Creating a Pro-Editing Culture in a Corporate Environment

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Presented by
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Floyd | Snider
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#ACESCorporateEdit
Today’s Presentation

Goals for today’s presentation

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

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

<table>
<thead>
<tr>
<th>Then</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stringent editing system</td>
<td>Open to team needs</td>
</tr>
<tr>
<td>Inconsistent requirements</td>
<td>Clear system for submittal</td>
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<tr>
<td>Assistance-based system</td>
<td>Equal teaming process</td>
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• Everything I did to change my environment involved keeping visible and being needed in the workplace
  o Make things easier for the authors (and yourself)
    – Department management
    – Scheduling
    – Providing information to authors
    – Corporate initiatives
  o Stay relevant
  o Work with the team, not against them
### Tools and Tactics

#### 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

<table>
<thead>
<tr>
<th>Project</th>
<th>Document</th>
<th>Contact</th>
<th>To Edit</th>
<th>Due</th>
<th>Notes</th>
<th>First Mention</th>
<th>Issues</th>
</tr>
</thead>
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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

<table>
<thead>
<tr>
<th>Due Date</th>
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<tbody>
<tr>
<td>PDF to author for final review</td>
</tr>
<tr>
<td>PDF to final QC</td>
</tr>
<tr>
<td>Final redlines to editing department</td>
</tr>
<tr>
<td>Redlines to author</td>
</tr>
<tr>
<td>Full edit/format</td>
</tr>
<tr>
<td>Senior review</td>
</tr>
<tr>
<td>Technical QC</td>
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</table>
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

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

• Review their budgeted hours for editing and then provide feedback
  o 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
  o This will make them more confident in their writing
  o It will also help avoid some of the more common errors we correct day in and day out
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
Tools and Tactics

Stay relevant: Keep finding ways to drive your point home

• Present to staff regularly at staff meetings on various topics
  o Levels of edit
  o Best practices
  o Quality control in data and historical documentation
  o How to “write good”

• This provides refreshers on our policies and keeps the editing team at the front of their minds
  o How to communicate with the editors
  o 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, this 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. Any guys pretty busy then or will that be doable?”
   Then I can say either: (1) “We can make that happen,” or (2) “We have a 4/21出去ing 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 get 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 T/24 with a super-short turn around time. She gave the team as much time as possible to get the written done, but it was still going to be tight. She sent an email to the team (including tech edit):

   "Out we have a May 2 deadline, so let’s shoot internally for a draft report by Apr 20, which gives us a 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 Monday, May 2, and that this is a medium-sized document, here is what I prepare for the 10-week day schedule you want:**
   
   **Friday, April 27:**
   - Internal draft to Lynn COO
   - To 404 for tech edit
   - Redline to Lynn red day
   - Thursday, April 24
   - Redline to Kristen
   - Friday, April 25
   - Back to Lynn COO
   - Monday, April 28
   - Review tech edit
   
   **Friday, May 1:**
   - Finisher and out the door

   **Two notes:**
   1. If the doc is not medium-sized (like an annual report or full Phase II), we may need to adjust the schedule. (It’s smaller, then this is probably ok. If it’s more like a T/25 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 inbox. 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.

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 slippin’, 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. Don’t have an eighth step. Just needed to fill up the page. Look at this crazy polyhedral!

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**Tech Edit and You**

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

**How the Process Works**

**Helpful/Not Helpful**

**BUDGETING YOUR TIME**

**Steps to Creating a Document Schedule**

**Report Type** | **Cursory Edit** | **Full Edit** | **Production**
---|---|---|---
Large Document (e.g., R/is) | 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

**Cursory vs. Full**

Cursory: Heavy format with focus on tables, appendices, and internal references to missing data or tables that are missing data.

Full: Not cursory in nature with focus on tables, appendices, and internal references to missing data or tables that are missing data.

**Agency or meeting deadline**

**Back from tech edit**

**Tech Edit**

**TechEdit**

**#ACESCorporateEdit**
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
  o 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
  o 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”
Tools and Tactics

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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