

## **“Would You Take a Look at This?”**

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A colleague asking this question usually has a draft document in hand, ready for you to review. Sometimes, the writer adds a comment: “This is going out by express mail this afternoon!”

The above scene is one we’ve all experienced. Notice that the original request/question sets no priorities. The writer likely thinks that review priorities are obvious. Rarely does a writer ask a reviewer to look at a specific topic or section. And almost never does the reviewer have a list of clear quality standards to guide the review.

Reviewers are either colleagues or a manager. Their roles and responsibilities are different, but most of the following recommendations about the review process would apply to either colleagues or a manager.

Document review is a complex and unruly process because writing itself is complex and unruly. Writers struggle to discover ideas and then to capture these ideas in words. Review processes are also complex because they rely on vague managerial and organizational assumptions (rarely written down) about what is good writing.

Successful reviews have these features:

- **Clear standards for content and for writing (both written down if possible)**
- **A well-structured process for making and recording comments and revisions**
- **Agreement about the reviewer’s and the writer’s responsibilities**

The following text discusses these three principles for good document reviews. The text ends with a reminder that document review is a people process. Writers develop a strong personal ownership as they work on a document. Thus reviews of a draft document should always take the writers’ feelings and intentions into account.

Document reviews should be early and frequent, whatever their nature and whoever is involved.

Without reviews, quality documents are unlikely, perhaps impossible.

### **1. Clear standards for content and for writing (both written down if possible)**

Written quality standards for business, technical, or environmental writing do not exist in many instances.

Occasionally, a manager has told me that, yes, a company (or agency) has written quality standards. Most often, the cited standards deal with superficial features of spacing and format. The cited standards don’t cover the content and phrasing the actual ideas.

An example of such superficial standards was a “style manual” for a major California utility company. I had been asked to design a training program on writing for their senior technical and managerial employees. As part of the diagnostic phase, I met with the internal committee that maintained the company style manual. The committee was concerned that all letters and memos (this was in the pre-email era) look the same. The key feature of concern was a universal 10-space indent for all paragraphs (instead of the usual 5-space indent taught in typing classes). I assured them that I would use 10 spaces in all sample documents.

The utility’s style manual covered only format issues, such as the 10-space convention or how many lines should separate the date in the heading to a letter from the inside address. The manual said nothing about the words and phrases that went into the individual letters or memos or about ways to organize complex technical information.

What sorts of quality standards apply to actual content and the words and phrases recording this content?

The following are two possible quality standards for content within documents:

### **1. Use informative subject lines, headings, and graphics.**

## 2. Open sections and paragraphs with key content (especially conclusions and recommendations).

As with any general quality standards, they only become usable (and understandable) in light of examples.

Examples for the first standard would be like the following:

### These

- The Turner Contract as an Example of Staged Payments
- Prior Hydrological Studies of the Cripple Creek Watershed
- Subject: Recommend that the deadline move from August 05 to January 06

### Not these

- Example
- Background
- Subject: Recommendation

Examples of the second standard would include parallel passages of text. In the one version (preferred), the main conclusion or recommendation would open the passage. Also, paragraphs would open with the main content points. The parallel version (not preferred) would lead up to conclusions or recommendations.

The two preceding quality standards are just two of the standards possible for the actual content in documents. Such standards are the basis for Shibley's generic training sessions on clear and effective writing.

Other types of content standards are also possible. In an environmental context, for example, one standard for National Environmental Policy Act (NEPA) documents would be the following:

- **Open Chapter 1 with a summary of the agency's Proposed Action.** (Also remind

readers that Chapter 2 will present a detailed description of the Proposed Action.)

Quality standards do exist for certain environmental documents, but the standards are often general, even vague. One NEPA standard, for example, is that all documents must include a no action alternative, but documents vary widely in just how detailed and specific to make the no action alternative. Such environmental standards (actually legal minimums) now appear on content checklists for NEPA documents, but as in the no action example, legal minimums do not tell writers exactly how to capture the essential information nor how to capture such information in a quality document.

All of the preceding standards (the two generic writing standards and the environmental standards) should be in writing and available to both the writer and any reviewers to use as they work with any document. When the writer asks for a review, both the writer and the reviewer know what features the reviewer will be looking for.

Without such a list of writing standards, reviewers start reading a document without a review strategy. They initially stop when they spot an obvious problem. Such problems are usually a missing comma or a misspelled word. These problems are always the first to be mentioned because they are easy to spot and because they are obviously right or wrong (the dictionary or the grammar book is the written standard).

## 2. A well-structured process for making and recording comments and revisions

Shibley consultants usually recommend that review comments be exchanged in a face-to-face meeting between the writer and reviewers. This format allows all participants to hear everyone else's comments and suggestions. Participants also can indirectly begin to define what the organization or group sees as a good and thus acceptable document.

The organizational benefits of a face-to-face meeting are perhaps the most important reason for our recommending oral as opposed to written comments. All reviewers learn what others value as they look at documents. This perspective is a good one for a writer to have because writers often have a poor vision of the final audience for a document.

A written record of all comments is still important even if their origin is in the oral discussion of document during a meeting. One person, perhaps even the writer, should be responsible for recording each substantive comment and suggestion. As appropriate, the person recording ends the session with a review of what each person might or should contribute to the next version of the document. In some instances, reviewers have no responsibility after the oral session. In other instances, reviewers might volunteer (or be appointed) to rework a certain section or paragraph.

Written comments, including some rewritten passages, are a common option to the oral session discussed above. Written comments can be a good supplement or follow-up strategy to an oral session. The oral session can cover broad conceptual problems, such as the appropriate level of detail and the overall organization. Written comments can record all the minor problems, such as unclear wording, misspelled words, or incorrect punctuation.

The writer should choose the review process before asking reviewers to look at a draft document. This choice should reflect what the writer hopes to gain from the review.

Writers should also remember that written comments can be time consuming to prepare and are often frustrating to interpret. A 12- to 15-page document might require as much as a couple of hours for the preparation of written comments. In contrast, an oral review session on the same document should take no more than 30 minutes (including 10 minutes for an initial quick reading by the reviewer of the document).

Another problem with written review comments is that the writer often has to collate comments from multiple reviewers. This is time consuming and often frustrating when reviewers recommend contradictory revisions.

The preceding observations about written comments apply both to hard copy versions of a document and to electronic versions.

All reviews should be courteous, whether done orally or in writing. After all, a writer has usually developed a strong feeling of ownership after hours or days working on a draft. Comments from reviewers are often hard for a writer to accept, especially if the

reviewers are not both courteous and tactful as they recommend changes to the draft text.

### **3. Agreement about a reviewer's and the writer's responsibilities**

Above all else, reviewers should accept that their usual role is not to rewrite every word and phrase. As the writer H.G. Wells said, "No passion in the world is equal to the passion to alter someone else's draft."

Managers should be especially wary of excessive rewriting of their employees' drafts. The more necessary rewriting becomes, the more a manager should examine his or her guidance to the writer. Most likely, the manager's writing assignment was too vague to be helpful to the employee. A vague assignment usually signals no clear writing standards (as discussed earlier in this newsletter). Or, in some instances, a manager feels that every word and phrase has to match his or her personal writing style.

Reviewers must always distinguish between changes that are mandatory (as in errors in facts or legal misstatements) and changes that would be nice for the writer to consider. Mandatory revisions are those that the writer has to change. The others are merely superficial stylistic changes.

Decisions about responsibilities depend on the writer's priorities in asking a review. Writers can ask for review of any or all of the following:

- 1. Appropriate content (such as legal minimums in NEPA documents)**
- 2. Document structure (summaries, previews, chapter sequence, etc.)**
- 3. Readability of a section or sections (headings, paragraphs, lists, and other readability features)**
- 4. Sentences (their length and flow) and phrasing**
- 5. Mechanical correctness (spelling, punctuation, and other editing decisions)**

Efficient use of reviewer's time begins when the writer chooses one or more of the preceding priorities

for a reviewer to consider. Even a skillful reviewer has trouble reviewing a draft for all five priority levels. So the writer should ask reviewers to focus their efforts.

Remember also that time spent working on the phrasing or mechanical problems (priorities 4 and 5) is time wasted if the writer (or the writer's manager) decides to make major changes in the appropriate content or in the document structure). So writers should work to settle decisions at the higher priority levels before turning to problems at levels 4 and 5.

Early reviews properly begin with priority levels 1 and 2. Later reviews move down, ending up with a late-stage proofreading for mechanical problems (priority level 5).

A writer should also be very clear about what the reviewer should provide as review comments. Usually, for example, reviewers spot errors of fact or inconsistencies in a passage of text, but they are not responsible for rewriting the draft text. The writer or writers are usually responsible for rewriting of text. Reviewers occasionally can provide sample text as in sentence or two of rewritten text. But the writer knows the potential content better than anyone, so the writer should rework the content and revise the text.

### **Review as a People Skill**

Reviews are inherently a people process. Writers, as noted above, have strong ownership of their drafts, so any review comments can likely create defensiveness in writers.

Reviewers need to be as positive and as constructive as possible, whether they are conveying their comments orally or in writing.

Positive comments include honest and convincing praise for things the writer did right. Too often a reviewer's comments orally or written start with "This was good, but . . ." and then sentence after sentence outlining problems. Nothing in this approach is positive.

Positive review comments must identify true positives and then explain clearly and carefully why the reviewer felt these to be positive. Especially in an oral session, all attendees need to hear the rationale

behind an instance of praise. In many instance, attendees may have no clear picture of what a good document looks like, so time spent defining an acceptable document is well spent.

Here is a positive review comment and its explanation:

I liked your opening paragraph for Section 2.4. It told me in the first sentence that you did not agree with the Perkins proposal. Then you immediately explained your two key reasons for not agreeing. The paragraph was an excellent preview of the detailed content in Section 2.4.

Constructive suggestions are good ways for a writer to rephrase or change a passage. Too often, review comments are cryptic: "This is not clear!" If the reviewer does not explain why a passage is not clear, the comment is itself both unclear and annoying.

Finally, reviews should never turn into a time-consuming autopsy of a document. A year or so ago, writers of a long environmental document told me that reviews were not productive, which turned out to be a code phrase for their saying that reviews were unpleasant. I asked how they were conducting reviews. They said that all eight or nine team members gathered in a room and that review comments on perhaps 20 pages would take at least a day, perhaps a day and a half. It turned out that they were rewriting as a team and that the comments were overwhelmingly negative.

The review process by this environmental team was surely not efficient, and it violated the three principles discussed earlier in this newsletter. The team of writers had no clear quality standards in mind. They (or their team leader) had chosen to use an oral review process for rewriting the text line by line. (Team rewriting is rarely a pleasant or efficient review strategy.) And they had not clearly identified productive roles for the reviewers and writers.

The result was a review process that created more hard feelings and more frustration than it should have.

Make your document reviews a productive and positive step in the writing of quality documents. Without a good review process, quality documents are unlikely, maybe impossible.



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