

## REVIEW WITHOUT VIOLENCE

by

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### ABSTRACT

The review process for a technical document is a harrowing experience for all involved. Some techniques do exist however, that can ease the pains and smooth the path to a well-done and accurate final product. The responsibility for using these techniques rests with many people: the editor who solicits review comments, the technical expert who must correct inaccuracies, the interested party who has another perspective on the subject, the manager who must approve the piece. Each of these people reviews documents for different reasons and to make unique contributions to the finished document; but, some practical techniques can be employed by all of them to make the most of their contributions and, in fact, to make their jobs easier. This paper talks to and about the two protagonists - the editor and the reviewer.

### THE OMNIPOTENT EDITOR

Often, the controlling responsibility for a document rests with the editor or writer who has gathered together a draft, must solicit comments, corrections, additions, approval from other staff members, and whose task it is to pull all those contributions together into a cohesive, approachable document. I'd like to address first some points that you, an editor must consider in making the review process as successful as possible:

- 1) Selecting reviewers
- 2) Presenting the material
- 3) The "Please Review" memo
- 4) Working with reviewers - the review meeting
- 5) Resolving conflicting comments
- 6) Incorporating the results

#### 1) Selecting reviewers

First, the editor must choose the people to review the document. Some people may be on your list for policy reasons; try to find a balance when you can choose the rest. Include technical, managerial, and editorial staff, but also include your peers and novices who may provide valuable insight into the style and tone or approach of the document. If staff meetings can provide a forum for finding out who would like to be on a review list, use that opportunity; people will not usually volunteer unless they will seriously spend time on the task and you will have reviewers you might have overlooked. Be cautious about making your review list unnecessarily long. Have a purpose for every chosen reviewer.

#### 2) Presenting the material

Be sensitive to the presentation of your material. Even though it is a draft, it should be reasonably polished for public viewing. Your reviewers will spend more time on the meat of the material if they don't become intrigued by a "find the typos" or "malign the format" game. Format communicates non-verbally and your readers will enjoy having a chance to see the material in a form close to that in which it will eventually be presented; they can give you feedback on that, too. Never assume your readers are insensitive to the finer nuances of the English language. Work on the phrasing before the draft goes out - again, so your readers will spend more time thinking of additions or corrections than they will trying to rewrite your sentences. Finally, if there are sections that you know are incomplete or especially need attention, put some notes pointing that out right in the draft. Those notes can be very effective in helping your reviewers understand gaps or provide you with material you need.

### 3) The "Please Review" memo

A technical document should never be given to someone for review unless the contract is clearly stated: what you have given him or her and what you expect in return. Often the easiest way to state that contract is in a memo that accompanies the draft. A checklist of things to consider when writing that memo:

- . Include the distribution list on the memo and encourage readers to involve others they may think should see it. (This is especially important if you have a very "selective" review list or if managers wish to delegate their review to others.) This list also encourages reviewers to consult each other on points they want to clarify, rather than use the editor as a middleman.
- . Make the scope of the new project or revision clear. Point out the major areas of change or addition, or clarify the intent of a new document: its audience and what it hopes to accomplish. If the same subject is covered elsewhere, explain how this differs from that treatment.
- . Clarify what you want from reviewers. That is, are they to try and read all or just selected parts; are comments welcome on style, format, etc., or is the document set in concrete (heaven forbid)?
- . Tell them who to consult for purely technical questions, especially if it is someone other than the editor to whom the review drafts are to be returned.
- . Briefly outline your ideas on final format so they have a picture of the finished form.
- . State an unequivocal deadline (good luck) and be clear on where and to whom comments are to be returned. Make yourself accessible for questions or comments. Be fair about the review time allotted, but don't allow more than about a week except in unusual circumstances. The material gets stale; if they haven't found time in a week, they probably don't have time.
- . State the form in which you prefer comments (e.g., a phone call, notes on the copy, typewritten or

machine-readable additions, resolved comments rather than questions).

- . Be clear about whether this is a first draft (more reviews may be possible later) or a final draft (last chance).
- . Try to indicate the anticipated publication date.
- . Finally, use your imagination to make that review memo stand out amongst the thousands of leaves of paper that cross people's desks. Use colored or odd-sized paper; draw cartoons; handwrite it.
- . Do all this, but be brief so your reviewer doesn't tire before reaching the document.

### 4) Working with reviewers

Work with your reviewers during the review process. Be accessible and open to meeting with one or several of them for discussion or sharing of ideas. Initiate that discussion yourself by proposing that comments be looked at together before they get filed to be worked on later. Before or after the initial review process, it may be helpful to call a meeting to allow all reviewers to share their comments with each other. If possible, you as the editor should conduct the meeting so that all questions can be resolved to your satisfaction; you are the one who will have to write or rewrite the draft.

### 5) Resolving conflicting comments

The resolution of conflicting technical viewpoints (even ideologies) that arise in a review is definitely one of the most frightening parts of the editor's job. Without sounding mean, I'd like to place that responsibility where it belongs - back in the hands of the people who hold conflicting views. The editor cannot (or should not) make policy on technical decisions; forcing the decision back into the hands of the reviewers requires that they go to the appropriate technical or management level to get the resolution. Be kind - simply state the case and tell them to get back to you with the final word. Regarding conflicts on questions of style, phrasing, organization, etc., over which the editor has more direct control, find out what your reviewers are trying to tell you if they suggest changes or criticize particular sections. They often have valid points

about the effect of the style on the communication of the material. Be firm with your ideas too; your writing expertise counts. Ultimately, the editor has responsibility for the final written document.

#### 6) Incorporating the results

When faced with anywhere from one to twenty-five copies of a draft, with comments generously given throughout each, the editor needs a plan of attack. To get a feel for the flavor of the comments and to note any major areas of conflict or needed work, it's a good idea to go briefly through each copy, perhaps making notes about particular comments.

At this point you may need to meet with an individual or group of reviewers to clarify particular areas. If you notice that your reviewers have missed a point or misinterpreted your approach, that may indicate several things:

- Perhaps you needed to send a work out in earlier draft stages to generate some thought before so much investment went into it.
- Perhaps the definition of the project was unclear in either the document or the review memo.
- Perhaps the reviewer is basically contentious (but the reviewer is your customer and is "always" right).

If possible, two drafts and two review stages are ideal. Allowing for only one puts undue pressure on everyone; more than two will solicit increasingly insignificant additions. (Anyone will think of as many rewrites of a sentence as you give him or her chances to rewrite it.)

Once you have a feeling for the edited drafts, your next step should be to take a fresh copy of the work, at least double (if not triple) spaced and begin to make specific changes from the returned copies. If you've looked through them, you should be able to sort them in order of fewest to most changes. Start with the "fewest" pile and use pencil to mark your draft; you will probably be rewriting a few sections yourself as each review comment is considered. Don't splice in changes verbatim; use your editorial skill to work them in smoothly and expand on them as needed for good transitions from the old material to the new. Make notes, or

a list for your future reference, of things to be followed up - you won't be able to remember them all.

Ideally, reviewers should get feedback on their comments. If you can, make brief notes about how their comments were used, and return their copy to them. This can be especially important in cases where some comments were rejected because of higher level decisions.

It's not within the scope of this paper to go much beyond this with editorial advice; writers/editors are on their own from here. Let's devote some thought now to the role of the reviewer (who is most often not a writer).

#### LEARNING TO BE A KIND REVIEWER

The editor carries a heavy burden in the production of a good document (see above if you don't believe that). But, the editor seldom works in isolation - there is almost always a necessary partnership with technical and managerial staff and coworkers. One of the manifestations of that partnership is the review process. I'd like to explore some ideas that you, a reviewer, should consider in making that partnership amiable and productive.

- 1) Know what's expected of you
- 2) Remember the editor is a person with feelings
- 3) Communicate your ideas effectively
- 4) Learn how to mark up copy

#### 1) Know what's expected of you

First, a reviewer must know what is being solicited. If it is not clear what the intended scope and audience of the document is, find out. Don't try to muddle through and find out too late that the project was not at all what you thought. A technical review is likely to look different from a managerial or policy review. Be sure you know what hat you are wearing. Many hours of misdirected labor can be avoided if you and the editor are approaching the project from the same point of view.

#### 2) Remember the editor is a person with feelings

Perhaps it shouldn't have to be said; nevertheless, remember the editor who will read and digest your comments is a sensitive person with pride in her or

his work and with distinct feelings about what has gone into the document. Be straight-forward in your comments and note questions about particular points. State additions or corrections clearly and unambiguously. Be careful about including humor in your review remarks. The definition of funny varies with so many factors that what seemed funny in your mind may be interpreted very differently by the recipient. (Please don't inhibit yourself too stringently though; a kindly-intended, well-placed bit of humor can bring a genuine smile to an editor's dreary day.)

Don't make sarcastic side notations and don't make sweeping changes or deletions without explaining them; the author/editor has a right to know why a drastic change is necessary. If you think a particular point is a sensitive one, perhaps it is better to discuss it over the phone or in person. Never insinuate that the editor is stupid or somehow lacking because some point is inadequately covered; that, after all, is the function of the review. Editors expect you to flesh out documents, not flay them.

### 3) Communicate your ideas effectively

Try to give the editor a clear idea of what you think you can contribute. If you are a manager raising some policy questions that must be resolved, state that clearly by explaining any corrections or additions you make. It is not easy for the editor to identify or respond to those kinds of comments. Ideally you should, as a manager or technical expert, resolve any questions you raise - or at the very least defer to a specific person for the final authority. Be especially sensitive to notes the editor may have included asking for more information. Perhaps if you can't provide it, you can suggest someone who can. The main point of the review process is to clarify information that is there and add any that has been missed. Try to hold up your end of the deal by supplying as much as you can. Avoid raising issues for which you can't recommend a solution or a consultant - that is one of the most frustrating bottlenecks in the editor's job.

Don't use the document as a forum for your gripes or criticisms of technical things that are unlikely to change. Remember you are speaking to the editor, not the system designer. If you have a gripe with a technical point, discuss it with the appropriate person (the editor may be able to help you identify who that is). If you break down an editor's

faith in your ability to review effectively, communication fails and you risk being left off the next review list.

If you think of things which would be effective additions for the document, try to determine whether they are really crucial, good additions, or just nice afterthoughts and label them as such. Often when good ideas come up they will be useful additions on the "next" version of the document so it's a shame to lose them if they can't be incorporated this pass through. (Editors! are you listening? - don't forget to keep those good ideas around for the future.)

The editor does not expect you to be a skilled writer (although well-written phrases are always gratefully accepted). If you have an idea you want included or a point you want to emphasize, state it as clearly as you can and ask the editor to expand on it - don't struggle to write beautiful sentences and excellent paragraphs (unless you can and want to). You may want to note a reference for more information or make a note to discuss it further with the editor.

One good way to fail to communicate is to miss a deadline. Deadlines are not set to make your life miserable - they are necessary to get a document eventually to publication. Do as much as you can within the time frame given and return the copy when requested. If you have to choose certain parts to concentrate on and certain parts to skip, do so. If there is a reason you can't make the appointed hour, talk to the editor to see what can be worked out, and abide by any extended time limit you might get. Ignored review copies or late comments make the editor's job nearly impossible.

### 4) Learn how to mark up copy

It seems silly to say, but pick a bright pen or pencil. An editor's frustration mounts when trying to find a comment hidden by the color of the listing itself (for example, using a plain pencil on a black and white draft, or a blue pen or pencil on a blue-lined printer listing). On the other hand, don't write with great slashing strokes; use your conservative handwriting style - it puts the point across more gently.

The way copy is marked up can make a lasting impression on the editor who reads it. Editors will seldom mind your putting a simple checkmark or circle around typos or misspellings, erroneous

punctuation, unfinished sentences, or awkward phrases; but for heaven's sake don't correct the spelling or punctuation - that insults the editor's intelligence. It's better just to circle the offending area and go on about your business of review. (One exception is when a technical word - one not likely to be in a dictionary, like an acronym - is misspelled or misused. Then your corrections will be appreciated.)

#### SUMMARY

It seems that I have outlined many rules and DOs and DON'Ts for everyone involved. The intent was to provide a structure for a process that is both technically complex and emotionally charged. Many of you may have been in both positions at one time or another in which case much of the preceding may seem like common sense or helpful reminders. If you have never been in either position, I hope these notes can help you to be an effective editor or reviewer and an empathetic partner when you are on the "other side."