 2013
- ✓ Conducted as a progression at Summit in 2012 and 2016.
- ✓ Article in *AMWA Journal* (Dec 2013)

Agenda

- ✓ Introduction
- ✓ How do you get started?
- ✓ How do you know you have good checklists?
- ✓ Summary
- ✓ References
- ✓ Questions? Testimonials?
- ✓ Contact

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



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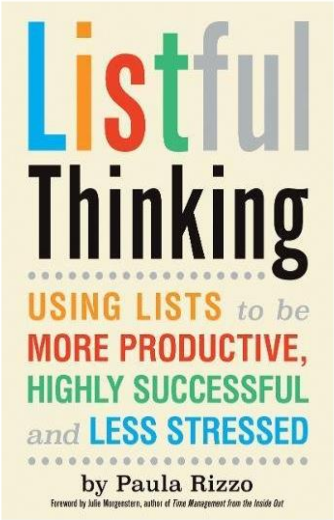
Listful Thinking by Paula Rizzo

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



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Advocate for a special kind of checklist

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

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Why should you use checklists?

Efficient

- ✓ 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

Consistent

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

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

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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 every little thing into a file

Don't edit yourself too quickly

Do create boxes for checkmarks

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

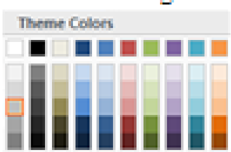
Check Table Formatting

- 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.

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. Put steps in the optimal order

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

	FORMATTING
	Check Margins: 1" on top, bottom, left, and right
	Check Footer: Left side should say: Section X.X or References or Abbreviations Right side should have auto-pagination: Page X of X
	Check for Keep with Next near headings and tables
	Check that spacing between paragraphs is consistent: spaces (¶) or consistent spacing before and after (3pt/6 pt).
	Check Bulleted and Numbered Lists Make sure bullets and numbers begin at the left margin and that the tab is only .25 for each level.
	Check Size of Font • Body Text: 10 pt Times New Roman • Headings: 12 pt Times New Roman
	Check Justification • Check that body text, bullets, and references are left justified.
	Check Spacing • Do a Find for period followed by 2 spaces; replace with period followed by 1 space. • Do a Find for 2 spaces; replace with 1 space..
	Check Headings and Sections of Document: Look for consistency in heading levels, order of sections, and use of bullets.
	2.2 HEADING LEVEL 1: Bold, Small Caps 2.2.1 HEADING LEVEL 2: Roman, Small Caps 2.2.1.1 Heading Level 3: Roman, Initial Caps (no number) Heading Level 4: Underlined, Initial Caps (no number) *Heading Level 5*: Italics, Initial Caps (no number) Heading Level 6: Roman, Initial Caps

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"

	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!

Template:

ITT		ITT Information Technology SOP
Title:	Rev: X	Effective Date: XX/XX/2019
Author:	Function:	
Approver:	Page **1** of **2**	

Title: make sure it's consistent on all headers and footers and title of doc.

Author: this should be the SME

Approver: this should be the manager

Rev: this should be A unless there is history on the last page

Effective date: this should be date it was sent to Frank

Function: this is team, such as Enterprise Desktop, NVV, WinTel, TAC.

Date	Rev	Change Made and Reason	Person Responsible
XX/XX/20XX	A		

9. Add tracking items

Do include

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

Editor Checklist
Standard Responses

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:** ________

Slide Deck Conversion Checklist

Handler: ________________________ **Title:** ____

Brand: ___________ **Due Date:** _____________ **# of Pages:** _____ **Editor:** _______________

Keep the Chart on the Following Slides With the Existing Color Scheme: _________________________

Date: _________ **Time:** _____ START _____ STOP _____ SPENT **Entered in Spreadsheet:** _______

Client:

Time: _____ _____ _____ Time: _____ _____ _____ Time: _____ _____ _____

START STOP SPENT START STOP SPENT START STOP SPENT

	Run Spell Check
	Clean up author section • Ensure consistent names, titles, and locations
	Edit titles
	Edit main text
	Run Spell Check
	Save Document
	Email back to client

	Run PerfectIt
	Clean up author section • Ensure consistent names, titles, and locations
	Edit abstract Make sure it has the following sections: • Background • Methodology • Results • Conclusion **Count number of words and compare to journal requirements:** Journal Req: -- Abstract:
	Edit keywords
	Edit main text Make sure it has the following sections: • Introduction • Methodology • Results and Discussion • Conclusion
	Count number of words and compare to journal requirements: Journal Req: -- Main text:

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 peace 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

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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

Summary

- ✓ 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

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References

- ✓ 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.

Questions? Testimonials?

- Do you have any questions?

???

- What can you add to your toolbox?

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Thank you for attending!

Feel free to contact me with questions:

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