

Developing an Editorial Team: Tools for Sustained Success

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EDITORIAL TOOLS

New Employee Training Checklist

Recommendation
Develop a training checklist for the hiring manager and new employee

Benefits

- Ensures that expectations are clear and that all relevant topics are covered
- Contributes to editors' confidence in their managers and the organization and encourages buy-in of processes and goals

Figure 1. Example Training Checklist

Install software and tools to facilitate proficiencies in editing

- Industry-specific dictionaries (e.g., Stedman's Medical Dictionary)
- Proofreading software (e.g., PerfectIt)
- Reference management software (e.g., EndNote)
- Adobe Professional
- Word macros

Review team administrative processes

- Standard working hours
- How to request paid time off
- Out-of-office coverage
- Unexpected absences
- Remote working policies

Provide access to organizational style guides, templates, and forms

- Company templates and style guides
- AMA Manual of Style
- Work-request forms

Complete formatting training exercises in Word

- Series of training documents focused on formatting in Word
- Progression from easy to challenging
- Review and feedback on each document

Complete editing training exercises in Word and PowerPoint

- Series of training documents focused on editing in Word and PowerPoint
- Progression from short, well-written documents to long, multi-author documents
- Review and feedback on each document

Step-by-Step Guidance Document

Recommendation
Document your step-by-step process for editing a document

Benefits

- Provides staff with detailed instructions and ensures a consistent approach to editing
- Supports editors' trust in one another by following documented shared practices

Table 1. Example Guidance Document

Formatting
Tips
Use an established template with Word styles
Show paragraph marks: open Styles pane, show field code shading
Steps
Check for consistent page size, check page headers, check page footers and page numbers, open navigation pane and check capitalization of headings
Apply Word styles to all text
Run relevant Word macros (e.g., table formatting, text clean-up)
Insert cross-references to tables, figures, sections, and appendices
Update tables of contents, lists of tables and figures, and all cross-references
Editing
Style sheet and editorial log (see Figure 2)
Create a project-specific style sheet that includes any deviations from house style
Keep an editorial log of what has been accomplished on each draft of a document
Draft 1
If using reference management software, update citations and bibliography
Run a spell check
Run consistency-checking software
Perform a full edit
Perform abbreviation and reference checks
Run consistency-checking software, update citations and bibliography, run spell check
Update hyperlinks
Subsequent drafts
Review editorial style sheet and log
Format new text, including running formatting macros
Edit only tracked changes in document
Check abbreviations and references in new/deleted text only if full abbreviation/reference check was completed at draft 1
Run consistency-checking software
Final draft to be delivered to client
If using reference management software, update citations and bibliography
Update hyperlinks and check that cross-references did not break
Run final spell check
Final draft to be delivered to client
If using reference management software, update citations and bibliography
Update hyperlinks and check that cross-references did not break
Check headers/footers and page numbers throughout
Check navigation pane and tables of contents for case issues
Change date on cover page and in file name
Scan entire document to look for punctuation at end of paragraphs, formatting issues, bad line/page breaks
Run final spell check
If tracked Word version required, compare to previous version sent to client to create tracked version
Save clean Word version (without comments or tracked changes) and create PDF

Editorial Style Sheet and Log

Recommendation
List client-specific requests that depart from house style and keep an editorial log of what has been accomplished on each draft of a document

Benefits

- Increases consistency across project documents and provides a record of progress
- Contributes to editors' comfort in seeking help with workload and facilitates collaboration on a possibly unfamiliar area of work

Figure 2. Example Editorial Style Sheet

Editorial Style Sheet (last updated 9 August 2018)

Alphacalcidol (not alfacalcidol)

Chronic HPT (not permanent HPT)

Cutoff: noun and modifier—no hyphen

Abbreviations

Spell out in headings, table/figure titles, and beginning of sentence, unless study name or organization acronym

Exceptions:

- HPT
- PTH
- rhPTH

Common Document Abbreviations:

- HPT = hypoparathyroidism
- P1NP = procollagen type 1 amino-terminal propeptide
- PTH = parathyroid hormone
- rhPTH = recombinant human parathyroid hormone

Client Style Requests

- Use an en dash rather than a hyphen in ranges (e.g., 3–4 days)
- Do not repeat the percent sign in ranges (e.g., 10–13%)

Editorial Log

Document/Dates/Editor	Comments
Literature search memo	
Draft 1 6 April 2018 Margaret	<ul style="list-style-type: none"> Full edit and format of text Abbreviation check needed at next draft No references cited
Final 20 April 2018 Sinclair	<ul style="list-style-type: none"> Edit of all tracked changes Full abbreviation check
Dossier	
Draft 1 12–17 May 2018 Margaret	<ul style="list-style-type: none"> Document was edited in 4 pieces and combined at finalization Full edit and quality check of references cited with EndNote Abbreviation check needed at next draft
Final 7–9 August 2018 Alyssa	<ul style="list-style-type: none"> Edit of all tracked changes Full abbreviation check Quality check of new references cited with EndNote

Group-Specific Editing Information

Recommendation
In addition to following a company style guide, document any information specific to individual departments in your organization (e.g., industry terminology)

Benefits

- Increases editorial efficiency and promotes consistency across editors
- Supports ease in sharing work across the team and fosters trust among editors through transparent and shared expertise

Example

Hyphenation of Common Health Preference Assessment Terms

- Best-worst scaling (BWS)
- Discrete-choice experiment (DCE)
- Random-parameters logit (RPL)
- Treatment-choice questions
- Trade off = verb; trade-off = adjective; tradeoff = noun

Patient Versus Respondent Versus Participant

- Respondent:** people who respond to surveys
- Participant:** people who participate in qualitative interviews or pretest interviews
- Patient:** when, and only when, participants or respondents are being encountered through a clinical study or being recruited directly through clinical sites

Communication Examples

Recommendation
Provide examples of how to communicate with writers and project managers

Benefits

- Demonstrates how to be courteous and collaborative while also reiterating your carefully developed processes
- Supports team's understanding of organizational nuance and projects a unified editorial team to the organization

Example 1: Edit Is Longer Than Expected

I noticed that the document is [X] pages (an [X]-hour edit) versus the [X] pages (an [X]-hour edit) indicated in the request form.

Can the schedule be extended to accommodate a full edit? If not, I will perform an expedited review. Please let me know your priorities for the document. I will complete as much as possible in the time available and provide a summary of what was and was not completed.

Example 2: Return of an Expedited Edit

The document is linked below for your review. As we discussed, I was not able to complete a full edit of the material in the time available. Therefore, I focused on the following:

- Formatted the document
- Checked spelling
- Ran consistency checks
- Edited the executive summary

The following will need to be completed at the next draft:

- Full edit of text
- Abbreviation check
- Reference check

Request for Availability Spreadsheet

Recommendation
Develop a system to share work across an editing team

Benefits

- Minimizes administrative time and documents workload over time
- Illustrates a shared need for help, demonstrates trust in colleagues, and supports a team mentality

Date Added to List	Requesting Editor	Dates Needed	Hours Needed	Project No. and Description	Final Editor
13 July	Joyce	14 July	1	0304085 4 pages of tracked changes	
12 July	Leila	20-23 July	7.5	0304232 30-page first-draft manuscript	
11 July	John	26 July	2	0303965 8-page memo	Leila

Editor needed/ready now Editor needed Taken/covered

Responsibility Matrix

Recommendation
List each employee's responsibilities, document associated processes, and assign a back-up for each

Benefits

- Ensures group continuity in the event of absences or changes in roles
- Minimizes team anxiety and reinforces that support is available

Table 2. Example Matrix

Editor	Primary Responsibility	Back-up Contact	Hyperlink to Guidance Document
Amy	Management	MEDS Managers	MEDS Management Team
	Transcripts	Alyssa	How to Edit and Finalize Transcripts
	New employee orientation	Margaret	Introduction to Operations: MEDS Overview
	Contract editing service	Margaret	Working With a Contract Editorial Service
Margaret	Intranet content	Alyssa	MEDS Intranet Content
	Editing for Clinical and Medical Services	Leila	Group-Specific Editing Information
	Management	MEDS Managers	MEDS Management Team
	Contract editing service	Amy	Working With a Contract Editorial Service
Adele	EndNote	Adele	Best Practices for Working With EndNote
	Editing for Market Access and Outcomes Strategy	Daniel	Group-Specific Editing Information

MEDS = Medical Writing, Editing, and Design Services.

Regular Team Meetings and Periodic Training

Recommendation
Hold regular team meetings and provide periodic peer review and training updates as needed

Benefits

- Ensures that the editorial team aligns on purpose—providing high-quality, consistent documents that exceed our clients' expectations—and that everyone is up-to-date on happenings across the team
- Reinforces team mentality and cohesion through shared experience and direct communication

Table 3. Aligning Purpose and Establishing Team Cohesion

Goal	How to Achieve
Provide high-quality, consistent documents across the organization	<ul style="list-style-type: none"> Hold quarterly team meetings Ask specific team members to present to the group on a topic Discuss best practices across the group Managers reiterate key messages Provide periodic peer review of edited documents Senior editors review edits of other team members and provide constructive feedback to ensure editing best practices are followed; encourages development of editors Hold training sessions as needed When new editing software is introduced or updates to editing tools are made, provide training to the team
Foster team cohesion	<ul style="list-style-type: none"> Hold meetings via video Important for staff in multiple locations to feel present with the team Have ice-breaker session to start each meeting Managers hold regular meetings with direct reports (weekly or biweekly)

CONCLUSIONS

- Maximizing efficiency and quality and enabling a group of individuals to work as a team requires thoughtful training, careful documentation, and strategic use of editorial tools.
- For more information on establishing an editorial process, see Dallas and Martin, 2015.

REFERENCE

Dallas A, Martin A. Establishing an editorial process: tools for success. Poster presented at the 75th Annual Conference of the American Medical Writers Association (AMWA); September 15, 2015. San Antonio, TX.

CONTACT INFORMATION

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