

Title:

Strategic Checklists

Word Count:

494

Summary:

A checklist can be more than simply a list of things to do; it can strategically communicate to readers that you have carefully analyzed your message and that the content is well organized.

Keywords:

checklist, strategic checklist, effective communication

Article Body:

I've been through a couple of checklists in the past few days, and it's reaffirmed my faith in their effectiveness as a communication tool.

Now, there are at least a couple of ways we can look at checklists: in the strategic and tactical senses. You'll probably recognize the tactical advantages of using checklists: a clear and logical, as well as economical, way to write.

But, let's look at checklists from the strategic perspective today, and explore them as a tool for achieving our objectives.

Specifically, that means we'll think of using them to reinforce or change the perceptions of others. For example, if you write out information about something that has to be done, a checklist sends a couple of messages. First, that you're a well-organized person, and that your message is quite rational.

The creation of a checklist, in itself, should send a message that you've given more than cursory attention to the message. It implies that you've thought about the process you're asking others to follow. It also implies that you've taken extra time to compose your message; you've added value by adding additional structure.

The recipient of your message, then, should have the sense that you take the message seriously, because you've taken extra trouble to develop it in an orderly way. And, that kind of perception, in turn should make the recipient more willing to follow your instructions.

Having said all that, we should step back and ask ourselves where we can use

checklists effectively. As I've written this article, I've asked myself if it shouldn't be in a checklist format. But, apparently not; at least I can't see how it work well.

That's because checklists work best for very linear kinds of information delivery. The instructions for starting a computer or piece of equipment, for example. In these cases, there's no room for nuance or fine distinctions. A switch turns on, or it turns off; we don't discuss the way the switch looks or sounds. So, think of checklists as tools for developing lists or describing sequential actions.

This context also leads to another strategic use for checklists, which is to ensure nothing is forgotten and nothing extra goes into the instructions. Make a checklist of the steps involved in a process and you have a tool for seeing that it stays on track.

You can also use checklists for inclusion and exclusion. For example, when I travel, I print a packing checklist to make sure I pack the things I need, and perhaps just as important, don't pack items I don't need.

In this case, the checklist also acts a memory jogging tool. Having started on the packing list, some non-list items may be recalled. For example, if I make a note to include a magazine to read on the plane, then I might also remember to stop delivery of the newspapers while I'm away. That's then something new to add to the next iteration of the checklist.