

CHECKLIST

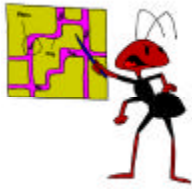
Grocery List
✓ Milk
✓ Hamburger Buns
✓ Flour
✓ Rice
✓ Cereal
✓ Onions
✓ Apples



Purpose

A **checklist** is an itemized listing of things still remaining to be completed or done prior to the end of an event, step, or process. **Checklists** are probably the most widely used of all analytical tools. They are used by individuals and all types of groups to ensure needed steps are completed. The most common **checklists** are shopping lists or to-do lists.

It is used to systematically display and compare information gathered, track completed tasks, to record data and to assist in analysis of a problem. A **checklist** may also contain who on the team is responsible for completion of an item on the **checklist**.



Process

1. Gather all information needed to complete the task in question. This may be the result of a brainstorming session or other idea generation tool.
2. Organize the data to ensure duplication is eliminated and that listed items belong on the list in question.
3. Question the items remaining on the list. Are there other things that need to be completed prior to doing each item on the list? Add these items if necessary.
4. Assign items remaining on the list based on team input.
5. Where necessary, assign completion dates.
6. Ensure that all team members have a copy of the **checklist**.



Example

Simple unstructured checklist. This one prepared over time as items for the list are discovered:

Grocery List

- * Milk
- * Hamburger Buns
- * Flour
- * Rice
- * Cereal
- * Onions
- * Apples

More structured **checklist**. Does include team members assigned and needed completion dates.

Team **Checklist**

- * Schedule meeting room, Angela, one week before next meeting
- * Obtain overhead projector, Terrance, for next meeting
- * Copy updated personnel roster, Jackie, for next meeting
- * Send out agenda to team members, Robert, one week before next meeting
- * Research data on population trends, Katherine, for August meeting
- * Verify survey data against historical data, Terrance, for May meeting
- * Have report to team on population breakdown, Clarice, for next meeting



Key Points

- There is no correct or incorrect method of preparing a **checklist**.
- A **checklist** could be items extracted from other sources such as process manuals or technical publications.
- A **checklist** saves time and ensures completion of all needed tasks.
- **Checklists** may or may not be prioritized.

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