

The Checklist – a simple but valuable tool

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Henry's company recently purchased a second-hand vehicle. Two days after the purchase, it was discovered that the car's radio antenna and passenger floor mats were missing. Fortunately, the previous owner still had those items in his possession and willingly handed them over. The incident got Henry thinking of different ways to prevent this kind of error-of-omission from happening in the future, with any kind of project that his company undertakes.

One solution is the documentation of every step that needs to be taken during the implementation of every project. This is especially easy to do for projects or activities that are conducted repetitively. What are the five things that the person who unlocks the office every morning needs to do as soon as they arrive on the premises? When anyone answers the company telephone, what are the three things that must be said to every caller? When filling a customer order, what are the seven things you must do? Make a sequential list of the things that need to be done and in the left hand margin of the document, by each item, provide a blank box that will be ticked as each task is completed. Checklists are simple tools that deliver valuable benefits.

PROVIDE A SINGLE REFERENCE DOCUMENT

Checklists provide a comprehensive list of all the steps required to complete an activity or project. Henry could have created a vehicle inspection checklist. The document would have named all the areas of the vehicle that needed to be inspected and deemed to be in acceptable condition before the transaction was completed. The missing items would have been identified before the vehicle was handed over and a suitable solution provided.

Creating a single checklist of all the steps involved in a process allows process experts to quickly spot any steps that may have been accidentally excluded. Those steps may then be added to the list before project implementation begins. The project teams will appreciate having all the steps involved in a single reference document.

MONITOR PROGRESS

Each item is ticked off the list as it is completed. Checklists therefore provide a simple way for one to monitor one's progress in the implementation of an assignment. By looking at your checklist and noting the proportion of tasks that have already been completed, you will be able to determine how much more time is required for assignment completion.

MAKE DELEGATION EASY

Checklists make the delegation of assignments much easier. Instead of having to issue verbal instructions or stand over a new recruit who is learning how to do their job, you could simply hand them a detailed checklist. They would use the checklist as a guide and would only come to you with questions. This frees up time, allowing you to engage in other activities.

CHECKLIST EXAMPLE – Opening the office in the morning

1. Unlock the main entrance
2. Open all windows
3. Empty the waste paper baskets
4. Fill the thermos flasks with hot, boiled water