The (Editing) Checklist Manifesto

Using Checklists to Foolproof Your Editing

*Samantha Enslen, Dragonfly Editorial*

Thursday, March 26, 2015
How often do you edit perfectly?

1. Always!

2. Sometimes things fall through the cracks.

3. A lot falls through the cracks ... a lot of the time.
The complexity is overwhelming
Just to be an editor …
What to do?

- Get more training?
- Just try harder?
- Hang kitty posters?
Checklists can help
Powerful results
Wow.

10% → 0
Powerful results
Wow.

60% drop in 3 months. Outperformed 90% of ICUs nationwide.
Today

- Editing checklists
- Client checklists
- Personal checklists and micro-checklists
- Intake checklists
- Proofreading checklists
- Good vs. bad checklists
- Next steps
Questions or comments?
What does a copy editor do?

“What copy editor: a person whose job is to prepare a book, newspaper, etc., for printing by making sure the words are correct.”

— Merriam-Webster’s Collegiate Dictionary, 11th edition
Standard Editorial Process

Step 1: Housekeeping
- Do a Save As and rename file, adding your initials before the filename: “edited SE_filename”
- Replace:
  - two spaces → one space
  - quote → curly quote
  - apostrophe → curly apostrophe
  - en dash → em dash (as appropriate)
  - double hyphen → en or em (as appropriate)
  - spaces around en, ems, and slashes → no spaces
  - e.g. and i.e. → e.g., and i.e.,
  - .. → and ..., or, → or,

Step 2: Copyediting
- Set view to Final (in Word 2013, No Markup)
- Run spellcheck
- Make your first copyediting pass (see page 2)
- Record any queries using Comments
- Make a second quick pass, looking for errors that were missed or accidentally introduced
- Review your Comments; remove or resolve any you can

Step 3: Finishing up
- Turn off Track Changes
- Run a final replace of two spaces → one space
- Run a final spellcheck
Copyedit

- Fix mechanical problems
  - Fix spelling, grammar, and punctuation
  - Ensure consistent style (e.g., capitalization, hyphenation, and numbers)
  - Ensure correct syntax and usage
  - Query inconsistencies, factual errors, gaps in logic, organizational problems, and redundancies
  - Query sexist/biased language and inappropriate tone
  - Confirm URLs, phone numbers, email addresses, and the like
  - Verify cross-references

- If there is time, or the project allows:
  - Enhance readability by reducing jargon, breaking up overly long sentences/paragraphs, and adding heads/subheads as needed
  - Enhance clarity by rewording awkward, convoluted, confusing, or imprecise text
  - Enhance conciseness by reducing wordiness and overuse of passive voice
Horizontal QA

- Check exhibits
  - Correct titles and punctuation
  - Correct, consecutive numbering
  - Callouts for all exhibits, correctly numbered

- Reconcile acronyms
  - Spell out acronyms at first reference
  - Delete acronyms used only once

- Fix bulleted lists
  - Parallel construction
  - Correct end punctuation for intro sentence
  - Correct punctuation for bulleted items

- Fix bibliographic matter
  - Consistency of reference list with given style
  - Consistency of in-text citations with given style
  - Agreement between citations and reference list

- Fix table of contents
  - Correct entries
  - Correct page numbers

- Ensure correct, consistent formatting
  - Headers and footers
  - Page numbering and section numbering
Customer-specific checklists

- Unique to that client
- Super important to that client
- Different from your normal editorial style (i.e., whatever you’re used to)
- Dorky, weird, or annoying
- Easy to forget
Customer-specific checklists

Customer 1

- ABC → Alpha Bravo Charlie
- DOD → DoD
- % → percent
- federal government → Federal Government
- U.S. → United States (n)

Customer 2

- Delta Echo Foxtrot → DEF
- DoD → DOD
- percent → %
- Federal Government → federal government
- United States → US
“Check italics”

- itals for reference callouts, but not parentheses (3, 4–9, 15)
- itals for single-letter variables ($x + 3$); Roman for variables denoted by two or more letters ($xy + 3$)
- itals for run-in lists, such as ($a$) dogs and ($b$) cats
- itals for parts of a figure, e.g., Figure 2a
- no itals for emphasis
“Check figures and tables”

- Set Table Titles Like This
- Set Figure titles like this.
- All caps for heads and spanner heads; only cap first word in stub headings
- Put notes for tables in this order: NOTE, footnote in superscript itals, SOURCE
- Pull notes from figures into captions or text
Read me files

- A set of reminders, rather than “to dos”
Bain

Who are they?
One of the world’s leading management consulting firms, Bain helps companies make important decisions on strategy, operations, technology, organization, private equity, and mergers & acquisitions.

They’re based in Boston, and we’ve worked with them since 2014.

What do we do for them
We help Bain create briefs, white papers, reports, and op-ed pieces. We sometimes handle end-to-end management of an entire piece, including:

Critical resources
- Bain Style Guide
- Bain sample copyedit
- Bain sample fact check

What to know before you get started
- For Bain editing projects, we do a “copyedit plus.” That means we first edit for the basics — spelling, grammar, punctuation, usage, and style consistency. Bain asks us to follow their style meticulously, so no inconsistencies, please.
- Second, we edit Bain materials with a careful eye for readability, clarity, logic, and flow. Examine every sentence to ensure that it’s as clearly written as possible, that there’s no jargon, and that they’re no unnecessary passive voice or wordiness. Change what you can and query anything you’re uncertain about.

Critical style points / reminders
- no serial comma—unless needed for clarity
- use % sign always
- Alphabetize list of authors in byline—but allow a senior partner to remain first, if listed that way
- Heads and subheads: Make full sentences, set in sentence case, no end punctuation
Personal checklists

List your personal bugaboos:

- Things you always forget
- Things that are “wrong” for a particular client, but that don’t look wrong to you
- Things you hate to do
- Things you resent doing
- Things that would be disastrous if you forgot
Personal checklists

- additionally → in addition
- over → more than
- data → plural
- (ACROs) → (ACRO)
- Send timesheet at end of each day!
Intake checklists

A reminder of all the questions you need to have answered before you can start a project

- Project scope
- Project schedule
- Default style and style information
- Estimate required?
☐ Schedule
  o When due in? When due back?
  o Will text come in all at once, or on a rolling basis?
☐ Scope
  o Page count? Font size and type?
  o Single- or double-spaced?
☐ Level of edit
  o Basic copyedit? Proofread? Substantive edit?
☐ Style
  o Is there a default style guide, house guide, or proposal-specific style sheet?
  o Are there other terminology preferences we should know about?
☐ Planning
  o Can we get an outline of the document, with a breakdown of page count per section?
  o Can we see draft copy, so that we can prepare a style sheet?
☐ Desktop publishing
  o Will this go through DTP?
  o If so, before or after we edit?
☐ Other specs
  o Are there page limitations?
  o Should we create an acronym list?
Micro-checklists

For tasks that:

- Stress you out
- You don’t do often and flail around to remember how
- Are critically important
- Are onerous and require multiple steps
- Open “part 1” file
  - Note last page number and last section number
  - Turn off Track Changes
  - Place cursor at end of edited section
  - CNTRL+SHIFT+END
  - Delete
  - Save and close

- Open “part 2” file
  - Turn off Track Changes
  - Place cursor at beginning of edited section
  - CNTRL+SHIFT+HOME
  - Delete
  - Save and close

- Open “part 1” file
  - Save As, rename file
  - Place cursor at end of edited section
  - Insert > Object > Text from File, select file, Insert
  - Check end page number and last section number
  - Regenerate TOC
  - Save and close
Proofreading checklists

For publications that have already been designed:

- Scour each page of the publication
- Look for distinct elements
- Look for repeating elements
- List each item that must be checked
IN STYLE

Hyphenation Madness
by Paul R. Martin

"If you take hyphens seriously, you will surely go mad," instruments aloud Hyphenation Diviner, attributed to John Boardman in Punctuation or Proofread? Biblical. It is, after all, better to be as wise as a hyphen or hyphenate.

"Side to Side," Institute of Tone, Goldstein observed in the previous terms where hyphenated terms like orange, blue, and green are more comfortable, the Associated Press now requires a long-standing trend away from hyphenation.

Compound modifiers are a more serious matter—and they're not in serious trouble. I hereby suggest alternative terms and other options, including dropping hyphenation into compound modifiers. I should note that in a column in 1999 and a subsequent book, William Safire of the New York Times dubbed me "the Great Hyphenator" at the Wall Street Journal. But I had taken issue with the consistency in hyphenating, say, new but not well-explained in a column.

So we're seeing the same thing here along with "new-a style, which seems to hyphenate in cases like health care legislation and now for "I'll" when the meaning is clear without them." Maddening, right?

No one writes or reads such arguments, nor consistency and expediency are best served, I remain, by always using the hyphen—or instead of pondering any similarity without it. To me, it's health care legislation. Despite the many companies using Healthcare in their names nowadays.

Which of these terms do you think should have hyphens: mutual fund manager, fast food chain, drug price increase, national gas pipeline, mail order agent, or high school student? My answer is all of the above, although many stylebooks call for dropping the hyphen in communicating expressions like the former two examples.

"Follow your publishing style, of course, but consistency is key, and so is, when it comes to often-used hyphenation rules."

INSIDE JOKES
by Sage Stossel

WHEN WEB-SAVY EDITORS REPRODUCE

Sure, John James is a nice, solid name. But it's not exactly search-engine optimized, is it?
For each story:
  o Drop cap to start story
  o Square end sign to close story
  o Dotted line after title
  o Bylines in italics, with “by” in lowercase
  o Indent all paras
  o Links in boldface orange
  o Links all live and correct

Footer:
  o WWW.COPYEDITING.COM — in blue
  o Copyediting | Month–Month 2014
  o page number

Etc.
  o Etc.
  o Etc.
Questions?
What works and what doesn’t

- Keep it brief
- Focus on the killer items—“the steps that are most dangerous to skip and sometimes overlooked nonetheless”
- Use simple, precise words
- Fit to one page
- Keep clutter-free—no colors, highlights, text boxes, etc.
- Use uppercase and lowercase text
Plus, you must ...

- Test it in real-life settings
- Repeat until it works consistently
Tracking Time from the Project “Time” View

If you want to record time for a single project, go to the “Time” view.

- Start by signing in. This will bring you to the Dashboard where you’ll see recent activity in all projects you’re assigned to.
- Choose a project from the list.
- From the project navigation area, select the “Time” page (with words in gray text), click on “Time.”
- From the “Time” page, click on “Log Time” on the subpage that says “Log Time.”
- In the window that pops up, enter the date, time spent, and a description of the work done. Make sure to select the correct task list and task from the drop-down menus.
- When you’re finished, click the green button that says “Log this time.” Your time entry should then be added to the list of all time entries for the project.
How to enter your time in Teamwork

- Go to your project
- Mouse over your task and click the stopwatch icon
- Choose date, start time, and time spent
- Click Log this time
Good checklists

- Don’t try to spell out everything
- Precise
- Practical
Bad checklists

- Treat people like they’re dumb and try to spell out every single step
- Long, hard to use, impractical
- Vague and imprecise
- Turn peoples’ brains off rather than turning them on
Questions?

- We can talk about automation tools?
- Or just talk generally about checklists?
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184,299 Epic Teams All Around the World Manage 1,811,185 Projects with Teamwork.com
### Your projects

#### ACS (American Chemical Society)
- ACS client essentials — updated: Thursday Feb 5th 2015

#### APMP
- APMP Certification Day (SE) — updated: Thursday Feb 12th 2015 — due date: Tuesday Apr 14th 2015
- APMP Checklists Presentation — updated: Monday Feb 23rd 2015
- Gold Quill Awards entry — updated: Monday Feb 9th 2015

#### Ace Info Solutions
- ACEinfo Client Essentials — updated: Wednesday Feb 18th 2015
- ACE Info IPA Brownfields—Date Due code TBD (MA).pdf — updated: Friday Jan 30th 2015
- ACEinfo NOAA 4073-006 (MN, mo, job) — updated: Monday Feb 23rd 2015 — due date: Sunday Feb 22nd 2015

#### American Diabetes Association (ADA)
- ADA Type 1 Where Do I Begin — updated: Tuesday Dec 30th 2014

#### Bain & Company
- Bain client essentials — updated: Thursday Feb 5th 2015
- Bain India Philanthropy (AIMC/Health mvc) — updated: Friday Feb 20th 2015 — due date: Thursday Mar 12th 2015
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Step 2: Copyediting

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  - Run spellcheck
  - First copy editing pass (see page 2)
  - Check风格Comments
    - for errors that were missed initially introduced
Final questions?
Next steps

- Look through these checklists
- Adapt them for your processes
- Try them out
- Rework them and try ‘em again
- Automate ‘em
To learn more
Thanks! Write me!

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