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Checklist template.

Checklists are some of the most useful types of content around and they can bring some major benefits to your business as well.

These articles are similar to ‘how-tos’, in that they can help readers achieve a certain task. But unlike ‘how-tos’ they are less about walking people through a process and more about helping them ensure that every part of the process is complete. (For this reason, checklists make great companions for how-to articles.)

Your checklist might be purely for the readers’ benefit. It might help them keep on top of something complicated (such as helping them prepare for a home inspection), or it may help them make sure they are doing something to its full potential (like running through tips on what to look for when buying a new car).

You can also use checklists to improve your customer service. For example, let’s say you run a dog grooming business, and you find customers often show up without their pet’s health records, leash and favourite squeaky toy. Creating a checklist titled ‘What to bring to your next grooming appointment’ could help customers be more organised while also saving you and your team time.

**Note:** You may want to make your checklist downloadable rather than putting it directly on your blog. This will allow people to click a button and download their own copy of the checklist. If you do this, there are a few things to keep in mind:

1. Make sure to include your branding on the checklist (such as your logo and business name).
2. Consider whether you want to give them a direct link to the checklist or require them to enter their details to get the asset. This can be a great way to gather emails for your mailing list or bring in new customer leads for your sales team.
3. Write a short introductory ‘teaser’ about the checklist, so people can read about it before they decide whether they want to download it. (This is also good for SEO, as it will give search engines an idea of what the checklist is all about.)

**Checklist template.**

**[Checklist title].**

Be sure to use the word ‘checklist’ in your title so that readers know what to expect. Then write a few words about what the checklist might be about. (Example: Checklist: What to bring to your first financial advisor meeting.)

**Introduction.**

Unless you’ve decided to make the checklist downloadable (and therefore have already written an introductory blog), you’ll want to create a brief introduction prior to the checklist itself.

In 100 - 300 words, describe what the checklist is about and how it will help your readers. Include a call-to-action telling them what to do after they’ve finished the checklist. (Example: Once you have gone through the checklist, you’ll be ready to book an appointment.)

**Checklist section title.**

If you have a long or complex checklist, it might be easier to break it up into sections. For example, let’s say you’re creating a checklist about visiting a financial advisor. You might have one section dedicated to tax documents, another to personal asset documents, and a third for identification documents. Under each heading, include one or two sentences describing what that section is all about.

* **Checklist item.** Include a box or icon, the name of the item in bold and a brief description of that item if necessary.
* **Checklist item.** Keep your descriptions short so the list is easy to read and follow.
  + Some items on your list might have sub-items, which can be displayed like this.
* **Checklist item.** Keep listing out the items on your checklist until you’ve covered everything.

**Conclusion.**

If you chose to make your checklist downloadable and wrote a blog article teaser about it, you can forgo a conclusion. Otherwise, a brief wrap-up about the checklist and what the reader should do next is a good idea. (Example: Now that you’ve got everything you need the next step is to bring it all with you to our offices located at …)