

Editing plans

ENG 483, Spring 2013, Bradley Dilger

Editing plans provide writers suggestions for better matching documents to their audiences and purposes. Editing plans always:

1. provide context (for example, previous evaluations or editing passes);
2. include well-supported analysis of the documents being edited, and clear statements of goals for editing;
3. outline the editing process you recommend, making everyone's responsibilities clear, and establishing the frameworks for communication;
4. suggest action to follow conclusion of editing.

Many editing plans include:

- a timeline which highlights important milestones or due dates;
- sample documents to be used as models;
- special instructions for complex document components (such as tables or graphics);
- style sheets or similar guidelines (or reference to style manuals);
- for contract work, a detailed estimate.

The particulars will depend on your situation—your client, the documents you are working with, and your objective. Whatever content you include, ensure your plans make you look professional, organized, and detail-oriented. See the tips below if you don't have experience or coursework writing professional correspondence.

While they are usually completed for substantive edits, plans can be developed for any editing project. For long or complex documents, incomplete manuscripts, or any project with unusual printing procedures, it's *always* a good idea to put things in writing.

Remember, your editing plan will probably be one part of a larger proposal which spells out how you will work with your client — and you may have more than one plan (for example if you have more than one document).

Developing editing plans

Writing editing plans almost always involves multiple exchanges between editors and clients. For example:

1. After receiving a manuscript, you telephone your client to learn more about the audience and purpose of a document.
2. Given this information, you draft an editing plan and email it to your client.
3. After she reads the plan, you meet, discuss the plan, and make a few changes.
4. Based on this conversation, you update the plan, and send her a final version.
5. You begin editing once your client signs an approval sheet.

Start building a plan with an evaluation for your private use. Use the rubrics for evaluation provided by in the samples from Rude (pp. 239–241) and Einsohn (pp. 13–15). Build a comprehensive analysis of the documents in their current form. Pay special attention to audience and purpose. Project as much of the editing process as possible. This evaluation will help you build an editing plan—it is not the plan itself.

Given a comprehensive evaluation, move toward developing a plan which accomplishes the objectives listed above, including information relevant to your client.

Use the appropriate style and tone. For new clients, more formal prose is a must—and you will need to explain editorial terms or conventions they may not understand. Include copies of editorial marks. Explain what style sheets are and how you will use them.

If you know your clients well, and they are familiar with your editing process, that can be reflected in your editing plan—but that does not mean you leave specifics and deadlines to the imagination.

I suggest writing the editing plan as a memorandum or business letter. (Refer to the texts you used for IM 320, ENG 381, or borrow a book from me for more information about these forms.)

Tips

- A) Lean heavily on what you've learned about relationships and management from Amy and Carol—particularly Carol.
- B) I can loan you technical writing textbooks which describe how to write memos, proposals, and other documents which will be a part of this assignment. Just ask.
- C) Anderson 19 (on the course web site) includes a proposal format which is effective for presenting an editing plan. *Don't treat this as a template; customize it.*
- D) See the course web site for several sample editing plans. I can share other samples with you during my office hours or email them to you.
- E) Write your plan ahead of time so you can print, edit, revise, and proofread it carefully. Editing plans which contain errors won't inspire trust in your clients!
- F) Again, you don't necessarily need to include all of the information you accumulated while evaluating the document. Your clients need to know what's relevant to the project at hand. Include only information you think it would benefit your clients, or which needs to be reviewed for accuracy.
- G) If you've corresponded with your clients about a project, integrate the editing plan into that discourse—don't present the plan as an isolated document. For example, you might begin with, "Based on our email exchange from last week, I would like to edit the XYZ Company Annual Report in the following manner"
- H) Include contact information in your plan. Even for clients you know well, this is a nice convenience. (Most professional editors would use letterhead.)