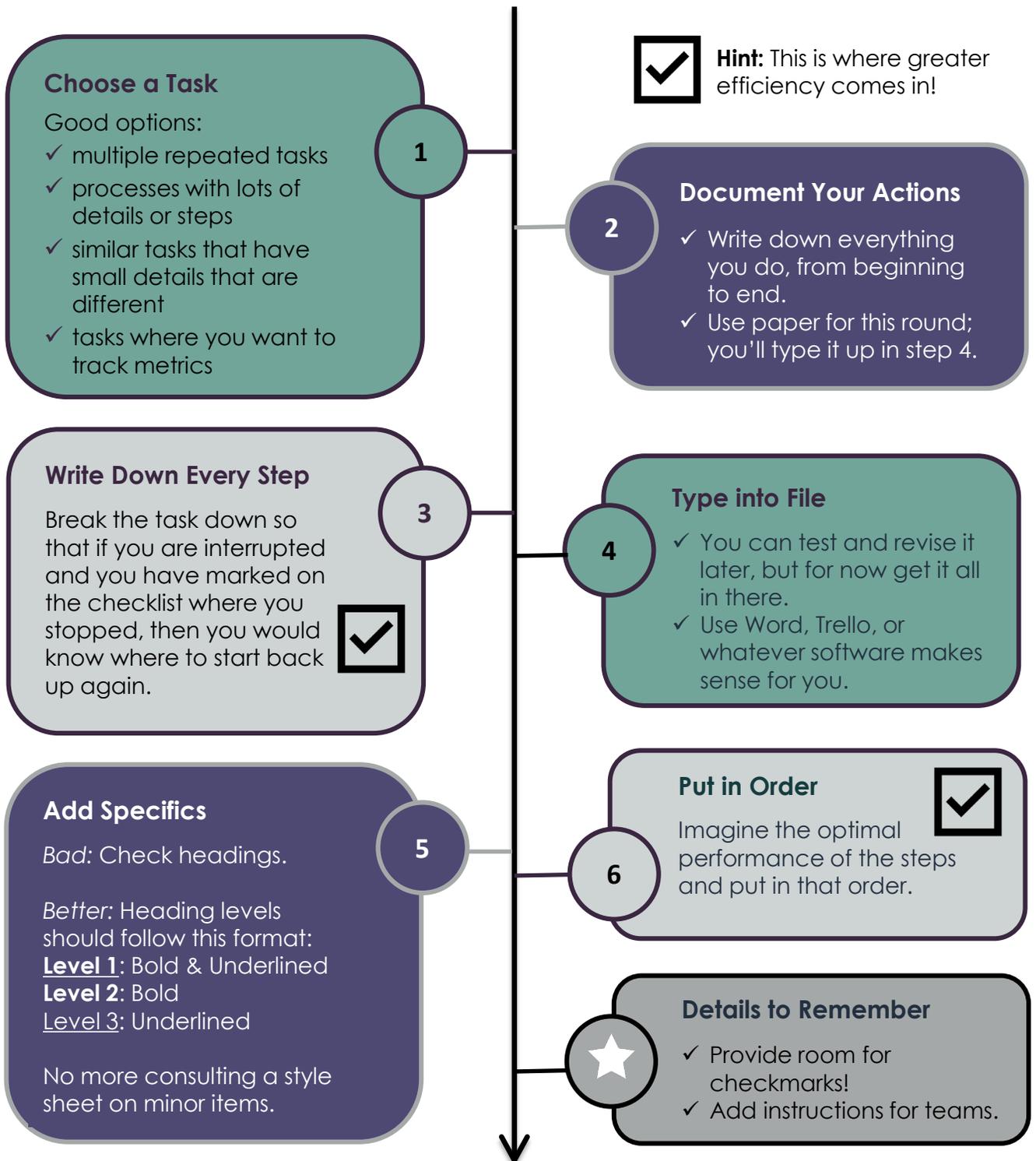# How to Create a Comprehensive Checklist

Creating and using a comprehensive checklist for a particular task can really help you be more efficient and consistent.

But a checklist is no good unless you use it! Being able to check off items you have completed lets you know where you left off when you have been interrupted or you go off on a tangent.

Hint: This is where greater efficiency comes in!

1 — Choose a Task

Good options:
- ✓ multiple repeated tasks
- ✓ processes with lots of details or steps
- ✓ similar tasks that have small details that are different
- ✓ tasks where you want to track metrics

2 — Document Your Actions

- ✓ Write down everything you do, from beginning to end.
- ✓ Use paper for this round; you'll type it up in step 4.

3 — Write Down Every Step

Break the task down so that if you are interrupted and you have marked on the checklist where you stopped, then you would know where to start back up again.

4 — Type into File

- ✓ You can test and revise it later, but for now get it all in there.
- ✓ Use Word, Trello, or whatever software makes sense for you.

5 — Add Specifics

Bad: Check headings.

Better: Heading levels should follow this format:
<u>Level 1</u>: Bold & Underlined
Level 2: Bold
<u>Level 3</u>: Underlined

No more consulting a style sheet on minor items.

6 — Put in Order

Imagine the optimal performance of the steps and put in that order.

★ Details to Remember

- ✓ Provide room for checkmarks!
- ✓ Add instructions for teams.

Add Mechanics

✓ Steps for getting into systems
✓ Process-related items
✓ Spell Check

If processes change, or you hop between different systems, this is especially helpful.

7

Add Tracking Items

✓ Start and stop times
✓ Length of project
✓ Level of difficulty
✓ Product or topic

Keeping used checklists allows you to more easily remember what was going on with a particular task if asked about it later. And if you didn't have time to check everything on the checklist, you have documentation of what you did and didn't do.

8

Test, Revise, Test

Once you have a draft, test it out. Make notes of what didn't work and make those changes to the next version. Then do it all over again until it works really well.

☑

9

☑ **Hint:** This is where greater efficiency comes in!

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 do something but the checklist reminded you
✓ When you can confidently give an estimate because you have metrics in your checklists

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

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.

Contact: Kelly Schrank
Kelly@headbookworm.com http://headbookworm.com

BOOKWORM
editing services

Editor Checklist
Manuscript

Client: _____ **Project #** _____ **Additional Contact:** _____

Manuscript (long title): _____

Manuscript (short title): _____

Journal (name): _____ **Journal (abbreviation):** _____

Date Due: _____ **Pages:** _____

Time: _____ _____ _____ **Time:** _____ _____ _____ **Time:** _____ _____ _____
    START   STOP   SPENT   START   STOP   SPENT   START   STOP   SPENT

Time: _____ _____ _____ **Time:** _____ _____ _____ **Time:** _____ _____ _____
    START   STOP   SPENT   START   STOP   SPENT   START   STOP   SPENT

	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:
	Edit references • Look up each reference and correct • Edit according to journal's author instructions and *AMA Manual of Style*
	Edit supplementary materials
	Edit conflict of interest statement
	Edit Acknowledgements
	Check/Fix Abbreviations and Acronyms • Ensure that the composite words of abbreviations and acronyms are spelled out on first use in body text, followed by the abbreviation and/or acronym in parentheses. *Headings should have full version in most cases.*
	• Use abbreviations and acronyms only if the term is used $\geq$3 times in the document. **Note:** If using *Find* and *Replace* to help locate abbreviations and acronyms, look for both the spelled-out versions **and** the abbreviations. • Make sure that abbreviations and acronyms are used consistently within the manuscript.

	Notes from Journal's Author Instructions

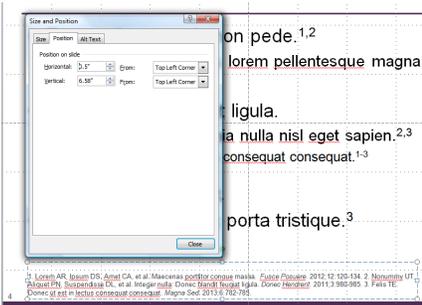|	**FINAL TOUCHES**
	Run Spell Check
	Run PerfectIt
	Turn off Track Changes
	Change View to 100% • Look over one more time in **All Markup** • Look over one more time in **No Markup**
	Save Document
	Email back to author in email subject line that matches naming convention

Editor Checklist
Dossier

Owner: _____   **Product:** _____   **Section:** _____

Date Received: _____   **Date Due:** _____   **# of Pages:** _____   **Date Completed:** _____

Time: _____   _____   _____   **Time:** _____   _____   _____   **Time:** _____   _____   _____
     START   STOP   SPENT   START   STOP   SPENT   START   STOP   SPENT

Time: _____   _____   _____   **Time:** _____   _____   _____   **Time:** _____   _____   _____
     START   STOP   SPENT   START   STOP   SPENT   START   STOP   SPENT

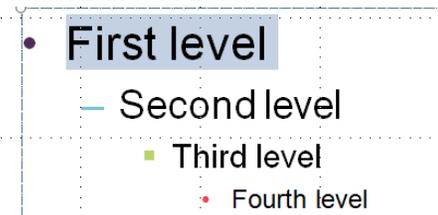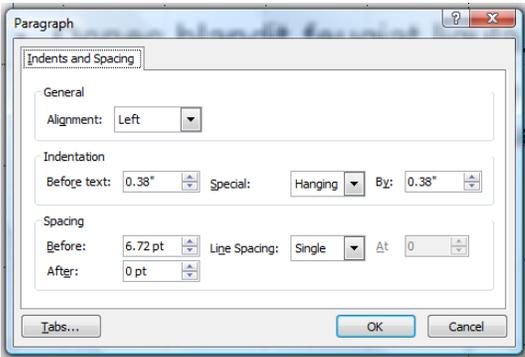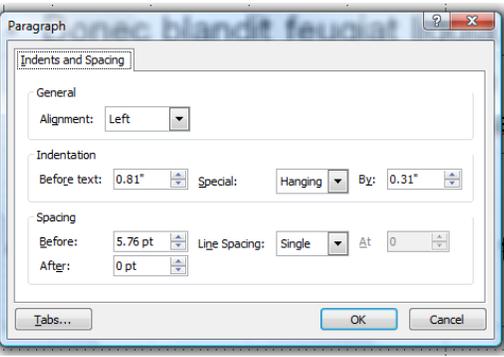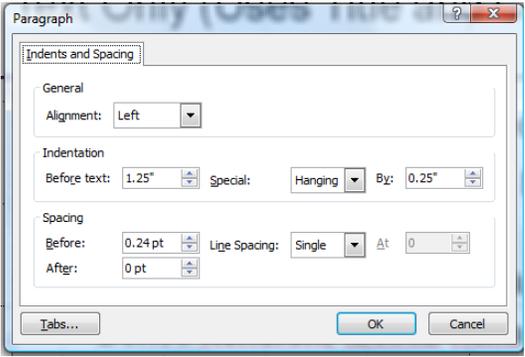|	
	Run PerfectIt
	FORMATTING
	Check Margins: 1" on top, bottom, left, and right
	Check Header and Footer: Right side of Header: X | Section or References or Abbreviations Left side of Footer: Product Name Dossier Right side of Footer: Page X of X
	Check for Keep with Next near headings and tables
	Check 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: 11 pt Calibri • Heading 1: 14 pt Calibri • Heading 2,3,4: 11 pt Calibri
	Check Justification • Check that body text, bullets, and references are left justified.
	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
	ABBREVIATIONS
	Check Abbreviations and Acronyms • Ensure that there are no periods in abbreviations (*Examples*: ie, US) (*Exception*: vs.). • Ensure abbreviations and acronyms are used consistently within the dossier. • Headings should have full version in most cases. • Abbreviations are included in a separate list; spell out on first mention in each section.

	TABLES/FIGURES
	Tables/Figures • Count tables and figures; tables and figures should be numbered consecutively with bold capital numerals. *Example:* **Table 2-1. Dosage Form, Strengths, Package Sizes, and NDCs**. • Provide links from table and figure references to the tables and figures. • Table and Figure titles: 11 pt Calibri; text within table: 10 pt Calibri; Footnotes: 9 pt Calibri. • Order: Abbreviations. Footnotes. Notes. • Ensure abbreviations are in this format: AE, adverse event; • Ensure footnotes are indicated with superscript lowercase letters in alphabetical order (a-z).
	Tables • Make sure units of measure are specified in column headings/sub-headings, not duplicated in cells. • Make sure text in header row and any shaded rows is bold and initial cap; however, text/data within the columns should be sentence case and not bold. • If a table is very long and has to break between 2 pages, ensure that header rows are repeated.
	STYLE
	Check Capitalization in Headings and Sub-Headings Capitalize: • Nouns, pronouns, verbs, adjectives, and adverbs, the first word after a colon, the first and last words • Prepositions of ≥ four letters (With, From, Into, Onto) Do NOT Capitalize: • Articles and coordinating conjunctions (and, or, but) • Prepositions of ≤ three letters (eg, in, on, for)
	Check Numbers • Search for numbers 1-10 to make sure numbers are used instead of words. • Numerals should be used to express numbers as opposed to spelling out numbers. • Numbers that begin a sentence should always be spelled out.
	Check Symbols and Signs • Ensure the appropriate use and format of symbols and signs within parentheses and in tables/figures. • Ensure that symbols and signs are spelled out in text, except for lab values (*Examples*: CK >10x ULN; HbA1c ≥6.5%; BMI ≥25 kg/m^2).
	Check Units of Measure • Ensure the appropriate format of units of measure.
	REFERENCES
	References in Text: Citations should be at the end of the sentence in Author-Date format. *Example:* Text (Name 2011).
	FINAL TOUCHES
	Run Spell Check
	Change View to 100% and Look it Over One More Time
	Clean up tracked formatting changes; leave only content edits
	Update Table of Contents
	Run PerfectIt
	Save Document

Editor Checklist
Slide Deck Conversion

Title: _____ **Due Date:** _____

Date: _____ **Time:** _____ _____ _____ **Time:** _____ _____ _____   **# of Pages:** _____

	START	STOP	SPENT		START	STOP	SPENT

☐	**Use this checklist for the following:** Converting a slide deck from an existing template to the new template
☐	**Open the Applicable Template**
☐	**Open Existing PowerPoint to be Converted:** In Normal View, click within the Slide tab. Press Ctrl-A, then right-click and select Copy.
☐	**Go to Template:** In Normal View, click within the Slide tab. Right-click and select Paste.
☐	**Save Working Version to Local Drive:** "[name they provided]_CONVERTED
☐	**Title Page:** Make sure it is the new title page
☐	**Content Master Page:** Add brand name Font should be 16 pt Arial (body), Roman
☐	**Delete Slide Masters from Existing PowerPoint**
☐	**Check for Correct Master Slides**
☐	**Look for Missing Text in Content, Tables, and Charts/Graphs**
☐	Pressing Ctrl-A on each slide often bring up most of the text, so you can then change color (works well in tables and text boxes, not as well in charts)
☐	White and light-colored text needs to be made black
☐	Eliminate Shadows and 3-D Effects on shapes and lines
☐	Compare against original if needed
☐	**Check Headings** They should be 30 pt Arial, left justified, black, Initial cap
☐	**Check Position of Text Boxes** Right-click>Size and Position>Position
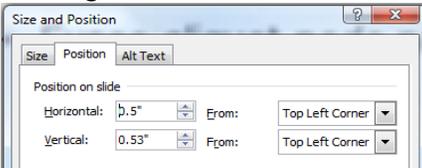
Heading text boxes:	Content text boxes, Smart Art, and Tables:
Size and Position — Position tab Position on slide Horizontal: 0.5" From: Top Left Corner Vertical: 0.53" From: Top Left Corner	Size and Position — Position tab Position on slide Horizontal: 0.5" From: Top Left Corner Vertical: 1.67" From: Top Left Corner
Check Position of Slide Numbers Very bottom left-hand corner, 10 pt, Roman Size and Position — Position tab Position on slide Horizontal: 0" From: Top Left Corner Vertical: 7.13" From: Top Left Corner	**Check Position of References text box** Size and Position — Position tab Position on slide Horizontal: 0.5" From: Top Left Corner Vertical: 6.58" From: Top Left Corner
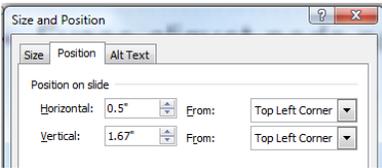
Check Bulleted Lists • First level – Second level ▪ Third level • Fourth level	First level, bullet: 28 pt, Dark Purple, Accent 1 Second level, en dash: 24 pt, Aqua Accent 2 Third level, square: 20 pt, Lime, Accent 3 Fourth level, bullet: 16 pt, Red, Accent 5

Check Spacing of Bulleted Lists

First Level:

Second Level:

Third Level:

Fourth Level:

Check Font and Size (where possible, follow these standards)
Text (not bullets): 28 pt, Arial (body), black
In tables: 18 pt, Arial (body), black
References: 10 pt, Arial (body), black

Check Endnotes
Make sure there is a space between the text and endnotes.
Make sure all asterisks are NOT superscript.

Check Coloring of Tables, Charts/Graphs, Smart Art

	Bar Graphs			
	Primary Color: Dark Purple, Accent 1	Secondary Color: Red, Accent 5	Tertiary Color: Aqua, Accent 2	Quaternary Color: Lime, Accent 3
	Line Charts			
	Primary Color: Dark Purple, Accent 1	Secondary Color: Red, Accent 5 Darker 25%	Tertiary Color: Aqua, Accent 2 Darker 25%	Quaternary Color: Lime, Accent 3 Darker 50%

	Make sure That Colors are Consistent Across Charts • Many times, graphs and charts and smart art do not consistently show our brand first or follow a particular order. Make sure you are using the color for a brand consistently.
	Smart Art: Look for the proper color scheme, but it can be in different combinations….
	Check text boxes for References and Abbreviations/Footnotes • References text box is provided in template. Text should be black 10 pt. • Abbreviations text box needs to be created. Text should be black 10 pt. • Place Abbreviations text box above References text box, lining up text. • Footnotes should be on top of Abbreviations text box (in same text box if needed, but footnotes should be first).
	Check text boxes for References and Abbreviations/Footnotes • Abbreviations should only be defined once in the slide deck, on slide with first mention. • "Definition" does not need to be in content; abbreviation only needs to be defined in Abbreviations text box. • Delete spaces around equal marks; use equal marks instead of commas. • Insert a line break in long URLs (shift-Enter).
	Check Slide Animation • Advance Slide>On Mouse Click

	Change View and Look it Over One More Time
	• Slide Show
	   o Check all links
	• Notes Page view
	   o Make sure there is NOT >1 text box for notes
	   o Adjust font size and text box size to make it fit on the page
	• Slide Sorter
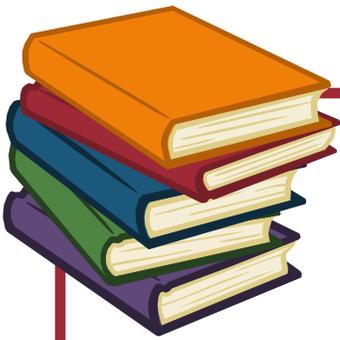
MARKETING MONDAY

A weekly plan to keep marketing my services on a regular basis

Week: _____

Email Marketing

Email current clients to check in

☐ _____   ☐ _____   ☐ _____
        Name   Name   Name

Notes:

Email prospects

☐ _____   ☐ _____   ☐ _____
        Name   Name   Name

Notes:

Email professional contacts for referrals, recommendations, or testimonials

☐ _____   ☐ _____   ☐ _____
        Name   Name   Name

Notes:

Social Media

	Mon	Tues	Wed	Thurs	Fri
Check LinkedIn and Twitter for things to like or share	☐	☐	☐	☐	☐
Post something to social media	☐	☐	☐	☐	☐
Post that I am available	☐	☐	☐	☐	☐

Networking

Email network to stay in touch

☐ _____   ☐ _____   ☐ _____
        Name   Name   Name

Notes:

Calls with Network

☐ _____   _____   _____
        Name   Date   Place

LinkedIn

☐ Go through notifications of recent job moves and follow up with folks

☐ _____ ☐ _____ ☐ _____
         Name   Name   Name

Notes:

☐ Post to website:
☐
☐

☐ Go through electronic files for TO DOs

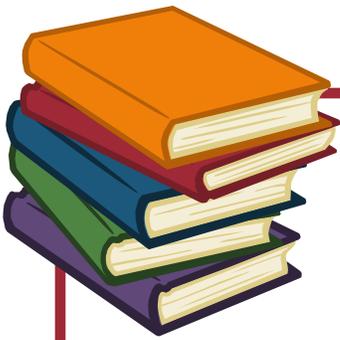## Check Job Lists

☐ Check AMWA job list

☐ Check STC job list

☐ Check EFA job list

☐ Check CSE job list

☐ Respond to ProFinder requests

☐ Check LinkedIn jobs

FINANCIAL FRIDAY CHECKLIST

Tasks to keep finances top of mind

Date: _____

Check Bank Account

☐ Balance – Checking   _____

☐ Balance – Savings   _____

☐ Balance – Credit Card   _____

☐ Other bills coming up? $_____ for _____

                                           $_____ for _____

☐ Reimbursements coming up? $_____ for _____

Check up on Invoices

		Current	Unpaid Invoice(s)	Need to Invoice
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				

Prep for Taxes

Other Financial Notes

Week: _____

Thursday Post

	Put together Blog Post + Post • Text for blog post • Text for LinkedIn • Image • Hashtags

	Gather Metrics
	• Grab screenshot of Dashboard of company page
	    ○ Put in spreadsheet
	    ○ Input date and "Before Post"
	• Grab screenshot of stats of last post
	    ○ Put in spreadsheet
	    ○ Input date of post (*Ex:* 2/18/19 Post)
	    ○ Input date of stats (*Ex:* 2/22/19 Stats)

	Publish Blog Post + Post • Text for blog post • Text for LinkedIn • Image • Hashtags • Add CTA with phone number and link to contact form

Time: _____ _____ _____ **Time: _____ _____ _____** **Time: _____ _____ _____**

    START   STOP   SPENT   START   STOP   SPENT   START   STOP   SPENT

	Plan for Coming Weeks	
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**
	Date	**Topic**

Other Upcoming Topics: