

Using Checklists for Effective and Efficient Copyediting and Proofreading

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Why use a checklist?

- “checklists save lives” —WHO, 2008
- They help you
 - focus
 - not miss a task
 - track, schedule, and estimate projects
 - work more efficiently
 - assign priority to tasks



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Three ways to use a checklist

- after editing: “looking-back” checklist
- before and during editing: reminder checklist
- before and during editing: task-based checklist



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“Looking-back” checklist

- items are worded as though the work is completed
 - “Do subjects and verbs agree in number?”
 - “Have I made figure titles consistent?”
 - “Are pronouns correct?”
- the least useful way to use a checklist
 - looking back is not as effective as looking forward



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Reminder checklist

- lists the things you should do
- useful for documents that are mostly text
- contains items such as
 - ☐ “ensure subject-verb agreement”
 - ☐ “ensure figure titles are consistent”
 - ☐ “check pronouns and their antecedents”



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A checklist can be useful at any editing stage, but I use mine for the final reading, after I think I’ve caught everything. I then search the whole document again, taking one pass through the document for each list item. That sounds time-consuming—and sometimes it is—but it often goes quickly, especially if you use the search function to help you.

—Tracey Anderson, “Check Mates: Create a Checklist as an Editing Tool.” The Editors’ Weekly, the official blog of Editors Canada, 2 May 2017; traceylanderson.weebly.com; @tracey_anderson (Twitter)



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Editing Macros and Software

- Paul Beverley's *Macros for Editors*
 - <http://www.archivepub.co.uk/macros.html>
- Editorium: Editor's Toolkit
 - <http://www.editorium.com/>
- PerfectIt
 - <http://www.intelligentediting.com/>



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Task-based checklist

- lays out in detail what you need to do
- breaks down editing work into small chunks
- helps track progress
- orders workflow



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List(s) of ingredients

- Check that all occurrences of a particular ingredient are consistent throughout the text, and note any style or wording decisions on a style sheet (e.g., “freshly ground black pepper” versus “ground black pepper” versus “cracked black pepper,” etc.).
- Check preparation instructions. Are they specific enough? Are they too specific? (For example, “2 red bell peppers” probably isn’t enough information; do they need to be seeded? Chopped or sliced? By contrast, “1 onion, peeled and thinly sliced” is likely too specific; one can safely assume that a thinly sliced onion will be peeled first. Likewise, one can usually assume that all produce will be washed.)
- Check: does the preparation jibe with the way the ingredient is measured? “2 onions, chopped” makes sense, and so does “2 cups chopped onion,” but “2 cups onions, chopped” does not.
- Check that the preparation is consistently expressed throughout the book (e.g., “quartered” versus “cut into quarters”; “juliened” versus “julienne” versus “cut into julienne”).
- Check ingredients against the recipe title. In general, those mentioned in the title should not be listed as “optional.”
- Check accuracy and consistency of any conversions (e.g., “1 tsp minced garlic (1 large clove)” —is this consistent throughout?).
- Check that recipes are cross-referenced where necessary.
- Check that there is consistency in whether and how a staple is listed (e.g., “salt and pepper to taste” versus just “salt and pepper” versus not listing; “butter for greasing the pan” versus “1/2 tsp butter, for greasing the pan” versus not listing). Note the decision on the style sheet.
- Check that optional and garnish ingredients are consistently indicated (e.g., comma, then “optional” versus “(optional)”; “for garnish” versus “(garnish),” etc.). Note the decision on the style sheet.
- Check for consistency in the way possible substitutes are treated. In general, alternative ingredients that are just as good should be listed as “x or y”; if one ingredient is preferred but another will do in a pinch, use parentheses: “x (or y)”. If an ingredient is listed in the title, it should, in general, be the preferred ingredient. If different quantities are required for the alternatives, make sure this is indicated in a consistent style throughout. Note the decision on the style sheet.

—“Copy-editing Checklist for Cookbooks.” Iva Cheung and Figure 1 Publishing; ivacheung.com, figure1publishing.com

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Running through a list of checks—rather than working linearly through a manuscript—can also help you see the words in a new way. ... Actually checking off each item means that your familiarity with the task won’t get in the way of completing every little item.

Copyediting.com “Checklists Save Lives, and Editors Too,”
27 January 2014



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How do you create a task-based checklist?

- create a template—look at
 - checklists in books and websites on editing
 - sample checklists in handouts
 - past projects
- adapt the template for a project
 - read the brief and other memos, style sheet/house style
 - go through the document and list the identifiable elements



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The desktop apps I use for task management allow you to duplicate lists, so I keep a master editing checklist and duplicate it to each client project in the task manager. (Omnifocus and The Hit List are the two I use.)

—Heath Sledge, Heath Sledge Writing and Editing,
heathsledge.com; @marigolds (Twitter)



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Summary

- use checklists that remind and guide
- make checklists your own
- adapt, customize, experiment, tinker, refine
- look for ways to automate tasks
- consider how your workflow might change



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