

# What to Expect When You're Expecting Edits

*A quick guide to surviving  
the business editing process*

**Lorena Bueno**

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# What problem are we trying to solve?

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Creative and business writing projects are designed to solve specific problems. This short guide is designed to help you solve problems you may have with the editing process.

Until you learn how to be edited (and in turn, how to edit), editing will continue to be an elusive, mysterious, and scary process you avoid, skip, or grudgingly do ... but loathe.

## How do we talk about editing?

Our goal is to help you get comfortable in and with the editing part of your projects. We do this, in part, by breaking down and demystifying the major aspects of the editing workflow.

You need to know what the other gals and guys are doing and why. We'll guide you through the basics, while giving you tips to get and give the kind of concise, targeted edits all projects need.

## Editing is central to the process.

Writing and editing are intertwined parts of creating something public, but until you're ready to release it, it's your secret, your idea, the result of your very personal processes. Seeing, *anticipating*, and **dreading** the idea of your work going public for that first edit can drive even the strongest to drink ... until you learn **how to be edited**.

## Every Day Editing: a skill you've honed your entire life.

You select and send good articles on a topic to friends – but not every article on that topic. (Well, maybe some of us send **all** the memes.) You're building that edit muscle every time you think before you speak, when you Marie Kondo your junk drawers, or make a bass-heavy play list for leg day at the gym.

## Editing is an essential business and creative skill that we're already using.

All content creation is a collaborative process with seen and unseen efforts.

We agonize over texts or work emails. Then we reach out to colleagues – and they magically manage to find *just* the right way to get your point across.

You don't sweat getting and giving the small edits; we'll help you stop sweating the big ones, too.

### *Where are "we" coming from?*

Collaborative experiences with editors and writing mentors of every stripe have gone into this guide. "Our" goal is to teach you how to approach editing scenarios from any angle, maximizing you and your team's experience and minimizing the pains.

From me, on behalf of all the editors and mentors I've known before ... you can do this. We can do this. Let's go!

~ Lorena B

# How edit-dready are you?

Does the appearance of a pair of red lines freak you out? Or do you know it means you should change the text to small caps?

- If this squiggle is familiar but annoying, cool beans! So this isn't your first rodeo. Let's go through a bit of the edit process, and give you tips for survival. No pain, no gain — is a lie. Less editing pain, more creative gain!

brown quick fox

- If you have no idea what those three lines mean, no worries! We'll tell you where to find out more (spoiler alert: the internet). We mostly talk about collaboration in the digital realm, but cover the basics well enough that no one will even suspect this is kinda new to you.

the internet as we know it.

- If you know what **stet** means, hooray! You get to choose your own adventure. Skip around, skim, even mark us up. Skip ahead to troubleshooting and advanced tips we've layered in, or reach out and teach us something.

the internet as we know it.  
stet

# Just what kind of editor do you think you are?

You already know you've got a bit of every day editor in yourself ... but are you growing into more of an editor? What kind could you be?

→ *You might be a "classic" editor if:*

You're good at writing, and someone's asked you to "look [*something*] over, since you're pretty good at this stuff."

**Problem:** You're not sure what they want, they don't know what they want ... and all the guessing stresses you both out.

→ *You might be a "content" editor if:*

You're an expert at something, and you've been asked to "take a look at [*something*] about [*a specific subject matter*], since you're the expert ....

**Problem:** You're not a classic editor, and the request really leaves you at a loss. What do they want from you? When should you stay in your lane, or step outside of the zone? What *is* the zone?

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*Solution for all: Read on to learn how to figure out what kind of edits your colleagues want ... and how to get those edits to them.*

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# Unidentified Editing Objects

The first few documents I submitted for editing came back a red-slashed mess.

*“I'm a terrible writer, and should just go back to retail management.”*

I decided editors were gods that walked the earth, and I had angered them. I should hang up my keyboard. Just face up to the fact that I'd never have a writing job in this town again.

But it turned out I just didn't know **how** to be edited. I'd thrown an *Unidentified Editing Object* at the feet of the editing gods, and they had no idea what to do with it.

Basically, I helped them edit it wrong. I didn't know what I didn't know.

I didn't know how to put the content first. I didn't understand that you have to provide context for editing success. Though I still struggle with it a bit today, I had no idea then that I had to do these things, or even how to do all this while leaving my ego the heck out of it.

The good news is that once you've got the basics of putting your content first, and into context, you'll never ship out an Unidentified Editing Object again. The ego-chill will take practice, but you'll get better.

Every time you cycle through editing, you'll grow, refine, and learn to trust a process. You'll have your process. One that works for you, whether you're the editor or the content creator.

# We are not alone.

So you're the idea gal, or the writer, or both. You've had this bit of content in your brain a while now. It's been simmering, with you when you wake, while you brush your teeth, as you drift off. You mentally review your notes or a client brief constantly.

You've changed an adjective six times and reordered the paragraphs five, in between clicking Pinterest recommendations and binging a TV series for "background noise". You're holding it close to your brain and heart for "one last look" ... but it's time to send it off. You have one worry on your mind:

What will it look like when it comes back?

## ✘ Worst case scenario:

*Torn to shreds, chopped up, awash in red marks, paragraphs in disarray.*

## ✔ Better result:

Edits that are **targeted** and *thoughtful*. She's redirected your content, included suggestions to shore up weak points, and balanced your strong points.

If you're doing the edits, how do you feel about the project before you? Do you understand the problem it's trying to solve?

Before you've even sent it off, you're wondering:

*What will your edit suggestions do?*

*How will the content creator react?*

### ✘ Worst case scenario:

The content creator freaks out. You did something she didn't want you to do.

Maybe you edited a section someone else edited. Or your edits messed up the formatting of her document, and you've wasted a lot of valuable editing time.

### ✔ Better result:

The content creator provided **context** for the document. She told you *exactly* what kind of edits she needs you to do, and what software program to use.

She made a list of problem areas you need to look **closely** at, and marked sections you should avoid. You know how to get edits back for quick and painless incorporation.

↔ This exchange of information is what you'll establish as part of any good editing relationship. Every edit request should have context and defined expectations. Egos are checked at the door, and you all **put what is best for the content front and center**.

## Define the edit process: Round 1.

If editing were as simple as ship, edit, return, accept, we wouldn't be 1,300 words into a guide on the editing process. At a high level, it is exactly that, but realistically, you need to get deep into melding everyone's minds together on the editing process.

Every edit request should be accompanied by an editing brief. This is generally a greeting and edit request, that includes a short, bulleted list that provides **context** for the edits. Use this brief to set **expectations** for this round, and give a reasonable deadline.



If you need to provide some information to put egos at ease, include that as well. This might be a comment about understanding that they are busy, but their input is very valuable. Or ask that they point you at another expert if they can't help you this round.

Wrap up your edit request email in a warm, positive tone, and let them know how to reach out to you with questions.

## Provide Context

**Content Creators:** Tell your editor a little bit about the project. You usually can find this information in your client or project briefs. (In more technical organizations, it might be lurking in user stories.) Don't send *those* detailed briefs, just summarize essential information.

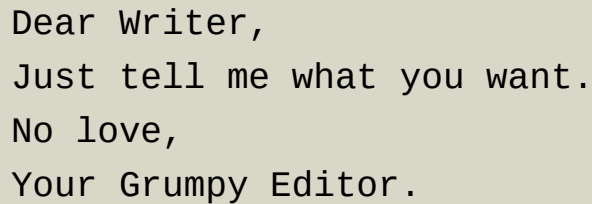
- What problem is this content trying to solve?
- Who is the audience, and what is their knowledge or interest level?
- Are there primary and secondary purposes for this content?
- Is this a stand-alone item, or part of a larger whole? (If part of a larger whole, provide enough information to give them an idea of how this fits)
- Is there a style guide, brand guide, or voice guide to follow?

Hey, Editor, here's the second Mars blog post for copy edit.

This time, we are looking at construction materials on Mars. The audience is still middle grade kids (ages 11-14), with some knowledge and interest in Mars. We're doing one a month for 2018, and the outlines are linked on our editorial calendar. The first final post is attached for context.

Track changes are on, I'm still using Word 2007, so you can just make changes inline. Holler if you need me. Thanks!

**Editors**, talk to your content creators before you dive in if you don't have the info you need. You can't edit effectively if you don't know who this document is for, or what it's supposed to do.



Dear Writer,  
Just tell me what you want.  
No love,  
Your Grumpy Editor.

## Set Expectations

**Content Creators:** Give your editor some kind of heads up on what you need from them for each round. Even if you've gotten a long-term editing relationship going as good as McCartney and Lennon, it helps to tell them. This also lets them bake it into their schedule appropriately.

**Explain what kind of editing this content has been through, needs, or both.**

*Draft review, content review.* You're asking your editor:

- Does this flow logically, are there holes?
- If the editor is an SME, indicate what sections they should check for accuracy.
- Depending on the level of completeness of the draft, this may be a developmental editing pass, bringing shape to a lump of clay.

*Draft review, copy editing.* You're letting your editor know:

- This has been through a content edit and an SME has checked the accuracy.
- Can you see: Does this (still) flow logically? Have things been scattered a bit in the content review process?
- If applicable, you want to know if she thinks this piece fits appropriately in the larger project.

*Pre-layout review and proofreading.* You're letting your editor know:

- This is ready to go to layout. Check grammar, spelling, and citations if applicable.

*Layout proofing (or DTP).* You're telling your editor:

- This is ready to go to press – is the content ready to go?
- Is it laid out well?
- Did anything go really wonky during the layout process? (Do the links work for online documents?)

**State exactly what you do and do not want the editor to do.**

- An SME doesn't usually need to check grammar. Defer grammar questions to your copy editor's expertise, but encourage your SME to speak up if a change you make materially affects the meaning of something they wrote.
- If you only need the SME or editor to edit a specific section, consider sending her just that piece. If you must send the whole document, clearly mark the parts you want them to edit, using their name attached to the sections to make it easy.
- If you are including previously edited sections for context, flag them as **"DO NOT EDIT"**. This can happen if you're adding a feature or freshening dated content.
- If you are including not-ready-to-edit sections to provide your editor some context, flag these sections as **"DO NOT EDIT"**. This can happen if some sections contain information not yet finalized, or are in review with another editor.
- If you are including quotes or pseudocode, these sections do not need to be edited. Depending on your organization's workflow, you may need to mark these for verification in a separate pass. Mark them for that workflow if this is not that pass.

**Editors**, you probably have a lot of editing (or other work) to do. Save time: reach out if the content creator doesn't tell you what they want you to do.

## Getting into the details

**Content Creators:** Don't overload the edit request email with questions. If you have more than a couple of specific questions, flag them in the document (calling out editors by name, if it helps). Include a note in the email:

I've got a few questions in here about *widgets*. I've flagged them with your name in comments, please take a look and respond.

Give instructions on how to return comments. Options you might offer include:

- Make edits directly in the document.
- Print it out, mark it up, scan it back.
- Write up an email with answers.
- Get together on an editing call. Talk, share screens, get it done.

Let them know how best to reach out to you during the process. Let them know they can ask you questions, ask for clarifications, or just get on a quick call to suss something out.

Give a clear deadline.

🗨️ **Editors**, we're repeating a familiar chorus here, but if this information isn't available to you, **ask for it**.

Yes, it takes a up little time now. But you can use this as a way to teach your content creators an efficient way to work with you, and with future editors.

## Ego Tips

Into every content creator's life, some ego must call. No, it's not easy to write something and put it out there.

***Even with practice, you might want to take some edits personally.***

Remember to ask yourself if the edit is good for the content. If not, figure out what you disagree on, and work with your editor.

### ✘ Sometimes the shoe's on the other foot:

*You're working with someone to bring their idea to life, and they "can't believe what you've done to my idea"...*

### ✔ The better approach might be:

Start with an outline.

*"Here are the main concepts, and this is an order that seems to make sense."*

From there, move on to fleshing out the "big changes." Emphasize how the target audience can now understand it better. Show how a change or different approach resonates with the underlying theme.

### ✔ Another approach might sound like an apology:

Give them a positive picture to start with that shows what your edits are doing.

*"Here's the doc, and let me explain. Think of this as if I came through and helped you reorganize your garage or kitchen ..."*

I've used this tactic on projects where I've been given a freer editing hand than the content creator might have expected (usually at the direction of his boss). I use it more frequently with SMEs who can put information down on paper, but not **together** in a way that flows appropriately for the audience.

If you have an SME who might not understand that you're reorganizing their document to improve it, this helps them open up to the idea. Use a metaphor they might get (such as reorganizing a kitchen or decluttering a garage) to help them accept the **idea** of change before they read the change.

✓ **Edits might age well:**

And last, but not least, is time.

I often find it helps to step away from work while it's being edited. Find something else to do.

Then, step away again after I read the edits ... but before I implement them. Turn track changes on, or off, and give yourself a mental distance from the changes. The edits might prompt you to make *another* change **that's even better**.

If you're working on a series (articles, blog posts, press releases), go back and look at your old ones. Remind yourself how far you've come. Find old threads you can weave into your current projects. Make it all shine.

## Round two, and beyond.

The editing process is sometimes simply one and done. More often as you're getting started or establishing relationships, it's a series of rounds. Once you've got the first pass done, subsequent passes can go faster.

## Working with all editors

Take the edit request email you sent out the first time, and use it again – it's practically ready to go. Take out the bits your editor doesn't have to worry about this time, add in any new things she should look at, attach the new draft, and send.

If it's a full review (for example, moving from copy edit to proofing), send back the document with all of the changes she made (and you agreed with) "accepted" in track changes. If it's a partial review, mark the content she should edit clearly.

## Working with a classic editor

As a content creator, you might just accept all changes from your editor, or pick and choose. Depending on your relationship, some edits may require negotiation. No one wants to edit the same bit back and forth over and over again.

Have a chat, work it out. Over the long term, you'll get used to each other's working styles. If a direct chat isn't an option, leave her a comment. *"I didn't take your suggestion here because XYZ."*

If she's also your developmental editor, pay specific attention to her edits. Learning why she makes them will help you absorb the house voice and style of larger organizations.

**An accurate and updated editing brief is a *crucial* part of these relationships.**

- Your editor may work on different parts of the same project as you bring it together. You don't want her to do the kind of edit she'd do on a lift note as she does a special offer card.
- Your document might be repurposed for a different audience. "I've already edited this ..." becomes "This one is tweaked for decision makers instead of the team that will use this product ..."
- Time may pass between edits; time can make it difficult to recall the details of a previously partially completed projects.

## Working with a Subject Matter Expert (SME)

Typically, SMEs are experts in whatever you happen to be writing about. They may review everything you're writing, or only one segment of your project. You may work with them one on one, or email an edit request to many at the same time.

These factors change the shape of your edit request, and what tools you employ to get edits back from these experts.

**Your edit request email will have the same general styling as for a classic editor, but you'll need to break things down further.**

- Yvette may be an expert in industrial wiring, but Callie is the safety expert.
- Mention this in your email, and ask each to review the content from their SME perspective.
- This allows them to focus on what you need. They start their edit pass knowing "the other expert" has got you covered for anything that might be out of their usual zone of expertise.

**If you use track changes (highly recommended):**

- Accept (or reject) SME changes in the document. Save a version you can then further edit.
- After you make your further edits, "accept" any edits they don't need to review again. Their second pass will only be the important changes.
- You may need to gently remind them you have an editor if they send grammar suggestions ... thank them for catching bloopers, but dissuade them from spending significant time on wording that's possibly questionable.
- If they are only editing one part of a document, only send them that part, or simply state, "Hey, this is all of Chapter Three, but I only need feedback on the new feature your team added, **Encrypting PDFs.**"



## **If you use comments (highly recommended), be clear in their text.**

- Making a note to yourself? Put your name as the first word in the comment. Your SME can ignore these.
- Asking a question or leaving a note for a specific SME? Put her name as the first word in the comment if you let her know in your editing brief to watch for those.
- As you go through the rounds, reply to, “accept” or “resolve” each comment. Good comment hygiene keeps your SMEs from wasting time going over old grounds.

### **Track Changes, Comments, & Editing Marks**

The internet is a wonderful place. Back in the day, I had a stack of books as tall as a footstool. Each was dedicated to a different writing software, editing guide, or technical specialty. Now, everything you need is just a click away!

#### **Track changes and comments**

If you don't know how to use track changes or comments in **Word**, **Google Docs**, or other software, you can look it up. You'll find blog posts, knowledge bases, and short, free training videos on most every function you'll need.

If your SME doesn't know how to use these tools, take the time to put together a quick list of short videos that show him exactly what to do. Make sure the videos are close up and clear, and that the speaker is understandable. Bonus if you find one with a transcript or closed captions!

#### **Editing marks**

If your editor prefers print outs and hand penned editing marks, there's no book you need to buy (unless she suggests one to help you grow and understand the rules she's using). Do a search on "editing marks" and print out a few reference sheets. Share them with your editor so you're working from the same page. You'll get the hang of it.

# And now, we wait. Or work.

With a clear editing brief, it's time to jump in. Happy editing!



## Accepting change(s).

The editing pass is done. It's time to open your document and see what's changed. Take a breath, and remember **the content is your priority**. You and the editor are working to see that it is presented clearly, smoothly, and accurately.

Maybe you lost a favorite phrase or reference. Maybe the changes are spectacular. Maybe they aren't that great – so take this as a learning experience.

But bear in mind, **these edits are not a personal attack**. These edits are cheers and a guiding hand, support from a team member. A team member who wants this project to succeed as much as you do.

## Putting in the work: What an editor does.

As an editor, the first priority is to do what is best for the content.

### **Classic editors, apply as applicable:**

- If this piece is meant to start with a summary and broaden as it goes on, does it?
- Are the topics in a logical order? Is anything missing or incorrect?
- What level of corrections should be made “visible”? (More if teaching the writer)
- Is the voice clear and the same throughout the document?
- Is the language used appropriate for the intended audience?
- Grammar? Layout?
- Does the content meet the goal overall and solve the problem it is designed to?

## **SME content editors, apply as applicable:**

- Does your section of content flow well with the content before and after it?
- Is it presented in a logical format?
- Is anything missing or incorrect? While you are not looking at grammar, ensure the content creator or writer is using accurate terms, and that her edits don't change the intent of what the product does.
- Is the language used appropriate for the intended audience?
- Have you answered all of the questions content creators and other editors have posed?

Return changes ASAP, in the format you and your content creator have agreed on.

# Keeping everything straight.

As an editor, it's pretty easy to keep everything organized. Put a copy of the document in a folder, make an editing version with your initials in the title, and have at it. Rinse and repeat for subsequent rounds, using dates or version numbers as requested by the content creator.

As a content creator, you may have many things going out at once and to a variety of people. If you can avoid that, please do; it can be a nightmare to manage. Either way, do what you can to keep versions straight. Options include:

- Put documents in source control. This is usually an option at bigger organizations with Git, TFS, or SharePoint (with version tracking enabled).
- Save files in a folder. Decide on revision numbers or editor initials to keep versions straight. Optionally, create an "old" folder for inactive or outdated versions.
- Turn on track changes and lock appropriate features down. Advanced Word users can:
  - Make it impossible to make any changes that aren't tracked.
  - Limit the ability of Word to exuberantly make changes to the underlying styles.
  - Merge document changes automatically, if you trust Word to do it right.

## 🔒 If you decide to lock your Word documents:

Pick a password and stick with it. Share it with someone in case you decide to move to Antarctica without notice. This is not a “security” feature, but it keeps Word from doing what it likes to do, i.e., make your document formats run rampant.

# What kind of edits should you make “visible”?

In working with a large number of SMEs, I’ve found the “slashed to bits” look can be overwhelming for them. The sheer number of edits that go into fiddling with a paragraph can be daunting – and a lot of them simply don’t want to see that.

As we plan our first trips to Mars on ~~earth~~Earth with the Mars Desert Research Station (MDRS) of the Mars Society, the next few missions on Mars will give us more data on the clay deposits of our near neighbor. As the data comes in on the ~~discovered~~clay, we can add clay structures to our plans of more permanent structures.

What can we ~~can~~ do with clay?

As you get to know your classic and SME editors, you’ll get a feel for what to make “visible”. Some of my collaborators want me to turn off all editing marks and accept all changes, first. Then I’ll go through and manually highlight or flag the items they need to focus on or be aware of.

plan our first trips to Mars on Earth with the Mars Desert  
rch Station (MDRS) of the Mars Society, the next few  
ns on Mars will give us more data on the clay deposits of  
ar neighbor. As the data comes in on the ~~discovered~~ clay,  
1 add clay structures to our plans of more permanent  
ires.

o with clay



**loren**

This word is on the  
“Do not use” list  
for this channel.

If you don't have a classic editor for a project, you'll be making a lot of your own edits before you hand it off to an SME.

But if your SME only wants to worry about content, don't distract her with the six words you moved one by one to make a new sentence. Accept any edits you don't want her to look at, hide your comments, and let her focus on the changes that are important to her.

Desert Research Station (MDRS) of the Mars Society, the next few missions on Mars will give us more data on the clay deposits of our near neighbor. As the data comes in on the ~~discovered~~ clay, we can add clay structures to our plans of more permanent structures.

What can we do with clay?



**loren**

Yesterday's meeting changed the blog entry format to start with the first premise as a question.

## What do you want edits to look like?

Every writer has their preferred way of editing. Some SMEs don't like to see all those red lines in a document because they can't "filter" it out to read the final version.


**Q Tip one:** You can change the color of the edit lines to be any color you like. My SMEs find blue soothing, and I have a preference for purple. 😊


**Q Tip two:** Only show comments and full markup if the audience really needs to see this. Many find full markup distracting: they can't follow the edit train of thought.

We've included a couple more visual examples below. Figure out what works for you, and make a sample you can use to ask your editors what they want to "see" when you work on a document together.


All inline edits, track changes on, Word comments

**N**ow **b**efore we leave this point, an important **p**oint**n**ote: These are our observations as researchers. They cover hundreds of millions of people, from all races and walks of life. The people and their reportsy are ubiquitous. We have taken them in and measured them as best we can with the tools we have. We don't understand what all that we are see, but we are building the blocks we need to get there.

 **loren**  
We need to reinforce our position and what level of authority we are speaking from.

 **loren**  
Can we get a citation for this in the bibliography?

**loren**  
**Water and Sanitation in the World's Cities: Local Action for Global Goals**  
By United Nations Human Settlements Programme

 **loren**  
This is implied within context, but we should include it here as foundation for the structure this book provides.


This is how I usually work, with everything visible so I know where I started and what changes have been made. I accept changes later, and resolve comments as needed.


In this example, the first and last comments are developmental. We made the language more formal for this audience, and established the author's authority.

The middle comments are more copy edit notes; don't resolve the comment until the bibliography is completed and checked.

All inline edits, track changes off, Word comments


Before we leave this point, an important note: These are our observations as researchers. They cover hundreds of millions of people, from all races and walks of life. The people and their reports are ubiquitous. We have taken them in and measured them as best we can with the tools we have. We don't understand all that we see, but we are building the blocks we need to get there.

 **loren**  
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 **loren** April 20, 2012  
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 **loren** April 20, 2012  
**Water and Sanitation in the World's Cities: Local Action for Global Goals**  
By United Nations Human Settlements Programme

 Reply  Resolve

 **loren**  
This is implied within context, but we should include it here as foundation for the structure this book provides.

# If you've read this far, you're already ahead.

Editing can be scary. Editing can be fun. Editing can leave you buoyant or shredded. But **understanding** how it all fits together to make your work stronger, bolder, and successful will ultimately make you a better idea gal, content creator, and even an editor some day.

## The Big Red Question

Everything I write is centered around answering “The Big Red Question.” The BRQ for this guide was, simply:

*“How do we explain the basics of the editing workflow to make it less scary for idea people, content creators, and accidental editors to edit and be edited successfully in a business environment?”*

## For more information:

### The Big Red Question

This is the most basic question: **What problem are you trying to solve?**

*Bob Lewis, InfoWorld, 1999*

The question came about as users, clients, or patrons would propose highly technical solutions to problems that either had a simpler technical solution or no technical solution at all. “What problem are you trying to solve” moves the conversation to a place where all participants in the conversation can speak on an even level.

<http://thetenquestions.blogspot.com/p/official-document-ten-questions-plus.html>



## About the Author

Lorena Bueno is a Senior Information Developer and Technical Writer, and B2B content writer, specializing in SaaS technology.

She is a seasoned writing professional with a strong track record of creating robust, comprehensive technical and educational content for a variety of audiences in platform-independent formats for both online and offline consumption.

Her extensive experience includes technical writing, technical content writing, process and task analysis, content strategy, and explainer videos.

Lorena is a contributing author to the forthcoming collaboration:

*Why Didn't Anybody Tell Me This Sh\*t Before?*

[TweakThisNotThat.com](https://TweakThisNotThat.com)

