Consistency Checklist for Corporate Documents

A prepublication reference for reports, proposals, and website content

Purpose. Use this checklist to identify inconsistencies that can weaken credibility, confuse readers, or create avoidable revision cycles. It supports editorial review; it does not replace an organization's style guide, legal review, accessibility testing, or subject-matter approval.

How to use this checklist

- Confirm the controlling sources before reviewing: approved brief, brand guide, house style, contract or solicitation requirements, and current source files.
- Review in focused passes. Check content and logic first, then language and mechanics, then visual and technical details.
- Record exceptions. A deliberate variation is acceptable when it serves the reader and is applied consistently in comparable situations.
- Complete the publication-specific section and the final signoff before release.

Review information

Document		**Owner**	
Document type	Report / Proposal / Web	**Reviewer**	
Version		**Review date**	
Governing guide		**Publication date**	

1 Authority and document control

☐ The correct and most current source files were used.

☐ The document matches the approved purpose, audience, scope, and requested deliverable.

☐ Required templates, brand standards, house style, and client instructions were applied.

☐ The title, file name, version number, date, owner, confidentiality label, and document status agree wherever they appear.

☐ Tracked changes, comments, drafting notes, hidden text, sample content, and unresolved placeholders were removed or resolved.

☐ Content requiring legal, compliance, privacy, security, or subject-matter review has received the appropriate approval.

2 Structure and navigation

☐ The document opens with the information readers need to understand its purpose and expected action.

☐ Sections appear in a logical order, and comparable sections follow a consistent pattern.

☐ Heading levels are hierarchical and parallel; no level is skipped without a reason.

☐ Headings accurately describe the content that follows and use a consistent grammatical form.

☐ The table of contents, bookmarks, internal links, cross-references, figure numbers, table numbers, and page references are current.

☐ Repeated information is necessary, consistent, and not contradicted elsewhere.

☐ Appendices, exhibits, attachments, and referenced supporting files are present and correctly labeled.

3 Names, terminology and voice

☐ Organization, division, department, product, service, program, and stakeholder names use their approved forms.

☐ Acronyms are defined at first use and used consistently afterward; unnecessary acronyms were removed.

☐ Key terms have one meaning throughout the document, and synonyms do not create false distinctions.

☐ Capitalization and treatment of branded or technical terms are consistent.

☐ The point of view, level of formality, and tone fit the audience and remain consistent.

☐ Pronouns, person-first or identity-first language, inclusive language, and references to groups follow the governing guidance.

☐ Instructions use consistent verbs and distinguish requirements, recommendations, permissions, and possibilities clearly.

4 Facts, data and claims

☐ Names, titles, credentials, dates, locations, contact details, prices, quantities, and deadlines were verified.

☐ Numbers in prose, tables, charts, captions, summaries, and source files agree.

☐ Units of measure, currencies, time zones, percentages, decimal places, and rounding are handled consistently.

☐ Totals, subtotals, percentages, ranges, and calculations are accurate.

☐ Comparisons use the same population, baseline, unit, and time period.

☐ Claims are supported, appropriately qualified, and distinguish fact from estimate, opinion, or projection.

☐ Statistics and time-sensitive statements include a source and date when readers need that context.

5 Citations links and source attribution

☐ All borrowed language, data, images, ideas, and quotations are credited as required.

☐ Citations follow one style and contain the information readers need to locate the source.

☐ In-text citations, notes, and reference-list entries correspond one to one.

☐ Quotation wording, punctuation, attribution, and omissions match the source.

☐ Hyperlink text describes the destination; raw URLs are used only when appropriate for the format.

☐ External, internal, email, telephone, download, anchor, and button links work and open the intended destination.

☐ Sources are authoritative, current enough for the claim, and approved for use.

6 Language, mechanics and editorial style

☐ Spelling, punctuation, grammar, usage, and sentence structure are correct.

☐ Preferred spelling, hyphenation, capitalization, numerals, dates, times, abbreviations, and serial-comma rules are applied consistently.

☐ Parallel items use parallel structure, especially in headings, lists, procedures, and comparison tables.

☐ Lists use consistent lead-ins, punctuation, capitalization, indentation, and item structure.

☐ Sentences are concise enough for the audience without omitting necessary context or qualifications.

☐ Vague references, undefined jargon, unsupported superlatives, clichés, and ambiguous modifiers were revised.

☐ Searches were run for known trouble terms, legacy names, prohibited language, double spaces, and repeated words.

7 Visual formatting and page integrity

☐ Fonts, type sizes, colors, emphasis, spacing, indentation, alignment, and margins follow the approved design.

☐ Heading, body, list, caption, quotation, note, and hyperlink styles are applied consistently.

☐ Headers, footers, page numbers, section breaks, columns, and orientation changes are correct.

☐ Tables and figures are legible, numbered consistently, referenced in the text, and placed near the relevant discussion.

☐ Table headers repeat when needed; columns align; labels, legends, symbols, and color meanings are consistent.

☐ No text, table rows, captions, headings, or list introductions are stranded awkwardly across pages.

☐ The final output contains no clipping, overlap, unexpected blank pages, broken characters, or low-resolution visuals.

8 Accessibility and usability

☐ The reading order and heading structure are logical for assistive technology.

☐ Images and informative graphics have useful alternative text; decorative images are marked appropriately.

☐ Color is not the only way information is communicated, and text contrast is sufficient.

☐ Tables have clear headers and are used for data rather than page layout.

☐ Link text is meaningful out of context; instructions do not depend only on position, shape, color, or sensory cues.

☐ The document can be understood at the expected reading level, with definitions or explanations where needed.

☐ The published file has a descriptive title, correct language setting, and accessible export settings.

Publication specific checks

Complete the section that matches the publication format. Complete more than one section when content will be repurposed across channels.

Reports

☐ The executive summary accurately reflects the report's findings, conclusions, and recommendations.

☐ Research questions, methods, limitations, findings, and recommendations are clearly distinguished.

☐ Charts and tables use consistent scales, labels, periods, categories, and source notes.

☐ Recommendations identify the responsible party, action, timing, or decision point when applicable.

Proposals

☐ Every requirement in the request, brief, or solicitation is addressed and easy for evaluators to locate.

☐ The proposed scope, deliverables, schedule, staffing, assumptions, dependencies, exclusions, and pricing agree across sections.

☐ Claims about experience and capacity are accurate and supported by relevant evidence.

☐ Terms, expiration dates, signatures, attachments, and submission instructions are complete.

Website content

☐ Page title, browser title, meta description, URL, navigation label, heading, and call to action accurately represent the page.

☐ Reusable content such as addresses, biographies, service descriptions, policies, and legal language matches the current source of truth.

☐ Desktop and mobile layouts were checked for wrapping, spacing, hierarchy, and interaction behavior.

☐ Forms, confirmation messages, downloads, buttons, analytics tags, redirects, and error states function as intended.

Final prepublication review

☐ A clean copy was reviewed after all accepted changes were incorporated.

☐ The document was reviewed in its publication format, not only in the source application.

☐ Automated spelling, grammar, link, accessibility, and quality checks were run where available, and their results were evaluated by a reviewer.

☐ At least one reviewer checked high-risk elements such as names, numbers, dates, links, legal language, and calls to action.

☐ The approved file is clearly identified, stored in the correct location, and distinguishable from working drafts.

☐ Publication permissions, approvals, and handoff responsibilities are documented.

Exceptions and final disposition

Item or location	Issue or approved exception	Owner and disposition

Final status ☐ Approved for publication ☐ Approved with documented exceptions ☐ Return for revision

Reviewer signature or initials _____ **Date** _____