How to Create an Editing Checklist

Creating and using an editing checklist for a particular type of document can really help you (and your team) 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’ve been interrupted or you go off on a tangent.

1. Start with a Type of Document You Edit Often
   This will allow you to make it very specific to the needs of that type of document.

2. Document Your Actions
   Write down everything you do, from beginning to end.

3. Add Specifics / Show and Tell
   - Bad: Check headings.
   - Better: Heading levels should follow this format:
     Level 1: Bold & Underlined
     Level 2: Bold
     Level 3: Underlined
   
   No more consulting a style sheet on minor items.

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

5. Start BIG
   Check items that give you a big picture view of the document:
   - Titles, headers, and footers
   - Heading levels
   - Table and figure numbering
   - Layout
   
   Most don’t have the luxury of multiple passes, but you may catch some errors as you scan for these items.

6. Go Smaller
   - Find and replace for common issues with terminology, jargon, and abbreviations.
   - Look at formatting items, like punctuation, symbols, and capitalization.

Details to Remember
   - Provide a place for checkmarks!
   - Add instructions for teams.

Hint: This is where greater efficiency comes in!

Continue on back!
**Add Mechanics**

- Steps for getting into systems
- Process-related items
- Spell Check
- Updating TOCs

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

**Test, Revise, Test**

Once you have a draft, test it out on your next document. 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.

**Add Tracking Items**

- Start and stop times
- Length of document
- Level of edit provides
- Level of difficulty
- Author or team
- Product or topic

Keeping the 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.

**How do you Know Your Checklist Works?**

- When you find an error because the checklist told you to look for it.
- When you start a new type of document and feel a little lost without a checklist.
- When you feel your edits are consistently more thorough and faster, and you are confident you have done all you can in the time allotted.

**Do Editors Use Checklists?**

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Yes</td>
<td>34.10%</td>
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<tr>
<td>Sometimes</td>
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<tr>
<td>No</td>
<td>31.30%</td>
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</tbody>
</table>

**2016 STC Summit Progression:**
*Using Checklists for More Efficient Editing*
@STC_Summit #stc16

**Sources Mentioned in Progression:**

**Sources:**
*176 members of the AMWA Writing/Editing email list and the Society for Technical Communication’s Technical Editing Special Interest Group email list took a survey in October 2011.*