When you use a prepared checklist, feel free to review it in light of your particular situation and revise it as necessary. But before eliminating an item, think hard about why it’s on the checklist and whether it’s applicable to your situation.

Before you jump into a new phase of a project, prepare a checklist of critical steps to take and perhaps another one of issues you don’t want to overlook. The time spent will be well repaid.

When you are creating a checklist for steps of a process, prepare a flowchart first to determine what the steps are and their sequence.

At step 3, you might give the preliminary list of items from step 2 to the person in the group who is best with words. Writing by committee is difficult. Alternatively, if correct wording is a sensitive issue, consider using wordsmithing to include everyone’s ideas.

Review the operational definitions tool and be sure terms in your checklist are unambiguous.

In step 7, be creative. Consider putting up a poster of the checklist on the wall near the work area. Or hang from a hook a clipboard with the checklist. If you use a checklist in every team meeting, keep it in the file folder you bring to the meetings. Or print it on the reverse side of the team agenda. For checklists that will be frequently used by a large number of people, consider laminated pocket-size cards.

In step 8, never assume you remember the items on the checklist. The whole point of a checklist is to keep you from forgetting something, and if you’ve forgotten, you don’t know you’ve forgotten! Look at the checklist to make sure.

If items absolutely must be done in a certain order, use mistake-proofing so that an incorrect order is impossible.

A checklist is a specialized form of the generic check sheet. See check sheet for more information.

check sheet

Variation: defect concentration diagram
See also: checklist

Description

A check sheet is a structured, prepared form for collecting and analyzing data. This is a generic tool that can be adapted for a wide variety of purposes.

check sheet
When to Use

- When data can be observed and collected repeatedly by the same person or at the same location, and . . .

- When collecting data on the frequency or patterns of events, problems, defects, defect location, defect causes, and so forth, or . . .

- When collecting data from a production process

Procedure

1. Decide what event or problem will be observed. Develop operational definitions.

2. Decide when data will be collected and for how long.

3. Design the form. Set it up so that data can be recorded simply by making check marks or Xs or similar symbols and so that data does not have to be recopied for analysis.

4. Label all spaces on the form.

5. Test the check sheet for a short trial period to be sure it collects the appropriate data and is easy to use.

6. Each time the targeted event or problem occurs, record data on the check sheet.

Example

Figure 5.14 shows a check sheet used to collect data on telephone interruptions. The tick marks were added as data was collected over several weeks' time. What days are worst for interruptions? Which interruptions are most frequent? This check sheet was designed in the same format as a contingency table, so that the data can be analyzed with chi-square hypothesis tests without recopying into a different format.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Mon</th>
<th>Tues</th>
<th>Wed</th>
<th>Thurs</th>
<th>Fri</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wrong number</td>
<td>#ff</td>
<td></td>
<td></td>
<td></td>
<td>#ff</td>
<td>#ff</td>
</tr>
<tr>
<td>Info request</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boss</td>
<td>#ff</td>
<td></td>
<td></td>
<td></td>
<td>#ff</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>12</td>
<td>6</td>
<td>10</td>
<td>8</td>
<td>13</td>
<td>49</td>
</tr>
</tbody>
</table>

Figure 5.14  Check sheet example.