Improving your editing efficiency: software skills, *soft* skills, and *survival* skills

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Editing efficiently involves a mix of software *skills,* soft *(human) skills, and strategies for surviving chaos. Although software skills are certainly important—we never have as much time as we need, and computers really can help—we must still nurture author–editor relationships. Knowing the strategies battle-scarred editors have developed over the years can save you from duplicating those scars. In this paper, I'll discuss the software skills you'll need to work efficiently, how to cope with the human factors involved in editing, and some strategies for managing the often-chaotic editorial life.*

IT'S ALL ABOUT EFFICIENCY

As the world grows faster and we grow busier, we're often left with insufficient time to accomplish everything we must accomplish. This is particularly true for editors and peer reviewers in the workplace, since we're routinely the last ones brought into the writing process and are typically forgotten until deadlines loom. Surviving and perhaps even thriving under these circumstances requires coping skills to get you through the crunch. These skills fall into three main categories:

- software factors: the tools of the trade
- human factors: the "soft" skills to deal successfully with authors
- strategies: survival skills for managing chaos

In this paper, I'll discuss the time- and sanity-saving skills I've learned in nearly 20 years of embracing the fascinating chaos that is editing.

A note for freelancers: It may seem, at first glance, that reducing the time it takes to complete a job is undesirable, since it would seem to reduce your billable hours. That's missing the point. Working more efficiently frees up time that you can spend to take your time and do a better job on each manuscript. If you're able to bill by the page or by the job, you'll also end up earning more per hour. Alternatively, you can use the time you save on a manuscript to do more work for other clients—or to spend more quality time with your friends and family.

SOFTWARE FACTORS

Any professional must master the tools of their trade, yet it's clear from more than 10 years of discussions in the copyediting-l discussion group (www.copyediting-l.info) that many editors never advance beyond the most basic skills necessary to get them through the work. Here are some suggestions on how to gradually master your tools rather than letting them master you.

Monitor how you work

Start by asking yourself what tasks you're doing inefficiently. These include the time-consuming tasks you must perform infrequently and the quick tasks you must do far more frequently than you'd like. In both cases, the goal of mastering your tools is to let your software do the work. The key is to pay enough attention to how you're working that you're able to detect the things that are eating up the hours or that drive you nuts those few times you need to accomplish them.

For example, many of us find we must routinely ask the same question, with minor variations, dozens of times per manuscript. Rather than typing a short, telegraphic, somewhat harsh note about each occurrence of a problem, why not type a gentler, more complete explanation of the problem and the potential solution? To do so, learn how you can type the full phrase only once, then let the software do the hard work for you thereafter. Most software offers an "autocorrect" or "glossary" function that stores such phrases and automatically replaces them when you type a shortcut phrase. In my work (editing manuscripts submitted to research journals), I find many missing literature citations. To explain the problem, I insert a comment, then type a four-character shortcut (>rm for "reference missing", followed by a space), and Word automatically expands this into a 92-character explanation of the problem and two proposed solutions. This saves me 88 characters each time I need to insert this comment; at a dozen times per manuscript, that's a savings of 1056 characters I don't have to type. I've created nearly a dozen of these shortcuts, some considerably longer or more frequently used. If your software lacks this feature, save these standard queries in a file so you can copy and paste them manually.

For more complex issues, learn how to record macros. For example, I created a macro for the routine cleanup I perform to remove double spaces, double paragraph returns, and a few other simple spacing problems. Each individual search and replace operation is relatively

quick, but taken as a whole and multiplied by the number of manuscripts I handle in a week, I was losing considerable time. My cleanup macro now does the job in a single step. (You can also use macros to type text for you automatically if your software lacks an autocorrect feature.)

Learn a new trick every week

If you accept my advice in the previous section, you can quickly create a list of the editing tasks that annoy you or that you're doing inefficiently. Rather than simply accepting this situation, invest some time in solving the problems. Here's how:

Every week, browse the menus of your software to see whether you've missed any previously unknown features that the software offers. (You'd be surprised at how many of these there are!) Pick one of these functions and ask how it might ease your work or your frustration by solving a specific problem: browse the online help, or your favorite third-party manual for the software.

"Tricks" can be as simple as learning a keyboard shortcut that keeps your hands on the keyboard rather than wasting 5 seconds each time you reach for the mouse—1 second to take your hand off the keyboard, up to 3 seconds to find and select the right menu choice, and another 1 second to return to the keyboard. Do this 100 times per day, and you've lost more than 8 minutes—enough for a decent coffee break. Tricks can also be quite complex, such as the "wildcard" and "regular expression" subtleties of the search function—two powerful tricks few editors learn, even though they can save hours of editing time.

Once you discover something useful, practice that trick until you've mastered it. After a year, you'll have learned 52 new tricks to make your life easier. If each saves you only 5 minutes per year, that's still 4 hours saved (half a day's work). Many tricks will save you far more time.

Create templates

If your writer colleagues or clients create a series of standardized reports or manuals, create a template document that does much of the work for them. My article on dynamic style guides (Hart 2000) provides details, but here are a few simple examples of things you can add to a template:
- Type all the required headings in the template, formatted using the correct paragraph styles, so authors won't have to type them or apply styles. This saves both time and typos, and thereby reduces editing time.
- For simple sections, add a one-sentence description of the contents to ensure that authors know what to write, and apply the correct style to that explanation so authors can simply type over that text rather than

having to apply the style in a separate step. For example: "Describe the two most important problems you set out to solve in no more than 200 words."
- For more complex sections, add subheadings and bulleted lists, all properly formatted. This helps ensure that the required content will be present, in the correct order, sparing you the task of having to ask authors to provide missing content or reorder the information. For example: "Describe the five following items, in the following order: [followed by a list]"

Creating an effective template takes time, but it's time you only need to invest once. Thereafter, each use of the template saves you time on each editing job. Better still, because it helps the authors do their job, it's an easy solution to accept, and is thus more likely to be accepted. Speaking of which:

Make it easy to adopt your suggestions

If, like me, you do mostly substantive editing, you're doing or proposing heavy rewriting of some parts of the text. In doing so, your goal should be to provide or propose solutions the author can adopt rather than merely reporting problems.

For short corrections, such as typos involving one or two letters in the middle of a word, it's often faster to retype the entire word (thus, provide a complete solution) than it is to painstakingly navigate your cursor into the center of the word and make the corrections. For longer or more complicated corrections, it's often faster to copy the problem text into a comment and shuffle the words until they make sense to you than it is to retype individual words from scratch. In both cases, your corrections are easier to read because the author sees the *results*, not the (often) many steps required to reach that result.

If you teach your authors to copy solutions from the comment window into the main document, they'll produce fewer incorrect solutions and typos because they are adopting your clear and correctly edited solution. This reduces the burden of editing when you see the manuscript again because there's less unedited new material for you to review.

Master search and replace

Search and replace is a fast way to replace a recurring error everywhere—if the correction is simple. But what happens when you only want to replace half the instances of a word, and it's not clear how to set up a search pattern that will find only the problem instances?

Search functions highlight the target word or phrase as you move through the document, and therein lies a

shortcut: When you find the first word that must be replaced, close the search dialog box, then type the replacement text. Doing so instantly replaces the incorrect text. Next, copy the replacement text so you won't have to type it again, and use the appropriate keyboard shortcut to find the next occurrence of the problem. This is often Control (Command on the Mac) plus G (for "find 'gain'"), but Word also provides the Control (Command) plus PageDown shortcut. Use this keyboard shortcut to move through the file, one instance of the search text at a time. If you've found a problem, use Control (Command) plus V to paste the copied text to replace the highlighted text; if not, use the "find next" shortcut to move on to the next potential problem.

For longer documents, it's helpful to build style sheets to keep track of your editorial decisions. A typical style sheet entry might be as follows: "select: preferred choice; don't use click, click on, enable, highlight". You can now search for each of the forbidden variants and immediately replace them with the correct term. This is a remarkably powerful tool for imposing consistency on a long document.

Use your spellchecker effectively

Everyone uses a spellchecker, but few people use it effectively. Consider, for example, the power of using custom dictionaries, an exclusion dictionary, and language definitions.

Most software lets you add words to the existing spellchecker dictionary (usually creating a "custom" dictionary in so doing). Word goes one step better by providing a custom dictionary for the spelling dictionary for *each language* installed on your computer (e.g., for U.S. versus U.K. English, Canadian versus Parisian French). If you add jargon to your custom dictionary as you spellcheck, over time you'll gradually include all the key jargon from your field that isn't already in the standard dictionary. Thereafter, the spellchecker won't ask you to approve these words and will offer the correct spelling as a replacement option should the jargon be mistyped. Word also lets you create a separate custom dictionary for each project, which is useful because custom dictionary files have a maximum size, and there's no point adding rare words to these dictionaries and using up space better devoted to more commonly used words.

Some software (including Word) also offers you the ability to create an "exception dictionary". The purpose of this dictionary is to flag correctly spelled words during a spellcheck when there's a risk that these words are actually mistyped versions of another word. For example, journalists writing about "public health" dread seeing the headline "pubic health" in inch-high type on the front page of a newspaper. You can also use this dictionary to help you spot commonly confused words that you have problems with, such as *which* versus *that*

and *affect* versus *effect*. An exception dictionary provides a second chance (during the spellcheck) to decide whether the word choice is correct.

Most software lets you apply language settings to character or paragraph styles, then apply these styles to words, phrases, or entire paragraphs. Once you've done so, the spellchecker will use the correct language dictionary for this text during spellchecks. This can save enormous amounts of time because you won't have to manually tell the spellchecker to ignore each of the foreign words that are not found in your English dictionary; better still, the software will use the dictionary you specified to check the foreign word's spelling. With a little care, you can apply the language settings globally using the advanced features of the search and replace function; for paragraphs or sentences, you can also apply the styles manually.

Efficiency also involves doing something time-consuming once rather than multiple times. For example, I used to spellcheck a document before I began editing so that typos wouldn't distract me while I worked. But since I had to spellcheck the document after editing anyway to catch any typos I introduced during my editing, that meant I had to do the check twice. In the end, it proved much faster to do the job only once, when all other editing was complete.

HUMAN FACTORS

Authors can have fragile egos, and even when they don't, many see editing as an inherently adversarial process; after all, any extensive amount of editing sends a clear message that you aren't impressed with the author's writing skills, and that you're the better writer. This situation creates barriers between authors and editors that can make it difficult to work together effectively. Lowering these barriers can save you considerable time and make your job that much more pleasant by building trust and encouraging a friendly collaboration. To create such effective author–editor relationships, you must develop a soft touch. Here are several important things to keep in mind:

Agree on what's required

Authors are naturally irritated when we edit more heavily than they requested. To avoid this problem, identify what is and isn't required of you before you begin editing. This understanding constitutes "the author–editor contract", and although this contract can become informal and unspoken once you've worked together for long enough to trust each other, it must initially be a clear and explicit statement. This is particularly true if you're a freelancer, since this understanding becomes your *legal* contract (and determines when, how, and whether you'll be paid).

Learning the author's goals before you start lets you focus on the things that are most important to the author, and saves you time by specifying what you shouldn't do, and which changes require no explanation or approval. Unrequested edits and unnecessary explanations cost you time you may not have, and cost authors time (by forcing them to review the comments), but omitting a necessary explanation may cost you the author's good will. Agreeing about your role and your responsibilities right from the start minimizes this problem.

Empathize with the author

Many authors find that being edited is a difficult and possibly even painful process. Remember that, and think about how you can make the process less painful. If you can begin your relationship by presenting clear evidence that you plan to focus on *their* needs, you'll begin to establish a mutually respectful and possibly even friendly working relationship right from the start. If your authors are workplace colleagues, it's doubly important to establish an ongoing, supportive relationship that you can strengthen over time. Start by preparing an author for what to expect. For example, remind the author that your job is to focus on problems, not positive things, and thus, that your edits will inevitably provide a negative impression of the quality of the writing.

Even if you work almost exclusively by e-mail, never meeting an author, it's still possible to exhibit sympathy for the author by asking how you can make the editing process more palatable to them. Offer them a chance to propose ways to make the process easier. For example, some of my authors hate to review my edits onscreen, so I taught them how to print a copy with revisions showing so they could review the edits on paper. If an author has no suggestions, propose something helpful. For example, I developed a short primer on Word's revision tracking system that I provide to authors who need a refresher course on how to review my edits as quickly and painlessly as possible.

Make things easier for the author

As a general rule, strive to make it easy for authors to adopt your suggestions. Authors are most willing to accept solutions that cause them little difficulty, and appreciate solutions that save them time and effort. The goal is to strengthen their perception that you're a helper, not just another obstacle on the road to publication.

If you work frequently with certain authors, make time to learn what problems they have with the writing process and offer solutions. For example, when I was a full-time employee, several of my authors had enormous difficulty starting to write and just as much difficulty creating a coherent and effective manuscript once they did start. As a result, I ended up with incoherent,

rambling manuscripts to edit that contained significant omissions. Once I understood this, I began sitting down with them to create detailed, effective outlines before they began writing. I used the "five w's" approach (who, what, when, where, and why?) to develop a list of everything they needed to present, then put that information into an effective order. In addition, I refused to accept the vague generalities often found in outlines. Instead, I insisted on exact answers to each question. For instance, I insisted that they answer a question similarly to "method A was 25% more productive than method B" rather than using a weasel phrase such as "I'll compare the productivities of two methods".

By listing carefully thought-out points in an effective order, we avoided including useless information that didn't answer any reader's questions and produced a decent first draft of the manuscript that required minimal additional work. This *developmental editing* cost me an hour or so each time, but the result was far fewer substantive issues for me to correct, leaving me free to focus on clarity. Better still, I greatly decreased their writing-related stress, helped them turn out reports faster, and gave them a reason to work with me early and often—because I was a solution provider rather than a problem. As a bonus, the hour I invested in this collaboration generally saved me more time than it cost me.

Edit persuasively and tactfully

Because we rarely have authority over our authors, we must instead *persuade* them to accept our edits. Tact and diplomacy help overcome the natural resistance to being edited. Many of the same verbal tricks you'd use in conversation work equally well in editing, since editing is also a dialogue. Favor wording that *requests* ("you should...", "please...", "I think that...") rather than *demands* using the imperative voice and overly strong words such as "you must". Always explain the problem from your standpoint ("do you mean..."), focusing on the problem that the text poses for you rather than seeming to attack the author. For example, asking "Do you mean X or Y...?" is a far gentler way of saying "you haven't explained this clearly", and turns a criticism into a request that invites dialogue.

Adopt the role of someone who *suggests* reasonable changes and *justifies* those changes. Many authors feel that editing is arbitrary and subjective, but if you can clearly explain a proposed change, they're more likely to accept it. Where possible, offer solutions rather than simply reporting a problem; this means that the author won't have to develop a solution on their own, and by easing that part of the author's task, you provide an incentive to work with rather than against you.

When you're done and are ready to return a manuscript to the author, always conclude on a positive note. If you can honestly compliment the author, do so—but don't be

dishonest by providing patently false or meaningless compliments. Always emphasize your willingness to work with the author to come up with mutually satisfactory alternatives for each case where the two of you disagree on a point. This reinforces the fact that you accept your own fallibility, and that you want the editing process to be a process of achieving consensus, not a one-way dictation from editor to author.

SURVIVAL STRATEGIES

Understanding the overall publishing process and where you fit in can also save you considerable time, not to mention your sanity. Learning the weekly, monthly, and annual rhythms of your colleagues' work or of a client organization gives you a chance to schedule yourself appropriately. Typical things you should strive to learn include:

- the start and end dates of key budgetary periods (such as the fiscal year), which are often times when all publishing money must be spent lest it disappear from a manager's budget
- external factors that influence deadlines, such as the end of the fiscal year *for a client's collaborator* (e.g., the time when government research grant applications are due) or the proposed shipping deadline for a new product
- other key periods, such as vacation times, annual meetings, and major trade shows or conferences

Knowing about these deadlines has often let me plan around them. For example, knowing that the end of the fiscal year was coming, I've often sought out authors and helped them move their manuscripts along during "the calm before the storm", thereby freeing up more time for me to handle the coming storm of other manuscripts that would, as happened every year, arrive at the last possible moment.

Learn your own rhythms

Pay attention to how you work, and you'll discover that you're more alert at some times of the day. For example, I find that I'm most alert in the morning about an hour after the coffee kicks in, and least alert right after lunch. Knowing this, I can perform high-level, intellectually demanding editing tasks such as substantive rewrites and editing mathematics during the morning. In contrast, I reserve relatively mindless tasks such as checking literature citations and formatting bibliographies for after lunch. You may think better in the afternoon than in the morning; different strokes for different folks!

Knowing how to divide up your work lets you work faster and more accurately on the difficult tasks while you have the mental energy to do so, but also lets you keep putting the pages behind you during any slumps.

Learn triage

There's rarely enough time for perfection, so we're often forced to determine what we can realistically accomplish in the available time and set priorities on that basis. (*Triage* is the French word for "sorting", and in this context, the sorting is done by priority.) Triage means that you should divide your priorities into three categories:

- First, fix anything that prevents readers from understanding the text, any errors of fact or logic that create incorrect understandings, and anything that endangers readers or their property (including computer data). Even if you don't have time to do anything else, you at least ensure that readers get the message (even if it might take some time), get the right message, and do so without risk of loss or injury.
- Next, work on any problems that merely make comprehension difficult. Ideally, a reader should never have to waste time trying to figure out what the text means, so your goal in this step is to eliminate any "speed bumps" that lie between the reader and understanding.
- Last but not least, polish the prose if you have time. Eliminating every typo won't help if the text itself is incorrect and incoherent, but it's still a worthy task if time permits and if doing so won't prevent you from dealing with more serious problems. Ignore things that only an editor would notice; a mocking e-mail from an editor buddy about a missing serial comma on page 703 is annoying, but the omission is irrelevant if no reader spots it.

Accept "good enough" edits when you know that you'll see a manuscript again before it's published. For example, when I used to edit manuscripts before technical review, my goal was to help reviewers focus on the content, not the language. I knew that the authors would revise the content, often heavily, in response to the reviews, and that I would have a chance to edit their revisions. As a result, I knew that I could afford to let minor things slide because I'd have a chance to correct them later. (Similarly, if another reviewer will polish a manuscript after your final edit, they'll have a chance to catch anything you missed.)

Of course, if you're the last person to see a manuscript, and you'll only get one chance, you must strive for perfection. Fortunately, if you've learned some of the tricks I've presented in this paper, you'll have freed up enough time that you'll have the chance to aim for perfection.

Go around *obstacles*

One common mistake we all make involves wasting time trying to understand a difficult problem so we can fix it. That sounds reasonable, but getting bogged down in an author's muddy thoughts can lead to significant delays. Instead, when you can't handle a problem quickly, highlight the problem and move on rather than spinning your mental wheels. Come back later for a second look, but in the meantime, keep putting those pages behind you. Often, you'll find that the additional context you encounter later in the manuscript provides the understanding you need to solve the problem. Moreover, letting your subconscious work on the problem often gets you to a solution faster than would otherwise be the case.

One common example occurs when you encounter a confusingly written executive summary or a poorly chosen title at the start of a manuscript. Although it's tempting to bull your way through, you'll find that you edit this material faster and more accurately if you return to it only after you've completed the rest of the manuscript. By then, you should have a good understanding of what that the author is trying to summarize and enough understanding of the overall manuscript to come up with a better title.

Practice specific solutions

If you find yourself unable to solve particular types of problem, such as subject–verb agreements or gender-neutral writing, budget time to learn *at least one* solution. An hour spent understanding a problem and its solution is an effective investment if it saves you many hours in the future. Learning *multiple* solutions lets you discover which one works best for you so you can practice until you've mastered it, but also provides alternatives for the occasional situation when that main solution won't work. Problems that you've mastered stop costing you time, and free up time that you can use to work on other problems.

Focus on problems that cost you the most time, and learn a new category of problem-solving every week or month or season—whichever schedule works best for you. For example, each time you open a style guide to research a point, add a Post-it note to the page you've just consulted and add a tick mark to the note each time you open the guide to that page. After a week or month or season, identify the subjects you researched most often, then memorize the solutions presented on that page so you'll never have to consult that page again.

CONCLUSIONS

The intellectual tools presented in this paper probably seem obvious in hindsight, yet I spend many hours each month teaching them to other editors. This suggests that perhaps they're not so obvious after all. Spend some time considering each of the tips I've presented, and learn how each can save you time and improve your editing accuracy.

But don't stop there! Spend some time seeking *your own* innovative solutions, with your imagination stimulated by the inspiration I've tried to provide in this paper. Then share those solutions with others. That sharing often turns up many solutions you'd never have discovered on your own.

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