

# Maintaining Editorial Quality Control of Marketing Messages

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## SUMMARY

Quality control in all communications, especially communications that will reach a wide audience, is essential to the production of effective marketing messages. Understanding the editorial process, managing the editorial workflow, perfecting the final review, and proofreading are key elements of managing editorial quality control.

## WHAT DO YOUR MESSAGES SAY?

Every firm or organization communicates numerous messages every day—in documents, letters, e-mail, publications, speeches, presentations, Web pages, marketing materials, or manuscripts for professional journals or periodicals. These may appear in print, on a Web site, in PowerPoint slides, or in other media, but almost always they are largely verbal messages.

“Branding” is a popular marketing concept among professional service firms today, as it is in other sectors of the economy. Architects may find the idea of developing a brand for an architecture firm odd, but every organization has a brand, whether it is developed consciously or not. It is the image or overall impression the firm communicates to clients, potential clients, business associates, contractors, journalists, or the public. A firm’s routine documents, presentations, and publications can either support or undermine the brand.

Architects excel at visual and graphic communication and devote great care and attention to their visual presentations. After all, it would be embarrassing to present yourself poorly using the tools of your chosen profession. But architects—perhaps understandably, given their emphasis on the development of visual communication skills—rarely exercise equal care with their verbal communications.

Any message—no matter how creative or substantive—loses much of its power when riddled with misspellings, typos, errors in grammar or punctuation, or unclear or awkward writing. Such errors subliminally communicate carelessness,

ineptitude, and a lack of preparation. In contrast, documents prepared with error-free prose convey competence, reliability, attentiveness to detail, and overall excellence. What message do the written communications of *your* firm convey?

## THE VALUE OF WORDSMITHS

Much like architecture, editing is both an art and a skill acquired through many years of education and experience. The work of editors, although largely invisible, can help an organization deliver a consistent message and speak to diverse audiences with one stylistic voice. Editors help ensure conformity to in-house style conventions (concerning capitalization, abbreviations, industry-specific terminology, and so forth) while also enforcing any established branding standards, both in language and design.

Not all firms are large enough or have a sufficient volume of editorial work to justify employing editors full-time. But with a little effort, a firm can find a competent editor to work on a consulting basis, much as you would hire a consulting engineer. The Internet eliminates any barriers of geography, so that even firms in small towns or remote locations can avail themselves of the best editors at a reasonable cost.

## THE EDITORIAL PROCESS

Whether or not a firm employs staff or consulting editors, it is advisable to establish an editorial process. The quality of that process will depend on how systematic and structured it is. A firm that relies on spelling and grammar checking software does not have an “editorial process.” A spell-checker will not recognize certain embarrassing misspellings of words such as “public” or “friend,” will not detect obvious errors in phrases such as “Joint Chefs of Staff,” and can detect only the most rudimentary errors in syntax and grammar. Grammar-checkers often fail to recognize the intended meaning or composition of a sentence and may recommend erroneous “corrections.”

Professional employees in a design firm are expected to increase their level of skill and competence over time. In the same way, all employees whose jobs require writing should work to improve the quality of their professional communications and their understanding of the editorial process and its importance. Employees should at least know the difference between each level of editing and when, why, and how they might be applied to their written works.

The typical levels of editing are listed below with brief descriptions of the scope of work at each level. In a large publishing enterprise, or for lengthy works such as books, a different person might perform each set of tasks, as each requires a different mindset or set of skills. For shorter works, a professional editor might perform all of these tasks, either in distinct, sequential steps or all at once.

Editorial requirements are often adjusted when time or resources are short. At a bare minimum, it is advisable to subject all written works to careful proofreading to help minimize egregious typos, misspellings, inaccuracies, or formatting problems.

Insisting on a “second set of eyes” rule for all documents can minimize potentially embarrassing errors. Even skilled writers and editors overlook blatant errors in their own work. Because an author or substantive editor is intimately acquainted with the text and “hears” the *intended* text when reading it, his or her brain tends to correct (and overlook) errors “on the fly” that are obvious to a disinterested reader.

The levels, from the least to the most extensive editing, are these:

- **Proofreading** involves correcting typos, spelling errors, basic factual inaccuracies, unattractive or inconsistent formatting, and blatant punctuation or grammatical errors. The proofreader also may compare one version of the document to another to ensure that all changes are made correctly and no new errors have been introduced.
- **Copyediting**, in addition to the tasks above, entails fixing problems with overall sentence structure, including grammar, punctuation, and usage; correcting nonparallel construction in lists; ensuring that graphics are properly placed with appropriate text references, captions, and credits; ensuring consistent style (e.g., for numbers, capitalization, and hyphenation); rewriting confusing or awkward text; and generally improving readability by eliminating

wordiness, excessive use of the passive voice, and poor word choices.

- **Substantive editing** (also called structural or in-depth editing), in addition to the tasks included above, involves assessing overall content and whether a document effectively conveys the desired message. The editor improves the content and structure as needed—perhaps writing introductions, transitions, or summaries and either rewriting sections of the text or asking the author to resolve questions or fill gaps in the information. The editor also reviews the graphics and how well they work with the text.

In a full production process, the text typically proceeds from author to substantive editor to copy editor to designer (print or Web) to proofreader. Of course, not all written works require all of these steps, and sometimes a single person performs most of these tasks. For some materials, various forms of executive and legal review may also be part of the process.

## STREAMLINING AND MANAGING WORKFLOW

As documents are being edited, whether by in-house staff or by a contractor, version control is critical and must be enforced systematically. Now that text is produced and often edited electronically, authors or other parties must avoid confusing older, unedited versions with the edited files.

One way to help ensure version control is to clearly date or otherwise add codes to the document file name at different stages in the process. In addition, parties who wish to make late corrections may mark them on hard copies and submit them to the editor or proofreader who is working on the document.

For that matter, carefully proofreading hard copy is the best way to eliminate any remaining errors because it is the surest way of seeing those errors. For some reason, errors are more apparent on hard copy than on a computer screen. Editors often catch errors on hard copy that they missed while editing an electronic file.

Remember, too, that errors not corrected early in the process can be costly. For written works that are intended for a large print run, such as books, brochures, or newsletters, the staff may have one final opportunity to review the printer’s page proofs, but publishers and printers charge a premium for changes or corrections that are author alterations (AAs) as opposed to printer errors (PEs). Even that cost, however, is small compared to the cost of a

substantive error in a marketing brochure—such as an incorrect toll-free telephone number for ordering products or services—that is mailed to thousands of customers who then cannot reach you.

**MAKE FINAL QUALITY CONTROL REVIEW MANDATORY**

Even on publications that employ a cadre of professional editors, errors can persist through several rounds of editing, correction, and proofreading. An editor may have scrutinized the text but might not have seen the finished document after others have made last-minute corrections. When deadlines are looming, the text might be divided among several proofreaders, and no one person sees the entire document in final form.

When everything seems perfect a final review by a fresh pair of eyes can make a big difference. If possible, designate a quality control reviewer to look at the final document as a *whole*—much as the intended reader would. This reviewer should be someone who has never seen the document before (the ideal reviewer is detail-oriented, possesses strong editorial skills, and is familiar with the organization’s style conventions). As noted above, someone who is intimately familiar with the document is the least likely to detect the most blatant errors in late stages of the production process.

A quality control reviewer looks at the overall visual appearance of the pages, slides, or screens and (depending on available time and desired level of quality) reviews each page of the complete document using a prepared checklist of prioritized elements, which might include the following:

- Complete and correct placement of graphics, figures, and captions
- Consistent formatting (fonts, margins, etc.)
- Accurate pagination (proper sequence, no missing pages, etc.)
- Correct titles, subtitles, and headings
- Coordination of the table of contents with the text
- Complete text (all placeholders for missing text have been filled in or deleted)

A quality control review requires planning to ensure enough time (before deadline or shipment) to fix errors (especially major ones) that the reviewer might find.

A structured editing and quality control process for documents adds time, effort, and expense to a firm’s operations, but it also adds value: All documents and publications will reflect excellence. That’s the right message.

**LESSONS LEARNED**

The key take away points from this Best Practices are proofread, proofread, and proofread again. Whether you use outside consultants or in house staff it is always important to have multiple people review any marketing material that is set to be distributed to many people.

**RESOURCES**

**More Best Practices**

The following AIA Best Practices provide additional information related to this topic:

- 07.01.07 Taming the Bull of Business Communication
- 07.01.08 Developing a Book Proposal
- 07.01.12 Publications: Product Type Definitions

**For More Information on This Topic**

Standard references for writers and editors can provide a sound foundation for a consistent editorial process.



Venolia, Jan. *Write Right! A Desktop Digest of Punctuation, Grammar, and Style*. 4<sup>th</sup> ed. Berkeley: Ten Speed Press, 2001.

The Associated Press. *The Associated Press Stylebook and Briefing on Media Law*. Rev. ed. Edited by Norm Goldstein. Cambridge, Mass.: Perseus Publishing, 2004.



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