

Build a Better Checklist

Kelly Schrank



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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 AMWA, Board of Editors in the Life Sciences (BELS), Editorial Freelancers Association (EFA), the Association for Independent Information Professionals (AIIP), Presentation Guild
 - Certified Editor in the Life Sciences (ELS)
- Currently Head Bookworm at Bookworm Editing Services
 - Niche: Editing formulary dossiers
 - Consistency, Structure, and Clarity
 - Microsoft Word

Checklist Specialist

- ✓ Presented as a webinar as part of the STC South Central Texas Mini-conference in April 2020.
- ✓ Presented as a webinar for Rocky Mountain Chapter of STC November 2019
- ✓ Presented as a webinar for Lone Star Chapter of STC 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)

How Did I get Here?

I. STANDARD RESPONSE REVIEW PROCESS (SRRP) AUTHOR, REVIEWER, AND EDITOR CHECKLISTS

The following checklists are to be used by the author, reviewer(s), and editor of a SR. The checklist will clearly delineate the responsibilities among them to allow for a more comprehensive and concise process.

The AZ MR consult should review the current database and PIR trends to determine if a SR should be created or if information in an SR should be separated (or combined) from current SR(s) to concisely address a commonly asked unsolicited request for medical information.

A. Author Checklist

The author is defined as the writer of a new SR or someone who updates an existing SR.

1. The author, under guidance from the AZ MR consult, is responsible for the review of current literature to determine if a SR should be revised, updated, combined (or separated), frozen, or retired. Additionally, any label changes that impact SRs would also be updated by the author.
2. The author must place the newly-created SR or a SR with major content changes into SRRP via WEBSTER. Please refer to the SRRP document for information on how to start and complete the process.



Please tell us:

- Name
- Where you are
- What you do
- Are you a Checklist Specialist? (ie, are you using checklists)?
 - If yes, what types of tasks?
 - If no, why not?



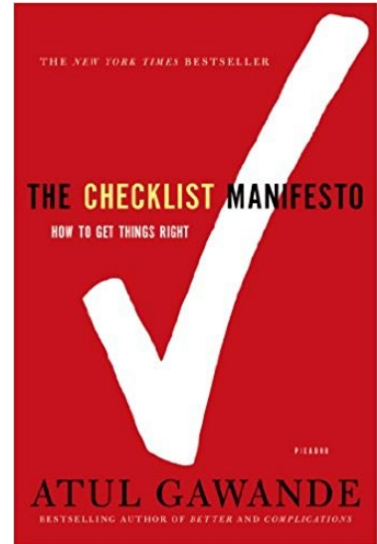
Let's Talk

Agenda

- ✓ “Existing Literature”
- ✓ Introduction to comprehensive checklists
- ✓ **Let’s talk about our checklists and help one another as a group**
- ✓ How do you know you have good checklists?
- ✓ Summary
- ✓ References
- ✓ Questions? Testimonials?

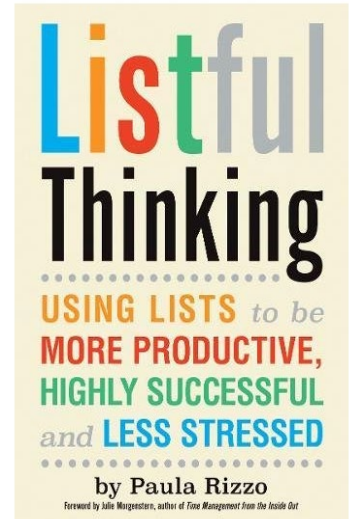
The Checklist Manifesto by Atul Gawande

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



Listful Thinking 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.”



Advocate for a special kind of checklist

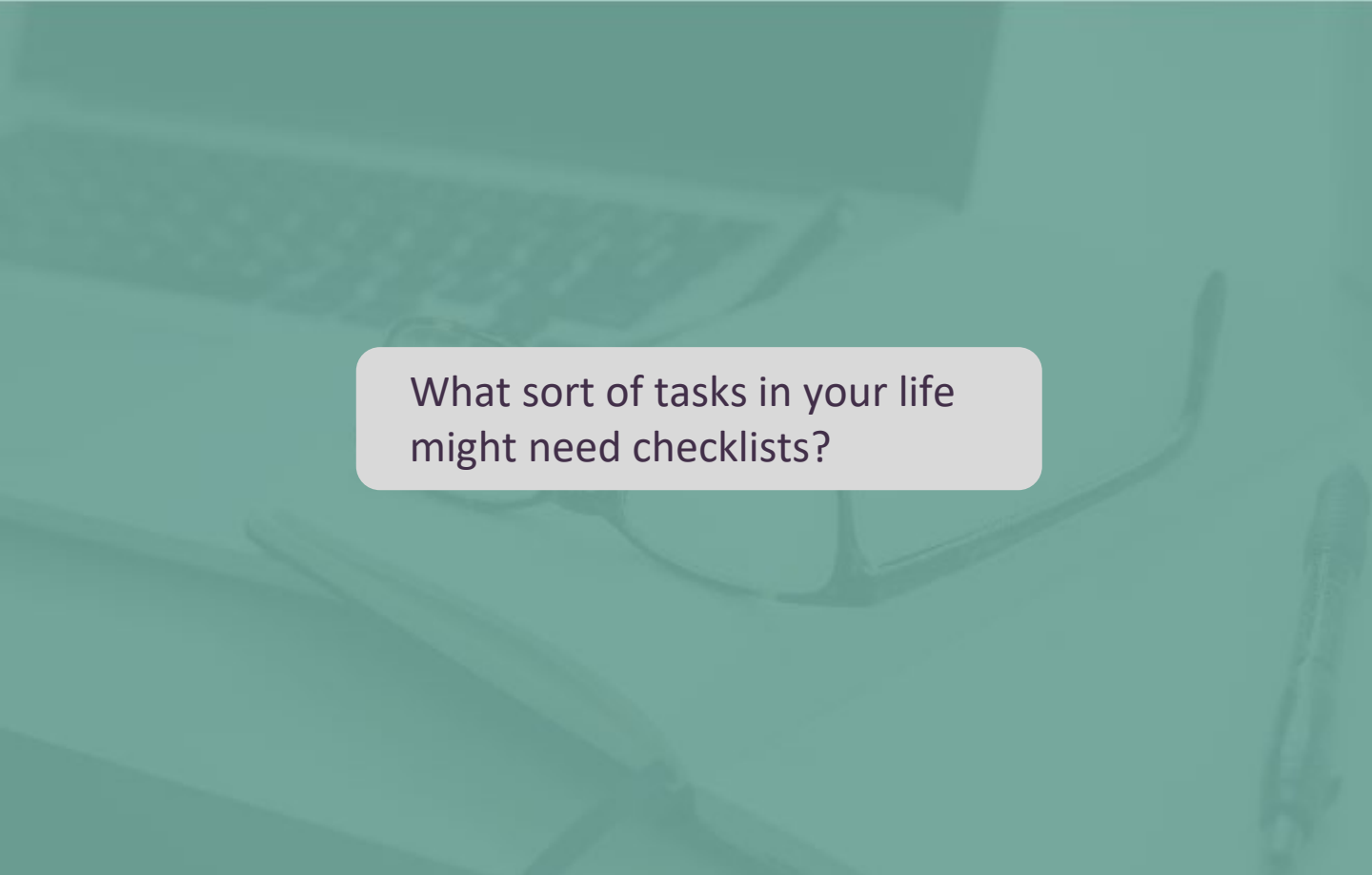
- ✓ Create them for your use
- ✓ Test and rework to get it right, then update and change as needed
- ✓ Create them for editing tasks, writing projects, social media work, business tracking and tasks

How do you get started?

1. Choose a task
2. Document your actions
3. Write down every step
4. Type it into a file
5. Add specifics
6. Puts steps in the optimal order
7. Add mechanics
8. Add tracking items
9. Test
10. Revise
11. Test
12. Revise
13. Use it

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



What sort of tasks in your life
might need checklists?

Let's Talk

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

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

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.

- Do you have any questions?



- What can you add to your toolbox?



Let's Talk

Thank you for attending!

Feel free to contact me with questions:



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