

Pre-Send QA Checklist (SOP)

Oct 16, 2026 · @Edda Dena

Purpose and when it runs

Nothing reaches the executive or an external contact until it passes these 12 checks. **Time box: 5 minutes.** If the check takes longer, the document is too complex and gets simplified before it is sent.

Run it before every send, and again after **any** edit, however small. A fix in one place can break something somewhere else.

Built from the errors I found in my own work samples; see the last two sections.

The checklist

A. Accuracy

- ☐ 1. Does every date, time, name and figure match its source (the calendar, transcript or data)?
- ☐ 2. Does every time show its time zone, and does every weekday match its date?
- ☐ 3. Are comparisons like-for-like: same period, same basis (for example, 12 weeks of actuals against 12 weeks of budget)?
- ☐ 4. Is every stated reason true against the facts?

B. Limits

- ☐ 5. Is it within every word, sentence and page limit in the brief?

C. Consistency

- ☐ 6. Do all tables, statuses and IDs agree with the master tracker?

D. Completeness

- ☐ 7. Are there no placeholders left ("update", "TBD", "[", "xx")?
- ☐ 8. Does every page carry its required label or header, with no blank pages?

E. Delivery

- ☐ 9. Is it exported to PDF, and did I check the PDF, not my editor's screen view?
- ☐ 10. Did I re-open the saved file from the folder I'm sending it from and confirm the fix is there?
- ☐ 11. After my last edit, did I re-check the whole document, not just the part I changed?

F. Discretion

- ☐ 12. Can every recipient see only what they should? No confidential figures, personal details or internal reasons.

How I check

Group	Method	Time
A. Accuracy	Put the source and the output side by side and tick each figure, time and name once. For any comparison, write the period of both sides next to it.	2 min
B. Limits	Use Word's word count on the selected text, count sentences by their full stops, and check the page count in Print Preview.	30 sec
C. Consistency	Open the master tracker and compare every ID and status that appears more than once.	30 sec
D. Completeness	Search (Ctrl+F) for: update, TBD, [, xx, ?? . Scroll the print preview page by page.	30 sec
E. Delivery	Export the PDF, close the editor, open the PDF from the folder I'm sending it from.	1 min
F. Discretion	Read the document once as the least-senior person on the distribution list would.	30 sec

Built into my templates, so they can't be forgotten:

- The "Work sample" or confidentiality label sits in the header or footer, not in the body text.
- Narrow margins, a 9 pt table style, and a page break before each new section heading.
- Excel print area set from cell A1, fitted to 1 page.

Where each check came from

Every check traces to a real error from my practice work samples (fictional scenarios, October 2026).

Check	Error it would have caught	Sample
1	A meeting time sent to a colleague as 10:30 instead of 11:00	Calendar conflicts
2	(Caught) A review date that fell on a Sunday	Meeting minutes
3	A budget shortfall overstated about 5×: 12 weeks of sales compared against 13 weeks of budget	KPI dashboard
4	A rejected option justified with a reason that wasn't true	Calendar conflicts
5	An executive summary at 444 words against a 200 limit; an email at 6 sentences against 5	Calendar, Minutes
6	An agenda table showing last week's statuses, contradicting the tracker	Meeting minutes
7	"(update with actual time)" left in a delivered document	Meeting minutes

Check	Error it would have caught	Sample
8	The label missing from page 1 three times; a blank page	Minutes, Dashboard
9	A layout that broke on another computer because of a missing font; a grid showing #NAME? in older Excel	Minutes, Calendar
10	An unchanged file re-sent as "fixed"	Meeting minutes
11	Fixing page 1 removed the label from page 4	Meeting minutes
12	(Prevented) Salary and offer terms kept out of minutes that went to all attendees	Meeting minutes

Results log

A **major error** is one that would have misled or embarrassed the executive: a wrong fact, a wrong number, or a broken limit. Each count is what reached the first external review.

Sample	QA checklist used?	Major errors at first review	What they were
1. Calendar conflicts	No	3	Wrong time to a colleague; summary 2× over its limit; false reason for a rejected option
2. Meeting minutes	No	2	Out-of-date action table; placeholder left in
3. KPI dashboard	No	1	Period mismatch in the budget comparison
4. (next sample)	Yes		

The next row is the real test: the first sample produced with this checklist in use.