



The (Editing) Checklist Manifesto

Using Checklists to
Foolproof Your Editing

Samantha Enslen, Dragonfly Editorial

Thursday, March 26, 2015

How often do you edit perfectly?

© 2015 | page 2

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

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Just to be an editor ...

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THE NEW YORK TIMES BESTSELLER

THE **CHECKLIST** MANIFESTO

HOW TO GET THINGS RIGHT

PICADOR

ATUL GAWANDE

BESTSELLING AUTHOR OF *BETTER* AND *COMPLICATIONS*

What to do?

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- Get more training?
- Just try harder?
- Hang kitty posters?



Checklists can help

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Powerful results

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Wow.

10% → 0

Powerful results

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Wow.

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

Today

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- Editing checklists
- Client checklists
- Personal checklists and micro-checklists
- Intake checklists
- Proofreading checklists
- Good vs. bad checklists
- Next steps

Questions or comments?

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What does a copy editor do?

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“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 ens, 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

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- 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

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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”

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

“Check figures and tables”

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- 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

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- 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

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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

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

Intake checklists

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

EDITOR'S LETTER

The Science of Writing Style
by Erin Brenner

Copyediting is an art and a science. The science—rules like the subject and verb must agree—are relatively easy to teach and understand, even if the actual application is more complex. The art, of course, is harder to define.

A writer's style is often lumped into the art of writing and editing. Style is unique to each author—how they communicate their message and their attitude about it. Writing style seems so mystical in writing books.

Perhaps developing a style is vague (Just keep writing!), but defining a style doesn't have to be. When you look closely at the writing, you can see the patterns. A good start involves examining the words themselves, how those words are organized into sentences, and how those sentences are organized into paragraphs, and that's what we'll do in the In Depth column.

While you're thinking about writing style, consider whether it's your author's wont to use the word *curate* in its modern sense, to sprinkle regional words throughout the text, or to eschew hyphens as much as grammatically possible. This issue contains thoughts on all these topics, plus information on professional organizations and HTML.

As always, we're interested in what you think. After you've read the issue, **drop me a line** and share your thoughts. Maybe we'll publish your letter in the future! ■

CONTACT US

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IN STYLE

Hyphenation Madness by Paul R. Martin

If you take hyphens seriously, you will surely go mad." Commentaries about hyphens often observe, attributed to John Benbow in *Manuscript and Proof*. Indeed, if we've been a stylebook or style-manual editor long enough, you may be as mad as a hatter over hyphens.

Fellow In Style columnist Norm Goldstein noted in the **previous issue** that once-hyphenated words like *onstage*, *film-maker*, and *the larger* are now solidified in the *Associated Press Stylebook*, continuing a long-standing trend away from hyphens.

Compound modifiers are a more serious matter—or are they a more-serious matter? I hereby suggest the *more-serious* approach and advocate inserting AP's dropped hyphens into compound modifiers.

I should note that in a column in 1993 and a subsequent book, William Safire of the *New York Times* dubbed me "the Great Hyphenator" at the *Wall Street Journal* because I had taken issue with his inconsistency in hyphenating *kitchen-table issue* but not *health care legislation* in a column.

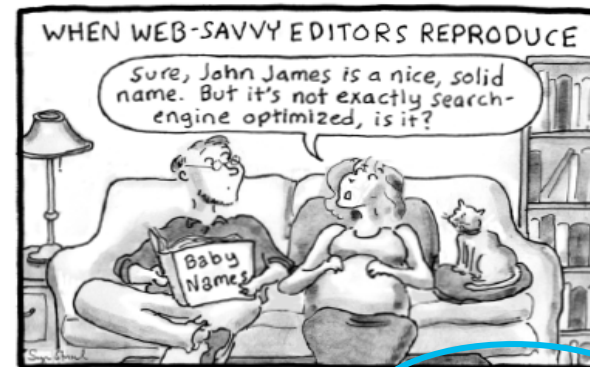
Safire countered that he went along with *Times* style, which omits the hyphen in cases like *health care legislation* and *sales tax bill* "when the meaning is clear without them." Maddening, right?

No one wins or loses such arguments, but consistency and expediency are best served, I contend, by always using the hyphen—instead of pondering any ambiguity 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 increases*, *natural gas pipeline*, *real estate agent*, or *high school student*? My answer is all of the above, although many stylebooks call for dropping the hyphens in commonplace expressions like the final two examples.

Follow your publication's style, of course, but consistency isn't foolish when it comes to often-hazy hyphenation rules. ■

INSIDE JOKE by Sage Stossel



- ❑ For each story:
 - Drop cap to start story
 - Square end sign to close story
 - Dotted line after title
 - Bylines in italics, with “by” in lowercase
 - Indent all paras
 - Links in boldface orange
 - Links all live and correct
- ❑ Footer:
 - WWW.COPYEDITING.COM — in blue
 - Copyediting | Month–Month 2014
 - page number
- ❑ Etc.
 - Etc.
 - Etc.

Questions?

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What works and what doesn't

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- 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 ...

© 2015 | page 36

- Test it in real-life settings
- Repeat until it works consistently

+ 33%

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 bar on the left side of the page (with words in gray text), click on "Time."
- From the "Time" page, click the green button that says "Log Time."
- In the window that pops up, enter the time you spent, and a description of the task.
- Alternately, from the "Task List" page, click the task which you're assigned. Click the "Log Time" button from the drop-down menu.
- 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

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- Don't try to spell out everything
- Precise
- Practical

Bad checklists

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- 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?

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- We can talk about automation tools?
- Or just talk generally about checklists?

cdn2.hubspot.net/hub/53 x roadtrip.unbounce.com/? x APMP BOK x Teamwork.com - Online F x You


https://www.teamwork.com

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184,299 Epic Teams All Around the World Manage 1,811,185 Projects with Teamwork.com

aces-logo-09.gif

Got Questions? Talk to us live... Show all downloads...

★ ACES Tracking Changes, Winter 2015

Dragonfly Editorial

editorial
dragonfly[^]

OVERVIEW TASKS MESSAGES FILES TIME NOTEBOOKS LINKS BILLING PEOPLE

Filter by user

All users

Task lists

Final production

8

Closeout and billing

3

Reports

Task lists report

Gantt chart export...

Gantt chart

Final production

- ☐ Samantha E. Lead editor / manager
- ☐ Mary D. Writer ⌚
- ☐ Mary D. Copyediting ⌚
- ☐ Lexy N. Design and layout ⌚
- ☐ Mary D. First proofread ⌚
- ☐ Anna B. Final proofread ⌚
- ☐ Samantha E. Send out journal to all members
- ☐ Samantha E. Post journal on ACES.org website

[+ Add a task](#)

Closeout and billing

- ☐ Samantha E. Close out project for Shaneh 🗑
- ☒ Shaneh W. Run billing [more...](#) 🗑
- ☒ Shaneh W. Archive project

[+ Add a task](#)

★ ACES Tracking Changes, Winter 2015

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Filter by user

All users

Task lists

Final production

5

Closeout and billing

3

Reports

Task lists report

Gantt chart export...

Gantt chart

OVERVIEW **TASKS** MESSAGES FILES TIME NOTEBOOKS LINKS BILLING PEOPLE

Final production

- ☒ Samantha E. Lead editor/manager
- ☒ Mary D. Writer ⌚
- ☒ Mary D. Copyediting ⌚
- ☐ Levy N. Design and layout ⌚
- ☐ Mary D. First proofread ⌚
- ☐ Anna B. Final proofread ⌚
- ☐ Samantha E. Send out journal to all members
- ☐ Samantha E. Post journal on ACES.org website

[+ Add a task](#) [3 completed](#)

Closeout and billing

- ☐ Samantha E. Close out project for Shaneh
- ☒ Shaneh W. Run billing [more...](#)
- ☒ Shaneh W. Archive project

[+ Add a task](#)



Filter by user

All users

Task lists

No active lists

Reports

Task lists report

Gantt chart export...

Gantt chart

OVERVIEW

TASKS

MESSAGES

FILES

TIME

NOTES

New task list



Give the list a name (e.g. "Changes to layout" or "Bug fixes / typos")

Notes

Privacy

Milestone

Advanced

Do you have any notes for this list? Enter them here:

[Add this task list](#) or [Cancel](#)[Create the first task list](#)



Filter by user

All users

Task lists

No active lists

Reports

Task lists report

Gantt chart export...

Gantt chart

New task list

Give the list a name (eg. "Changes to layout" or "Bug fixes / typos")

Notes Privacy Milestone Advanced

☐ Pin this list so that it never gets closed?

Would you like to use a template?

No thanks, create a brand new list

Defaults for new tasks

Edit

Assigned to Anyone

Following changes Nobody

Following comments Nobody

Private No

Priority None

Estimated time 0 mins

Start date No date

Due date No date

Add this task list or Cancel

★ APMP Checklists Presentation
APMP



OVERVIEW **TASKS** MESSAGES FILES TIME NOTE

Filter by user

All users

Task lists

No active lists

Reports

Task lists report

Gantt chart export...

Gantt chart

New task list

Give the list a name (eg. "Changes to layout" or "Bug fixes / typos")

Notes Privacy Milestone **Advanced**

☐ Pin this list so that it never gets closed?

Would you like to use a template?

No thanks, create a brand new list

No thanks, create a brand new list

Yes, use this template:

Editing - single editor (4 tasks)

Editing - multiple editors (5 tasks)

EU editing (2 tasks)

Writing (7 tasks)

Bain writing project (4 tasks)

Bidding (5 tasks)

Oregon monthly content (6 tasks · Private)

Closeout & billing (3 tasks)

Kickoff meeting setup (11 tasks)

Priority None Estimated time 0 mins

Start date No date Due date No date

Add this task list or Cancel

★ APMP Checklists Presentation
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Filter by user

All users

Task lists

Kickoff meeting setup 11

Reports

Task lists report

Gantt chart export...

Gantt chart

OVERVIEW TASKS MESSAGES FILES TIME NOTEBOOKS LINKS BILLING PEOPLE

▼ Kickoff meeting setup

- | | | |
|--------------------------|-------------|--|
| <input type="checkbox"/> | Aaron K. | Reserve conference room |
| <input type="checkbox"/> | Aaron K. | Invite participants |
| <input type="checkbox"/> | Anyone | Create proposal team org chart |
| <input type="checkbox"/> | Anyone | Develop proposal development budget |
| <input type="checkbox"/> | Anyone | Establish a proposal team contact list |
| <input type="checkbox"/> | Aaron K. | Develop email distribution groups |
| <input type="checkbox"/> | Aaron K. | Set up SharePoint collaborative space |
| <input type="checkbox"/> | Anyone | Create proposal development schedule |
| <input type="checkbox"/> | Anyone | Create proposal outline |
| <input type="checkbox"/> | Anyone | Create the compliance matrix and cross-reference |
| <input type="checkbox"/> | Samantha E. | Develop proposal stylesheet |

+ Add a task

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APMP

Filter by user

All users

Task lists

Kickoff meeting setup 11

Reports

Task lists report

Gantt chart export...

Gantt chart

OVERVIEW TASKS MESSAGES FILES TIME NOTEBOOKS LINKS BILLING PEOPLE

Kickoff meeting setup

☐ Aaron K. Reserve conference room☐ Aaron K. Invite participants☐ Create proposal team org chart

Who should do this?

Laurie Wells

Start Date (optional)

03/04/2015

Due Date (optional)

03/05/2015

☐ Notify by email?

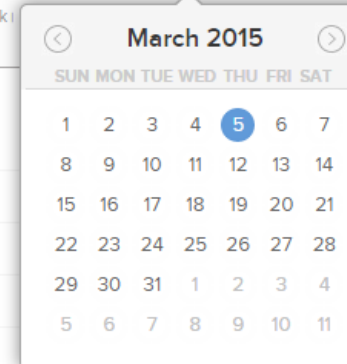
+ Multiple People

Today | -1 Day | -1 Week |

Save my changes or Cancel

☐ Anyone Develop proposal development budget☐ Anyone Establish a proposal team contact list☐ Aaron K. Develop email distribution groups☐ Aaron K. Set up SharePoint collaborative space☐ Anyone Create proposal development schedule☐ Anyone Create proposal outline☐ Anyone Create the compliance matrix and cross-reference☐ Samantha E. Develop proposal stylesheet

+ Add a task



★ APMP Checklists Presentation

APMP



Filter by user

All users ▼

Task lists

Kickoff meeting setup

7

Reports

Task lists report

Gantt chart export...

Gantt chart

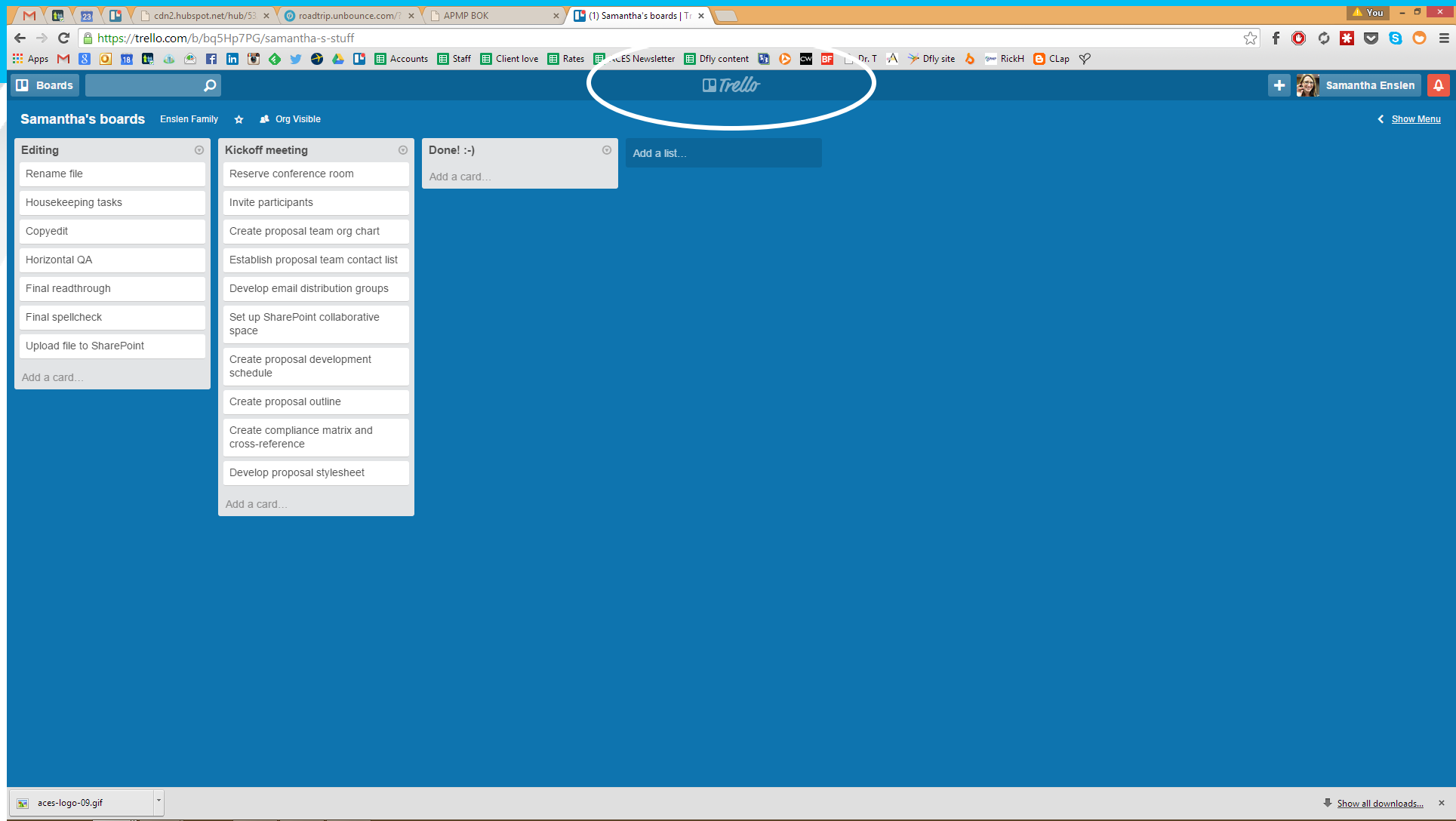
OVERVIEW **TASKS** MESSAGES FILES TIME NOTEBOOKS LINKS BILLING PEOPLE

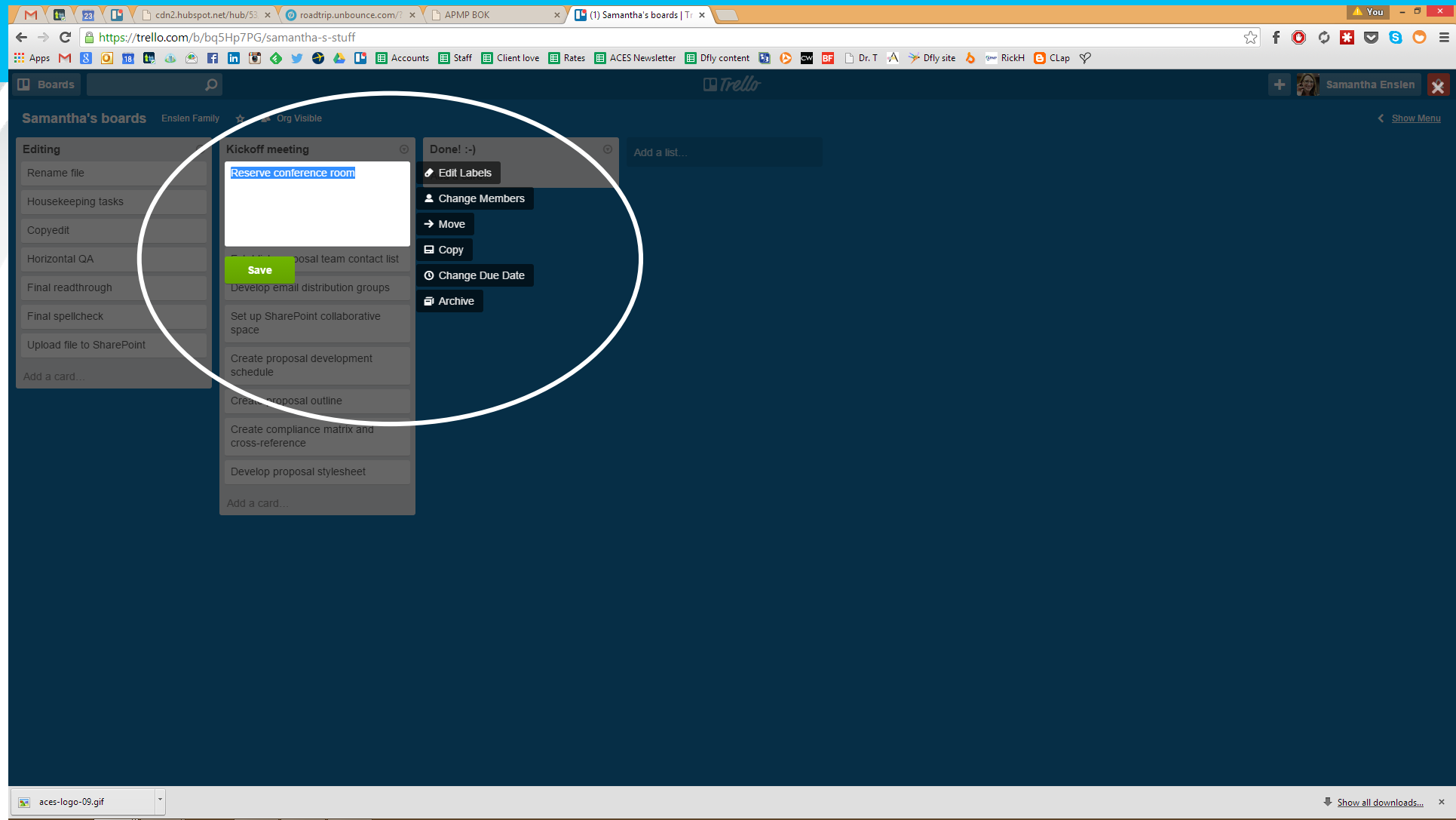
▼ Kickoff meeting setup

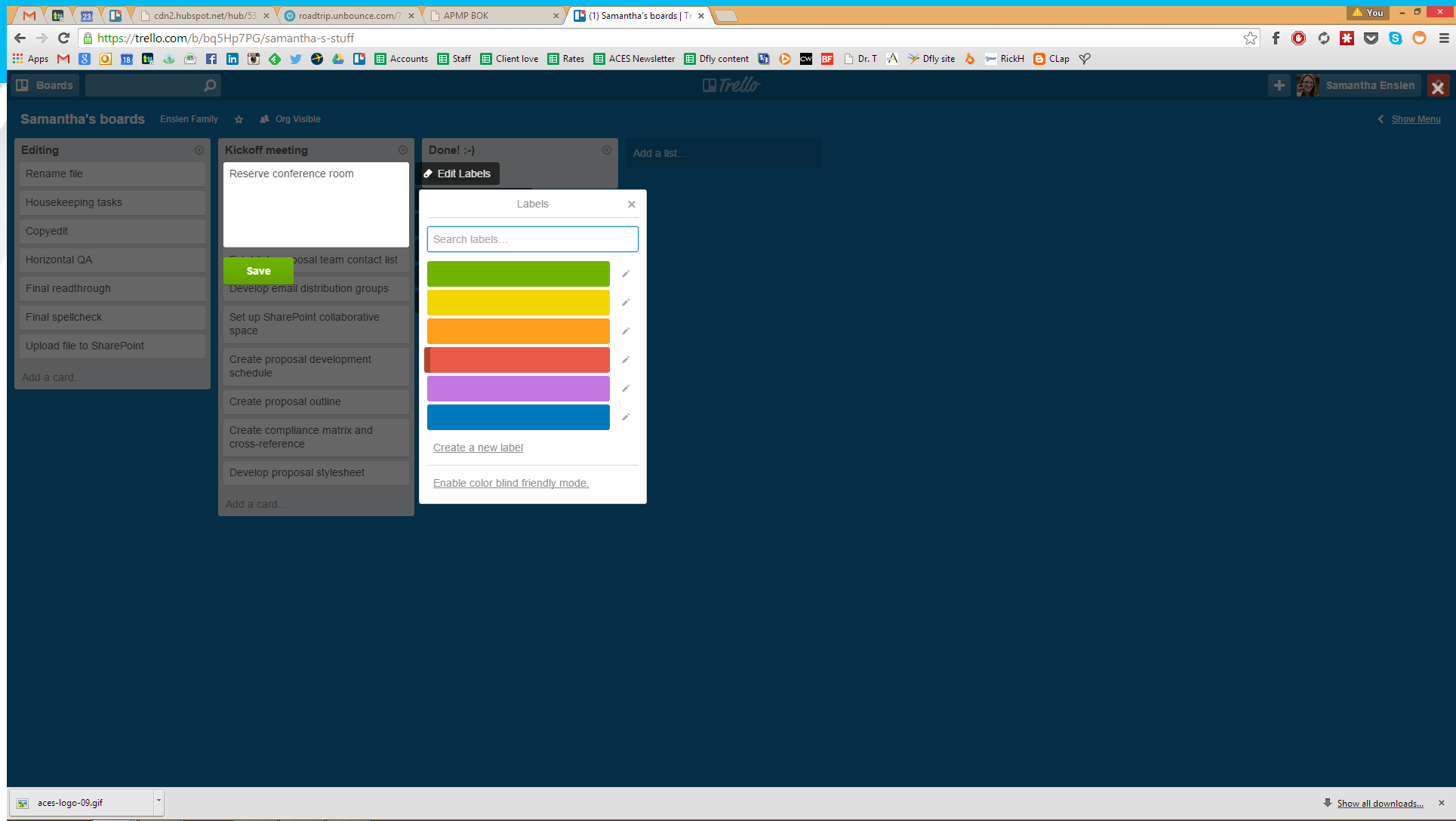
- | | | |
|-------------------------------------|-------------|--|
| <input checked="" type="checkbox"/> | Aaron K. | Reserve conference room |
| <input checked="" type="checkbox"/> | Aaron K. | Invite participants |
| <input checked="" type="checkbox"/> | Laurie W. | Create proposal team org chart |
| <input checked="" type="checkbox"/> | Anyone | Develop proposal development budget |
| <input type="checkbox"/> | Anyone | Establish a proposal team contact list |
| <input type="checkbox"/> | Aaron K. | Develop email distribution groups |
| <input type="checkbox"/> | Aaron K. | Set up SharePoint collaborative space |
| <input type="checkbox"/> | Anyone | Create proposal development schedule |
| <input type="checkbox"/> | Anyone | Create proposal outline |
| <input type="checkbox"/> | Anyone | Create the compliance matrix and cross-reference |
| <input type="checkbox"/> | Samantha E. | Develop proposal stylesheet |

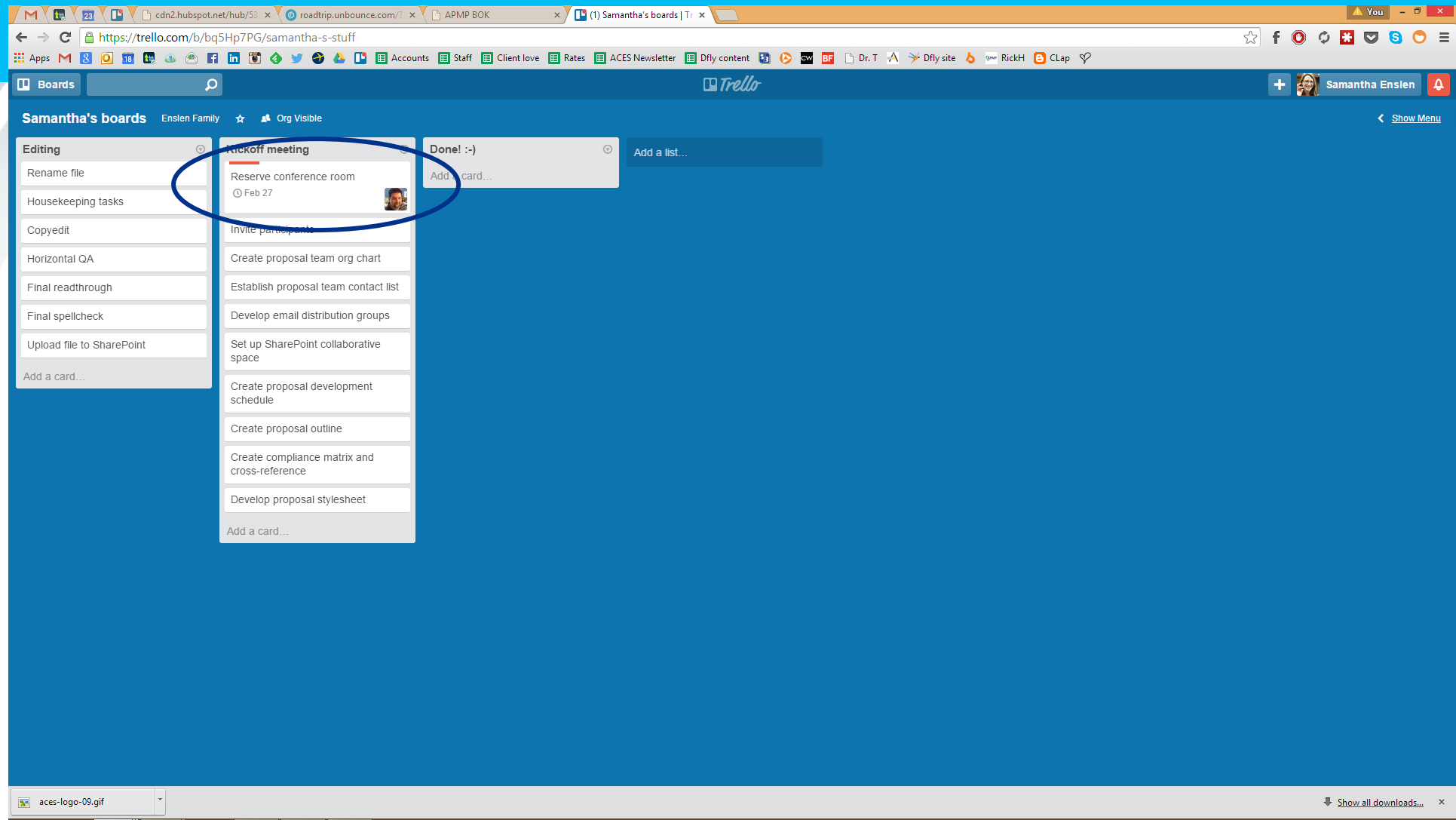
 Add a task

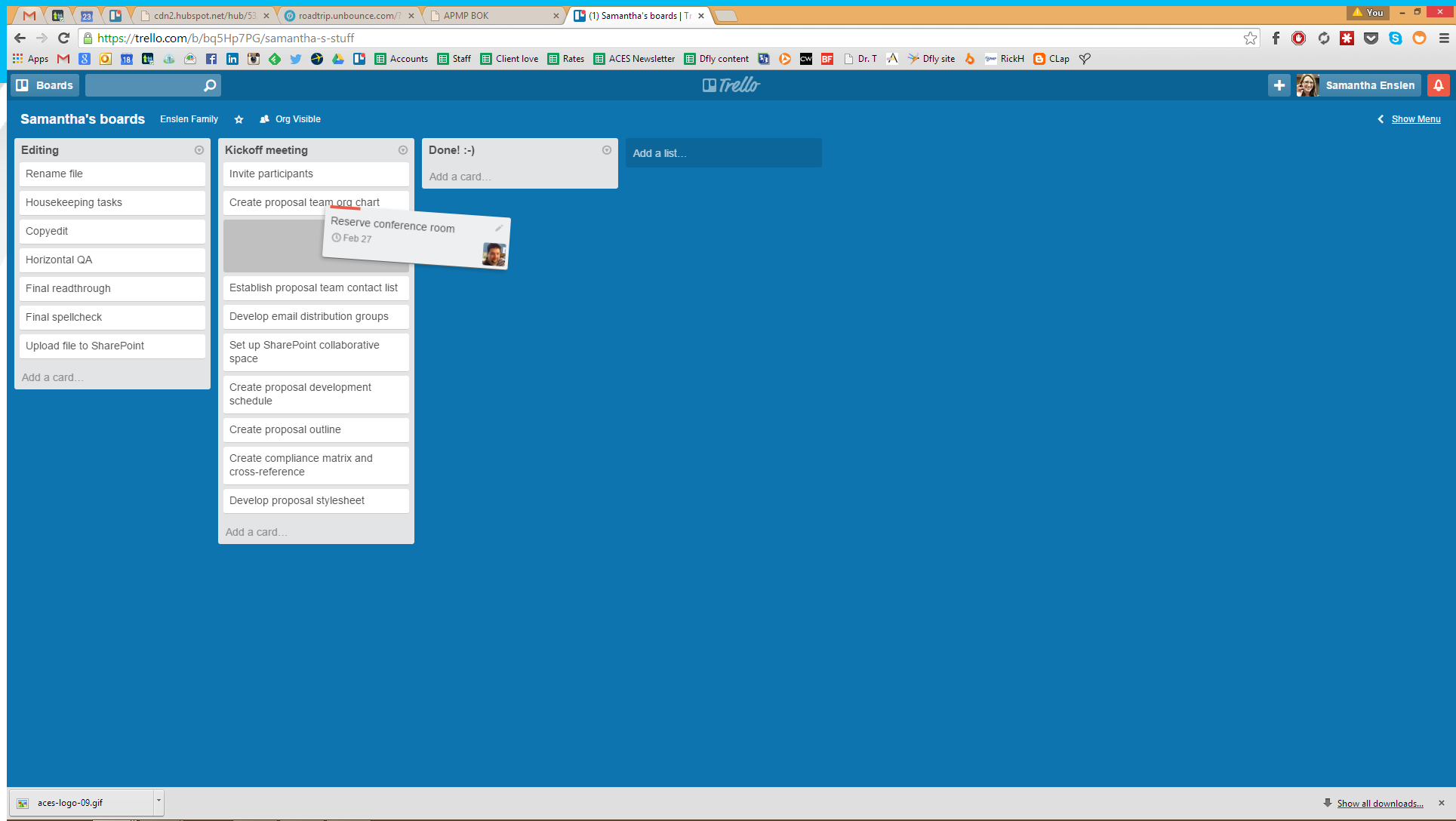
[4 completed](#)

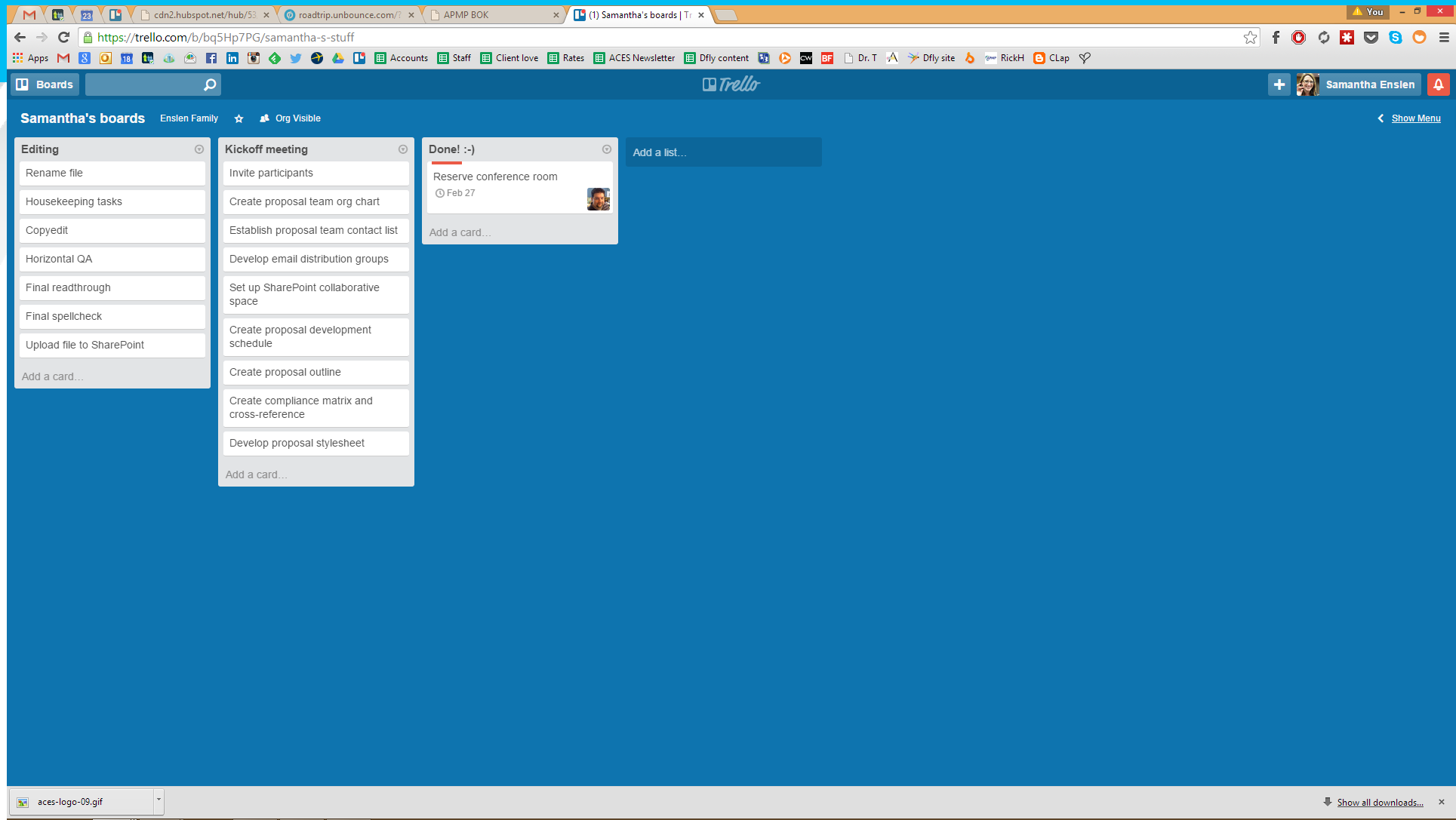


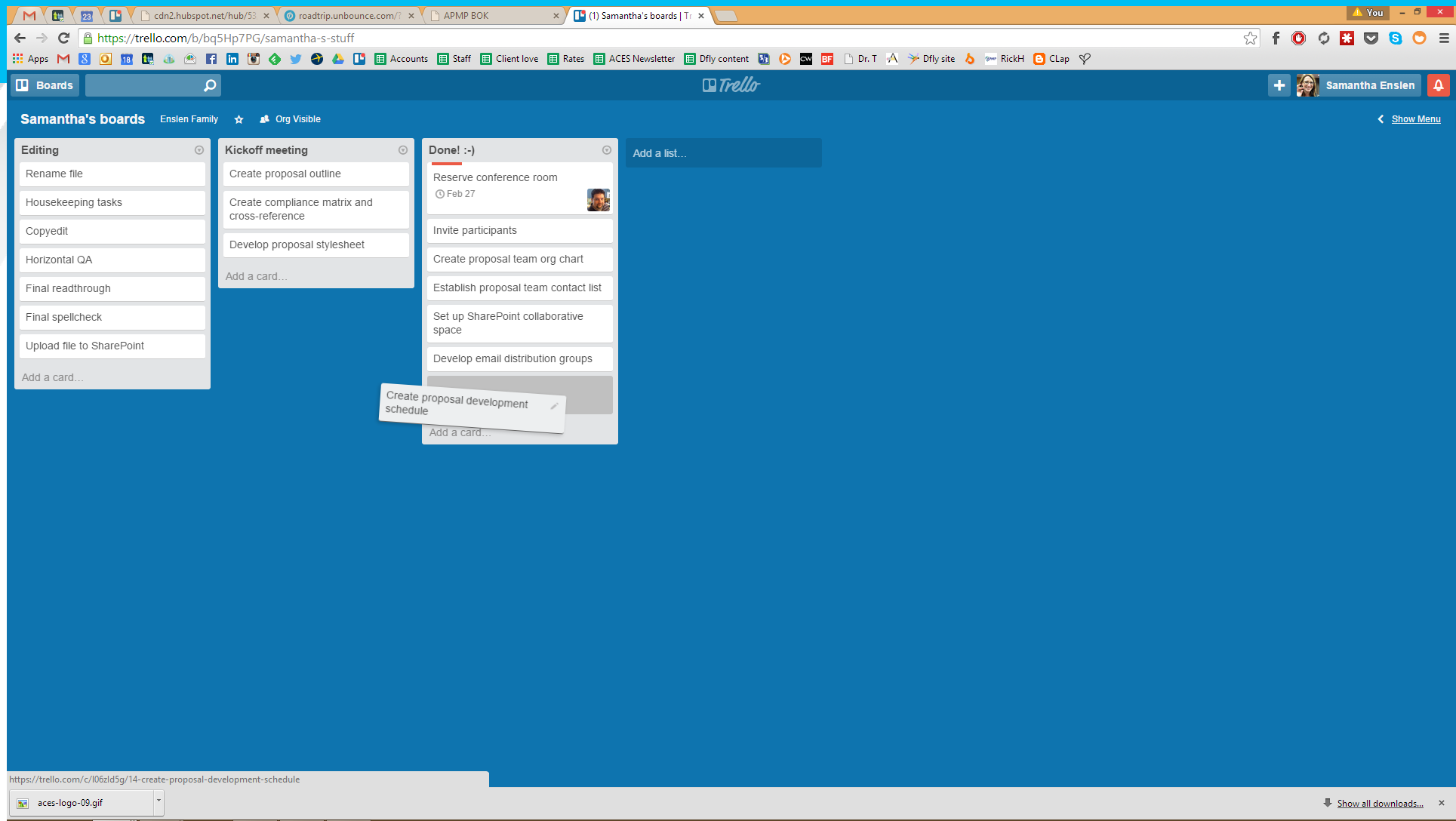












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Standard Editorial Process

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 ens, ems, and slashes
 - ☐ 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
- ☐ first copyediting pass (see page 2)
- ☐ Run Comments
- ☐ for errors that were missed to potentially introduce
- ☐ you can

Final questions?

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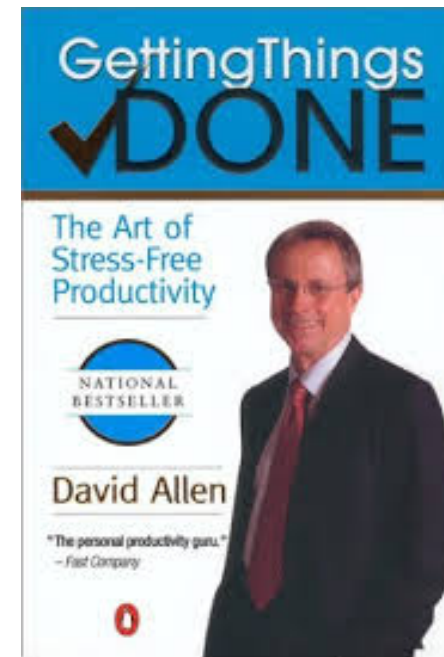
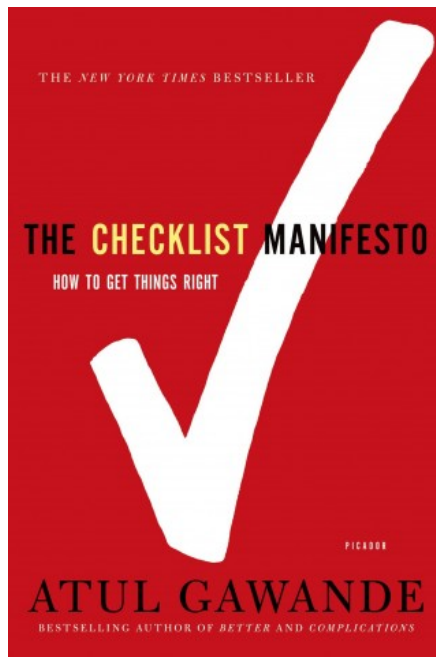
Next steps

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- Look through these checklists
- Adapt them for your processes
- Try them out
- Rework them and try 'em again
- Automate 'em

To learn more

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Thanks! Write me!

sam@dragonflyeditorial.com