

To be More Efficient and Consistent, Build a Better Checklist

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- Technical editor and writer for over 20 years in variety of industries
- Medical editor for 10 years in pharmaceutical industry
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 - Consistency, Structure, and Clarity
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 - Technical writing – SOPS in IT, cybersecurity
 - Medical editing – dossiers, slide decks, manuscripts

Checklist Specialist

- ✓ Presented as a webinar as part of the STC Conduit UnConference in April 2021
- ✓ Presented as a webinar for Technical Editing CoP in December 2020
- ✓ Presented as a webinar for Chicago chapter in November 2020
- ✓ Facilitated as a virtual roundtable for AMWA Annual Conference in October 2020
- ✓ Facilitated a virtual workshop for AIIP in June 2020
- ✓ Presented as a webinar as part of the STC South Central Texas Mini-conference in April 2020.
- ✓ Facilitated a virtual roundtable as part of the AMWA Southwest Chapter Virtual Roundtables and Annual Meeting
- ✓ 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)

Agenda

Introduction

How do you get started?

How do you know you have good checklists?

Summary

Resources

Questions? Testimonials?

Contact

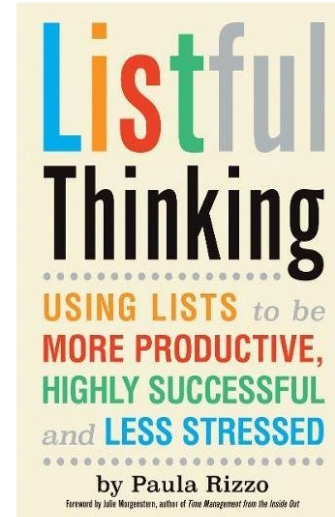
The Checklist Manifesto by Atul Gawande

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



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

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. 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, Revise, Test, Revise
10. 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. Document your actions

3. Write down every step

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

4. Type every little thing into a file

Don't edit yourself too quickly

Do create boxes for checkmarks

5. 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> SECTIONS (Ex: SUMMARY; CLINICAL STUDY/CLINICAL STUDIES)
	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
	<i>Heading Level 4</i> <u>Topic</u> —- Text follows after; it's not on its own line

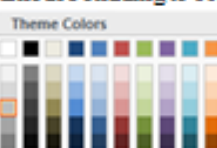
Check Table Formatting

- 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.

5. 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

6. 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	<ul style="list-style-type: none"> • Body Text: 10 pt Times New Roman • Headings: 12 pt Times New Roman
Check Justification	<ul style="list-style-type: none"> • Check that body text, bullets, and references are left justified.
Check Spacing	<ul style="list-style-type: none"> • 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

7. 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”

Editor Checklist
Standard Responses – Combined Full and Quick Edit

	FINAL TOUCHES
	Run Spell Check
	Update Fields for Cross-references
	Change View to 100% and Look Over SR One More Time <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Indicate what was done to the SR in the Description box (<i>Example:</i> Standard edit/tracked).
	<p>Check General Properties</p> <ul style="list-style-type: none"> • Check that the following fields are populated: Type, Subtype, Classification • Name: Make sure the name matches the SR name <i>exactly</i> 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 (<i>Example:</i> 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: <ul style="list-style-type: none"> ○ Country/Area ○ Language ○ Intended Use ○ Approved for Distribution ○ Legal Hold (query author if not populated) ○ Off Label (query author if not populated) • Parent Name (global SRs only): Make sure this field matches the SR name <i>exactly</i>.
	<p>Check Rendition in Viewer</p> <ul style="list-style-type: none"> • 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 complicated, work with author to fix them.
	<p>Complete the Task</p> <ul style="list-style-type: none"> • Click Complete. <ul style="list-style-type: none"> ○ Click Approved if the instructions were to edit and activate and you have no questions. ○ Click Approved if the instructions were to edit and track changes and other reviewers are included in the review cycle. ○ Click Not Approved if the instructions were to edit and track changes and other reviewers are not included in the review/approval cycle. ○ Click Not Approved if the instructions were to edit and activate but you have questions. <ul style="list-style-type: none"> • Leave a comment at the bottom of the document. • Email the author. • Check expiration date. • Click Complete.
	Find and Replace / Fixes / Great Catch!

Template:

		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		

8. 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: _____ Date Completed: _____ Entered in Tracker: _____
START STOP SPENT

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: _____ Entered in Spreadsheet: _____
START STOP SPENT

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 ☒	☒

9. Test
Revise
Test
Revise
10. 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

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.

Questions? Testimonials?

- Do you have any questions?



- What can you add to your toolbox?



Thank you for attending!

Feel free to contact me with questions:



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