

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.

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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



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Hint: This is where greater efficiency comes in!

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.

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.



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.

Add Specifics

Bad: Check headings.

Better: Heading levels should follow this format: **Level 1**: Bold & Underlined

Level 2: Bold <u>Level 3</u>: Underlined

No more consulting a style sheet on minor items.



Put in Order

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



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Details to Remember

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

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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.

Test, Revise, Test, Revise

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.

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

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 know what you did and didn't do.



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Hint: This is where greater efficiency comes in!

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:

✓ Franzen Alexandra. The Checklist Book: Set Realistic Goals, Celebrate Tiny Wins, Reduce Stress and Overwhelm, and Feel Calmer Every Day. TMA Press; 2020.

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- ✓ 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. https://cdn.ymaws.com/www.amwa.org/resource/resmgr/journal/lssues/2013/2013v28n4_online.pdf
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Checklist Examples:

