

# AMWA Breakfast Roundtable Using Checklists for More Efficient Editing

Kelly Schrank, MED Communications  
[kelly.schrank@medcomminc.com](mailto:kelly.schrank@medcomminc.com)

## Who Uses Checklists?

### Other Industries/Professions

Checklists have long been used in aviation to ensure that pilots and others follow proper procedures.

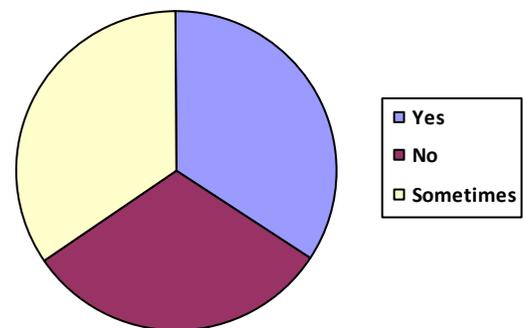
Who else uses checklists?<sup>a</sup>

- Health Care Providers (ICU Central Line Checklist; Surgical Safety Checklist)
- Builders (construction schedules, communication schedules)
- Chefs (recipes, yes, even fine dining)
- Investors (checklist of things to look for in potential investments, broken out by day in the investigation process)

### Editors

One hundred seventy-six members of two email lists<sup>b</sup> responded to my survey on editing checklists.

Do You Use Editing Checklists?

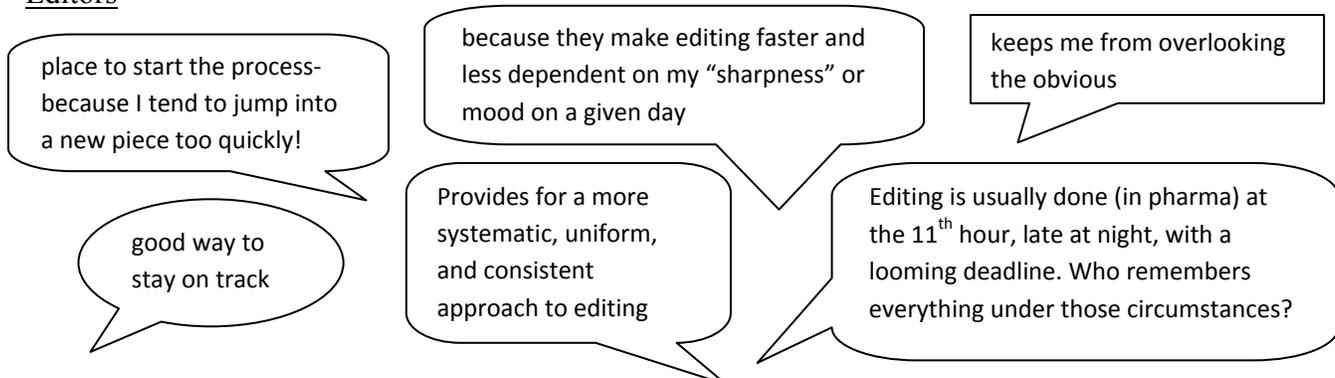


## Why Do They Use Checklists?

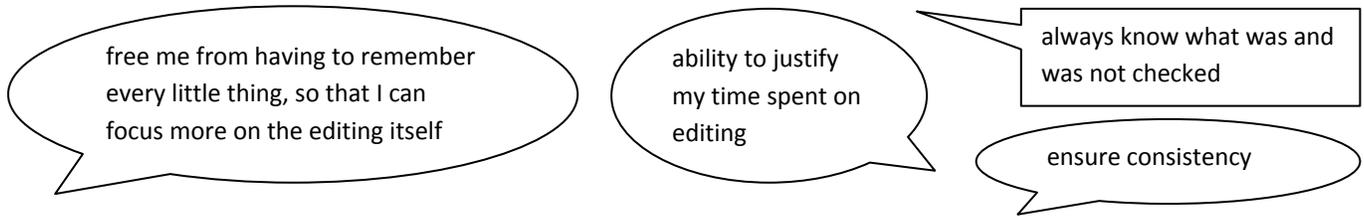
### Other Industries/Professions

- Aviation: it's a requirement, part of training, part of their job
- Health Care Providers: patient safety
- Builders: too many details to leave anything to chance
- Chefs: consistency and quality, night after night
- Investors: more efficient and more confident in decisions

### Editors



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### How do you Make a Good Checklist?<sup>a</sup>

- “keep it between five and nine items...”
- “the wording should be simple and exact...and use the familiar language of the profession”
- “ideally, it should fit on one page”
- “it should be free of clutter and unnecessary colors”
- “a checklist has to be tested in the real world”

### How Can you be More Efficient With a Good Editing Checklist?

- Create an editing checklist that leads you through your editing process with a particular type of document.
- Specify in your editing checklist what to look for in that document:
  - NOT: check that the heading levels are correct.
  - BUT: Heading levels should be as follows:
    - Level 1: Bold
    - Level 2: Italics
    - Level 3: Underlined
- Use the editing checklist to document your process, timing, difficulty, level of edit...whatever you need to document or track.
- Test your editing checklist and tweak it until it flows and feels like an integral part of your process.
- Adapt your editing checklist as your needs changes.

### How do you Know When You Have a Good Editing Checklist?

- When you start a new project without a checklist and you feel lost!
- When you find an error that the checklist told you look for.
- When you feel like your edits are consistently more thorough, and faster, and you are confident that you have done all you can in the time allotted and that you have documented what you have done.

### References:

<sup>a</sup> Gawande, Atul. *The Checklist Manifesto: How to Get Things Right*. New York: Henry Holt & Company, 2010.

<sup>b</sup> The AMWA Writing/Editing email list and the Society for Technical Communication’s Technical Editing Special Interest Group email list