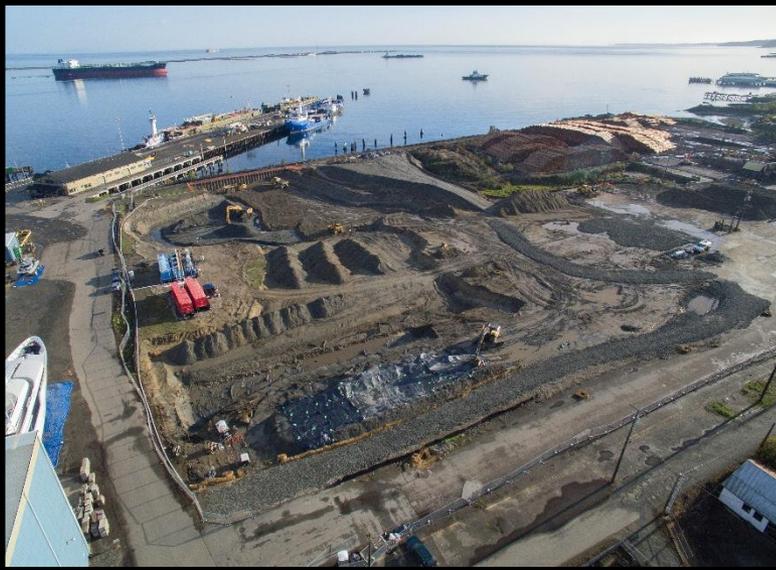


Creating a Pro-Editing Culture in a Corporate Environment

FLOYD | SNIDER
strategy ■ science ■ engineering



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Presented by
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Floyd | Snider
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Goals for today's presentation

- **Making your editing team an essential part of your corporation**
 - Show authors/principals all the ways you can help them (and the firm) look good
 - Stay in an author's line of sight
 - Use management savvy
 - Develop conflict management skills



Staff demographics



- **Engineering and environmental consulting firm**
- **35-person firm of engineers, geologists, toxicologists, biologists, and support staff**
- **Some have significant writing experience from their schooling...others do not**

- **Editing team consists of:**
 - Managing editor
 - Technical editor
 - Format specialist
 - Graphics developer

Then vs. now

- Original set up had editors/project assistants who were seen as assistants by technical staff (even when editing)
- Editing was not a required part of document development, although some authors did use us regularly
- I encouraged people to use me, then developed solid examples to present to the firm/principals on why authors should be *required* to use me
- My growing team now sees about 60 documents a month, ranging from small 2-page letters to large 700- to 5,000-page reports

Then	Now
Stringent editing system	Open to team needs
Inconsistent requirements	Clear system for submittal
Assistance-based system	Equal teaming process

The tools and tactics used to get from Then to Now

- **Everything I did to change my environment involved keeping visible and being needed in the workplace**
 - Make things easier for the authors (and yourself)
 - Department management
 - Scheduling
 - Providing information to authors
 - Corporate initiatives
 - Stay relevant
 - Work with the team, not against them



Make Things Easier: Run your department like a full publication house

- **We hold a operations meeting once a week**
 - When the person who was running the weekly operations meeting got a promotion, I used that as an opportunity to “take something off his plate,” but really it allowed me to make the meeting more useful to the editing department
 - Advertised as a chance for the authors to hear from each other about what is going on, but it’s actually a time for me to hear what documents are coming up
- **Check in with authors after meetings and once a quarter**
- **Keep a list of all upcoming documents (even months out)**
 - Helps to plan work/life balance, helps track what to be listening for in meetings/around the office

Project	Document	Contact	To Edit	Due	Notes	First Mention	Issues
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- **Track items you have completed**
 - Keep track of missed deadlines, unusual communication issues
 - Also is a good reminder for when you come to your own employee review

Make Things Easier: Scheduling

- **When I learn of a new document, I stop by the author's office and sit down with them to go over schedule**
 - Work backward from a deadline to set a realistic schedule for document review (including internal deadlines)
- **Make multiple internal deadlines**
 - Keeps authors, PM, and editing team accountable for their piece of the puzzle
 - It ensures that the editing team has availability to give each document the attention it needs
- **Authors need to know that missing a deadline by 1 day cuts back on our time to make the document better**
- **Also remind them to keep lines of communication open when a deadline shifts**
 - If we are holding time for them that can be used for something else, that's important for us to know

Due Date
PDF to author for final review
PDF to final QC
Final redlines to editing department
Redlines to author
Full edit/format
Senior review
Technical QC

Make Things Easier: Provide information to authors so they have the tools they need to succeed

- **Estimates of how long it takes for different levels of edit**

Report Type	Cursory Edit	Full Edit	Production
Large Document (80+ pages plus tables, figures, appendices)	20 to 40 hrs	40 to 60 hrs	10 hrs
Medium Document (30+ pages, plus a few tables/figures)	4 hrs	16 hrs	4 hrs
Small Document (short memo or letter)	2 hrs	Up to 8 hrs	1 to 2 hrs

- **Review their budgeted hours for editing and then provide feedback**
 - Editing team reviews/finalizes fee estimates so we are able to see whether their budget is appropriate
- **Style guides: A full version for editing team, condensed version with key points for authors**
 - This will make them more confident in their writing
 - It will also help avoid some of the more common errors we correct day in and day out

Make Things Easier: Corporate initiatives

- As your team becomes more indispensable, you can find “cheerleaders” who can help get you more traction in the office
- Develop initiatives that help the firm and your workflow
- These can be small protocol changes that keep you sane or larger undertakings that make the entire firm better



Make Things Easier: Recent initiative that has proven successful

- **Implemented a QC process to make authors take responsibility for their work and lessen the editor's load**
 - Uses a second technical staff person to QC work and identify questionable conclusions, missing puzzle pieces, and blatant errors
- **Outcomes**
 - Handoff to the editing team goes smoothly
 - Less back and forth between editor and author
 - Editor can focus on the grammar and style of the document
 - Documents are even more polished and perfected before they are submitted
 - Author and the firm look good
- **Bonuses**
 - Other authors are given the opportunity to read their colleagues' works
 - Document author is given clear feedback on missing points, unclear writing, and inaccuracies
 - Authors see that the editors aren't being picky about their writing—other people caught these errors too

Stay relevant: Keep finding ways to drive your point home

- **Present to staff regularly at staff meetings on various topics**
 - Levels of edit
 - Best practices
 - Quality control in data and historical documentation
 - How to “write good”
- **This provides refreshers on our policies and keeps the editing team at the front of their minds**
 - How to communicate with the editors
 - What additional skills the team has
- **Send weekly emails re: editing team workload**
 - Allows our authors to see that their document isn’t the only one
 - Gives us the opportunity to shift deadlines
 - Can relieve workload stress of us and our author as needed

Stay relevant: Just a spoonful of sugar helps the editing get done

- Our office space allows me to create fun reminders that are posted in the kitchen, by the printer, and in my office

Eight Steps to Creating a Perfect, Pain-Free* Schedule for Your Document



1 Talk to your client
If your document is driven by an Agency or meeting deadline, then it is what it is.
However, if your client is saying, "I want a memo by the end of next week!" consider responding with "I think that is doable; let me double check with our fantastic tech edit team."



2 Talk to tech edit
Five minutes!
That's all it will take to stroll down to Kristen's office and say, "I've got a document that I'd like to get out on X date. Are you guys pretty busy then or will that be doable?"
Then I can say either: (1) "We can make that happen," or (2) "We have 8 RI/FSs going out that day. Let me see if Christine is available to take on some of this load."



3 Check in with your client
Send an email or call...or do both like this lady!
Let them know it's a go and that you will send them a more detailed schedule soon.



4 Walk back to Kristen's office
Here's where things got complicated...

5 Think through the entire document process and try to avoid any last minute schedule surprises
It is important to really think through all of the steps that are involved with a document. I will use an example from a recent experience Lynn and I had. Lynn had a Phase I with a super-short turn around time. She gave the team as much time as possible to get the writing done, but it was still going to be tight. She sent an email to the team (including tech edit):

"OK, we have a May 1 deadline, so let's shoot internally for a draft report by Apr 20, which gives us time for my review, draft client review, and tech edit."

I thought this was great information for the team, but I thought we could do better.

"Assuming we are sending only a pdf on Friday, May 1, and that this is a medium-sized document, here is what I propose for the 10-working days schedule you want:

Friday, April 17 internal draft to Lynn COB
Tuesday, April 21 to Legg by COB for tech edit
Thursday, April 23 redlines to Lynn mid-day
Thursday, April 23 back to Legg to finalize
Friday, April 24 to the client by COB
Tuesday, April 28 back from client by COB
Wednesday, April 29 new redlines back to Legg COB
Friday, May 1 finalize and out the door

Two notes:
1. If the doc is not medium-sized (like an annual report or full Phase I), we may need to adjust the schedule. If it's smaller, then this is probably overkill. If it's more like a FFS or has a ton of tables/figures, we might need more time.
2. If we need to send hardcopies, this will need to be re-worked to allow for production."

Adding these specific internal and client review dates helped everyone. The team knew what was expected of them. Tech edit was able to ensure that they were ready for the document as soon as it arrived in their inboxes. Lynn was able to be available when she was needed to review redlines. The client was clear about how much time they had to review.

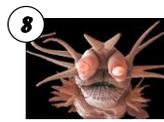
* The tech edit team cannot guarantee that you do not accidentally trip and fall on your way to Kristen's office, or that you don't pull a muscle while jumping for joy at the ease of your tech edit experience.



6 Meet your deadlines
We should work to respect our team members' time as much as we respect our client's. Sometimes you have to get sweaty in the back part of your head.
If the whole team is in the know about the agreed-upon schedule, we can encourage one another to get our work done on time.



7 Follow the Three C's
Communication, compromise, chocolate.
If a schedule is slipping, or is affected by outside forces, talk with the team (including tech edit) to come up with a revised schedule.
If that doesn't work, there's always chocolate.



8
I don't have an eighth step. Just needed to fill up the page. Look at this crazy polychaete!

Tech Edit and You

Keys to unlocking a smoother, more cost-effective, enjoyable editing experience.

HOW THE PROCESS WORKS

HELPFUL/NOT HELPFUL

- HELPFUL** 😊 Discussing budget and expected level of effort with tech edit ahead of time
- NOT HELPFUL** 😞 Bringing up budget after a full tech edit (our standard practice) is complete
- HELPFUL** 👍 Reminding tech edit what to bill to and sending a link to the files when we haven't seen a document in awhile
- NOT HELPFUL** 🙄 Sending an email with no billing info or hyperlink to the document
- HELPFUL** 😊 Making sure titles for tables, figures, and appendices are correct in the table of contents before sending to tech edit
- NOT HELPFUL** 😞 Providing contradictory information for us to sort out or no information at all
- HELPFUL** 😊 Waiting to send all text, tables, figures, and appendices in one batch to tech edit
- NOT HELPFUL** 🙄 Sending text that is not fully written, drafts of figures that are currently with GIS, or tables that are missing data

STEPS TO CREATING A DOCUMENT SCHEDULE

- 1 Talk to your client:** If a due date is not agency-driven, consider telling your client you will get back to them shortly as to when we can deliver.
- 2 Talk to tech edit:** Let us know what you're thinking for a timeline, and we will let you know if we can do that or if we will need to bring in additional help.
- 3 Create a schedule with tech edit:** Think through all of the steps that come with document development. Tech edit can help create a schedule that includes internal deadlines. For example:

April 17	Tech QC	April 30	Client review
April 21	Senior Review	May 3	Address comments
April 23	To tech edit	May 5	Redline review
April 29	Back from tech edit	May 6	Finalize
- 4 Meet your deadlines:** Letting an internal deadline slip, even by 1 day, cuts down on tech edit's time with the document at the end. We are more than willing to provide reminders to help you guys stay on track, just let us know.
- 5 Keep lines of communication open:** If a schedule is slipping, let the team know (including tech edit). We can help you with a revised schedule.

BUDGETING YOUR TIME

Report Type	Cursory Edit	Full Edit	Production
Large Document (e.g., RI/FS)	20-40 hrs	40-60 hrs	10 hrs
Medium Document (e.g., small rpt.)	4 hrs	16 hrs	4 hrs
Small Document (e.g., memo)	2 hrs	Up to 8 hrs	1-2 hrs

Based on average docs with tables, figures, and appendices. Assumes 5 copies, comb-bound. Definitions of cursory and full edits provided to right.

CURSORY VS. FULL

Cursory: Heavy format with focus on layout and usability of a document. No reading of document. Should be performed sparingly and only for client review drafts.

Full: Cursory edit plus read-through of documents, cross-check between text and attachments, and critical look at document structure. Performed on all documents that leave Floyd/Smider.

Don't Forget!
It is important to be available the day a deliverable is due; we need your eyes for a final review. Rhyming!

Stay relevant: Market yourself and your team

- **There aren't as many ways to get ahead in a corporate editing job, especially at smaller firms**
- **Increase your institutional knowledge wherever possible to become indispensable**
 - When speaking with authors and principals, make it clear that you care about (and understand) the work they are doing
 - This will lead to them sharing the ins and outs of the project more readily, maybe even inviting you to big task kickoff meetings, which keeps you informed and ready for surprises
- **Advocate for yourself**
 - The project managers/authors/principals only know about the work you have done for them, not all of the stuff you have done for others
 - Without sounding like you are complaining, make sure that the firm knows when you are super busy or when you worked overtime and got out a huge document that you are proud of
 - Also provide recaps for principals semiannually to bring your successes and any firm-wide issues to their attention
- **Sharing is caring**
 - Talk up your team so they get the recognition they deserve
 - Provide public praise to authors who work with you and make your life easier

Stay relevant: Make your presence known

- **It is very easy as editors to bury our heads in our work**
 - Leave your desk to talk to authors about project logistics, specific global edit questions, or even the weather
 - Join committees and help plan events
 - Provides an opportunity to get to know your coworkers



Work With the Team: Sometimes, you just have to be like Elsa

- **Let it go**

- Although I don't let the authors know this, I am always making choices about what is the most important thing to do in a document
- In a dream world, we get it all done; however, if there isn't enough time, I decide what is most important
 - For some authors that is editing, because I know they are not the best writers
 - Sometimes, I need my formatter to really make the document pretty because I know it's going to be printed out and handed to 20 people who aren't going to read it but will trust it's good if it looks nice
 - Other times, I want the time to be spent on the TOC and making the document usable, because it is going to be used in a working meeting
 - We are so busy once in a while that I talk with the author and decide to send it out as is, with a note to the client that says "this hasn't been edited"

Work With the Team: Dealing with conflict

- **There are times when you just can't come to agreement with an author**
- **Come in with solid reasoning**
- **Here are some examples of how you can deal with an issue**
 - Unbending: "Because our style guide says so"
 - Educational: "Because by saying it the way you want to say it, you are actually saying X"
 - Requesting: "Because it is too much work for the editors to remember separate style rules for each of our projects, please help us by sticking to the style guide"
 - Sassy: "You said it this way in the last eight documents, why would you change it now?"
- **The way you respond might differ depending on the author, but your reasoning and determination must remain the same for all issues with all staff members**

Work With the Team: Tricks for critical conversations

- It can be especially difficult if there is a feeling of superiority from either member of the conversation or if either person feels their work is under attack
- Come into the conversation knowing what you are willing to give in order to get what you really want
- Humanize yourself and the author—start with a general conversation
- Get on their level—sit tall to match eyes, stand if they come into your office space and are standing
- Power poses
- It's okay to say “We are having a hard time resolving this, and I am letting emotions cloud my thinking. Can we reconvene later to come to an agreement?”



A high-level (and mediocre) author keeps rejecting your edits and complaining that you are making changes that don't matter to the reader. Upon review, you confirm that your edits are necessary, but you cut back on the number of comments in the document in the hope that this will lessen the feeling of having bled all over the page. The author continues to complain. Time for a critical conversation.



Editing does not have to be an afterthought

- With a bit of daily focus, you can keep yourself in the loop, which in turn helps you control your workload
- Many firms allow for employees to make improvements to workflow, but some have very stringent rules around protocol
- Every work environment is different
- What are other tools you have used to bring your editing team to the forefront?



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