UNIT 7: WRITING AND REWRITING DRAFTS

OVERVIEW

In this unit, you will learn how to write and revise drafts by using strategies for writing a good first draft and for revising to improve quality and substance. One goal of this unit is to help you distinguish between draft quality and final quality writing. Understanding the differences inherent in these two kinds of writing may help you overcome the block that paralyzes some writers.

We will also discuss the process of revising drafts, including how to avoid the pitfalls some managers fall into when reviewing their employees' writing. Finally, we will discuss how to establish a formal review procedure adequate for your organization's written projects.

OBJECTIVES

After completing this unit, you should be able to:

- list three strategies for overcoming writer's block that are associated with draft writing

- differentiate characteristics of drafts from those of finished documents

- recognize potential areas for improvement in revising sample drafts

- describe the benefits of reviewing drafts through a review team

DISCUSSION

Although the flow of information within many organizations is rapid, occasionally you will find it necessary to spend considerable time developing documents or presentations. Developing writing in stages usually improves quality because it allows time to recognize and correct errors, improve sentences and paragraphs, integrate information from others, receive opinions from reviewers, and check the accuracy of information supplied in the writing. Although draft writing is a well-known technique among professional writers, it is less well

known and used among ordinary employees and managers in the workplace. In unit 4 we saw that information planning encourages draft writing by making drafts vital components of the plan.

UNDERSTANDING DRAFTS

The word *draft* refers to writing that is unfinished—a work in progress. As early as the sixteenth century, English writers were using the word in its original form, *draught*, to refer to "a preliminary sketch or rough form of a writing or document from which the final or fair copy is made" (*Oxford English Dictionary*, 796). In earlier eras, the unfinished nature of a draft could usually be accounted for by the amount of time that it took transcribers, or scribes, to copy manuscripts by hand. In modern times, where technology has made handwritten copies all but obsolete, draft writing usually refers to work that is unfinished because the writer has not finished adding thoughts to it, or because others are reviewing and commenting on it.

If we view writing as a process, as we have suggested in other units, then we must recognize the importance of draft writing within the process. Draft writing brings to fruition all of the work associated with planning and design because it allows writers the freedom to explore and develop ideas conceived during these stages. Draft writing recognizes the iterative nature of information gathering, and it emphasizes the importance of quality. For managers, draft writing can provide a system of checks, balances, and controls, which allows oversight of written information as it is developed and disseminated inside and outside of an organization.

Incorporating Drafts into the Writing Cycle

Unfortunately, writing drafts takes time and requires planning. Managers and employees alike often fail to write drafts because they believe they don't have the time, or because other organizational responsibilities don't leave them the time needed to develop drafts. Often, however, organizational changes in areas unrelated to writing need to be made to improve the writing process and allow time for draft writing.

Let's look at a situation where organizational change is needed to accommodate more time for writing. John Collins, an XYZ account administrator, has noticed that his weekly status report is almost always returned by his manager with a comment that he should improve its quality. John usually writes the report quickly on Friday afternoons before he leaves for the weekend, and then checks his figures early Monday to make sure that they match the sales figures turned out by the computer over the weekend. The computer, fed figures by sales representatives throughout the week, processes the figures over the weekend. John works from the entries that are in the system on Friday afternoon, and checks Monday morning to make sure that there are no discrepancies.

John's manager expects to see John's report by 10 o'clock every Monday morning because she uses information contained in it at the Directors' meeting held on Monday afternoons. Because of this process, John is always locked into writing his report on Fridays and checking it quickly on Monday mornings. Sometimes, John makes mistakes in checking his data, and, occasionally, when a sales rep is late entering data, the data is incomplete. John's manager is sympathetic, but she views it as John's job to ensure that the report is entirely accurate. John feels powerless to change the process because it involves employees in departments other than his own.

Situations such as this are more common than you might think, especially in large organizations. In this example, the conditions for writing are less than ideal because of time and information-gathering constraints. Although John might believe that he writes two drafts of his report, in his second draft, he does little more than correct mistakes. His process does not allow time for anything else, and error correction is the primary reason for his Monday morning rewrite.

Sometimes, such problems can be solved through a variety of solutions, some of them relatively simple. John and his manager together might implement more time for draft writing of this particular report by weighing and adopting solutions such as the following:

- Explore the possibility of moving the Directors' meeting to Tuesday to allow John to rewrite the report on Monday afternoon.

- Require sales representatives to enter all input data by close of business Thursday, so that John's first draft of the report can occur earlier and allow time for rewriting.

- Grant John access to the organizational database through use of his home computer, and arrange for him to work at home over each weekend to check and rewrite his report.

- Allow John to issue a final draft of the report after the Directors' meeting. Have him continue to verify that the statistical data in the first draft is correct, but allow more time for the final draft so that John can concentrate on improving the whole report, and not just on correcting the data.

Obviously, there may be other solutions to providing draft-writing opportunities, and some of those mentioned above may be out of the question. That is why John and his manager together need to work through John's problem to come up with the best solution. Most likely, implementing a solution would result in better quality writing from John and greater satisfaction for his manager.

Viewing Draft Writing as Fulfillment

When you view the writing process from start to finish, draft writing emerges as a natural next step after planning and design. Writers who engage in the prewriting activities of freewriting, brainstorming, or outlining find that draft writing allows them to complete ideas and to reconsider their first impressions. Draft writing can alleviate writer's block by offering writers assurance of a second chance. When formal or informal reviews are built into the draft writing process, writers can be further assured that their work will have been reviewed by others within their organization. The sense of shared responsibility for writing can increase a writer's confidence, encourage creativity, and force writers to think more broadly to appeal to a wider audience of reviewers. Draft writing, in fact, can become a reliable means for getting from prewriting activities to the final writing product in a manner that is fulfilling, rather than threatening, for a writer.

Moving from Conception to Fulfillment

Freewriting and brainstorming, described in unit 2, achieve fulfillment in the draft-writing phase of the writing process. In draft writing, initial ideas can be investigated, verified, and assessed. During draft writing, writers often adjust their initial outlines, lists, or webs and chains of ideas because draft writing forces writers to organize material based on the logic of the document rather than on preconceived designs. Draft writing provides the opportunity both for cutting and expanding information, and for changing emphasis or priority.

Once ideas are written down using such techniques, chaining or webbing the ideas by drawing lines to depict "connections" can initiate the process of organizing information—which might be continued in sentence or subject outlines such those described in unit 5. Using outlines to check progress between drafts is another way to improve organization and quality. Some company policies require an "approval" draft for all significant reports and correspondence, which managers and executives use to control the quality and nature of the information disseminated under their auspices. Often, legal departments review information to check for any potential problems that might arise due to incorrect trademark or copyright designations.

Recognizing Improvement

For draft writing to be successful, writers must be able to recognize and implement improvement in their writing. Document reviewers must also be able to recognize what should and can be improved as well as what does not warrant improvement. Relationships between employees writing drafts and managers approving them can often be complex. Revising drafts involves making decisions and working closely with details. Some managers complicate the draft-writing process for employees by expecting too much, by exposing drafts to others prematurely, and by correcting mechanical errors while ignoring more important organizational issues. As a manager, when you review a first draft from an employee writer, you should keep in mind the nature of the first draft, and work with the employee to improve it.

Because a first draft is a collection of thoughts, it is probably best to focus your comments on the thinking and organization in the writing. Look for patterns in the writing such as important ideas which may be stated more than once in the draft. These are ideas that writers deem significant, although they may not be able to expand the ideas at the first-draft stage. As a manager, you are often in a position to help writers achieve perspective and emphasize concepts that are important to your organization as a whole. In addition, you may be able to recommend sources of information outside of the writers' department or group. Because many groups within an organization develop boilerplates or templates for reuse within

publications, any outside connections you provide to these groups may save time and money. Finally, you may be able to suggest to writers other potential reviewers for their writing, and, if no formal review process is in place, you may help writers establish one.

Genuine improvement between drafts is based on more than cursory error correction, although good writers will usually improve their writing at the sentence and paragraph level between drafts. As good writers polish their prose, they tighten as they rewrite. The soundness of a document can be measured in the extent to which it covers the topic proposed and by the number of appropriate details it contains. As writers produce more drafts, their purpose should become increasingly clearer, and their writing more interesting.

For draft writing to be an effective means for improving writing, both managers and employees need to define what constitutes good writing at each draft level, that is, they must establish levels of expectation for each draft. In addition, to improve writing, managers and employees must be able to recognize improvement and progress in writing, and understand that the entire draft-writing process hinges on those goals. Making the time for draft writing available for writers is only the first step.

Establishing Levels of Expectation for Drafts

In general, improved communication about what we expect from others would greatly enhance most aspects of business life. Communicating expectations is an essential part of any manager's job, but when it comes to writing, managers often fail to provide detailed instructions for employee writers. Most often, managers focus on the final writing product—particularly its deadline—in giving instructions to writers. They may say, for example, "Your job is to complete this report and have a first cut of it on my desk first thing Monday."

Employees left to interpret such vague instructions may panic or do nothing at all. Those who panic, may assume that the report must be as close to final as possible by Monday morning. They may work through the weekend—often at company expense—to perfect the "first cut." Instead of establishing levels of expectation and using resources wisely to achieve the agreed-to expectations, panicked employees may go "all out." (One junior marketer flew to three cities in one weekend to collect, firsthand, the information for such a report.)

FORMAL WRITING GUIDELINES

The legal profession offers the contract as a means of managing expectations between and among people. Contractual relationships for writers can work, too, provided that they are clearly documented. Whether they realize it or not, most business writers work under some sort of contractual relationship at some stage of the writing process. Often in business environments, the contract inheres in the writer's job description or performance plan, a tacit agreement between employer and employee that certain duties will be performed in carrying out a job description. Managers who expand and fine-tune this implicit contract for writing situations can improve employee writing. One way to do this is to establish and publish **writing guidelines** for each draft level so that employee writers know what is expected for each draft.

The sections below provide some sample guidelines devised by information managers for technical writing projects. They exhibit what the managers expect writers to include in documents at each draft level, and they imply other checks and balances, such as reviews, that have been put in place to ensure quality.

What to Include in a First Draft

What writers include in a first draft depends on the nature of what is being written and the audience for it. To some extent, the ways in which writers gather information and present it at this stage also depend on what will happen to the information at that particular stage, whether it will be reviewed or used in a fashion that might dictate its form or content. Engineers composing a draft design document to be used in prototype building, for example, may want to include illustrations of materials and parts, along with explicit instructions for assembling them. They may allow other sections of the design document to go unfinished so that they can concentrate on getting this information in place.

The following guidelines are samples provided by an information manager at a computer firm for employees writing computer manuals. Notice in this example that some of the guidelines appear to have been included to help the document's writers prepare it for formal review.

Content Expectations: First Draft

The first draft should include the following:

- 60 percent completion of text topics included in initial outline

- for each topic, placeholders or full art for all artwork, including

    - placeholders for all photographic art

- screen shots for any working function

- placeholders for all anticipated appendices and attachments

- where known, placeholders providing the names of information providers from whom information is anticipated

- where known, complete citations for all references in the text

- precise, direct questions to reviewers and inspectors

Formatting and Presentation Expectations: First Draft

The first draft should adhere to the following formatting and presentation guidelines:

- clearly defined, selectable style (choose the style advocated for the type of book you are writing under your organization's writing guidelines)

- complete, readable sentences, as grammatically correct as you can make them

- square bracketed notes to reviewers

- draft level and date clearly visible on every page

- revision codes to indicate additional areas not included in initial outline

What to Include in Subsequent Drafts

Subsequent drafts can differ dramatically from the first if expectations for the first draft are not clear in the minds of everyone associated with the writing process. Drafts can also vary greatly if the information itself has changed, or if the writer has received many comments in reviews of the document. Numerous organizations are now trying to track the number of changes between drafts of writing—particularly in technical fields—where changes to technical documentation can point to design flaws, inefficiency, or poor processes for product development. Many large corporations ask writers to monitor changes to documents as they are developed and to assess the reasons for change. Clear guidelines for information contained in drafts subsequent to the first—along with adequate production processes and procedures— will help to ensure that draft writing progresses and documents are available on time.

The following sample guidelines for a second and a final draft within a three-draft cycle indicate the extent to which the document will be complete at each level.

Checklist for Inclusion: Second Draft

- 100 percent of topics in outline completed

- 100 percent of artwork (including photographic stills) included

- 100 percent of comments from review of previous draft included and verified

- legal, copyright, and security information provided (boilerplate), and legal department sign-off initiated

- 100 percent of editorial comments addressed and changes included, where agreed

Checklist for Inclusion: Final Approval Draft

- 100 percent of comments on second draft addressed and changes incorporated

- color markup and directions to printer incorporated

- legal department sign-offs in place

- publisher clearances procured

- font selections and style adjustments made and secured for camera-ready production phase

- preproduction edit complete

ESTABLISHING A SYSTEM OF FORMAL REVIEW

The complexity of today's business environments and the fallibility of human beings make a review process for writing advisable. Draft writing implies that some sort of review takes place between drafts and that writers receive feedback. To date no technology exists to replace the role of the human reviewer in evaluating, guiding, and directing writers during the writing process. Most writers themselves recognize the need for document reviews and welcome the insights and comments of others. Although many types of reviews are possible, **formal reviews** during the life cycle of a document usually prove the most effective.

A formal review process can be instituted through policies and procedures for submitting writing to a review team, or it can be done by establishing an editorial committee. You may find that you cannot review all of the writing your employees produce, although you might wish to. Many organizations rotate review responsibilities among managers or establish

separately managed departments that are responsible for review. Sometimes reviewers consist of other writers or mixtures of people from various departments. Most of the time, you will want to ensure that a variety of organizational perspectives, such as those of the legal department and marketing, are represented on review teams that review major documents.

To establish a review, you must attend to or delegate responsibilities for scheduling a time and place, providing copies of the writing in advance, choosing a moderator, and ensuring that all participants are present. In addition, you should be prepared to manage conflicting points of view, resolve contradictions, provide easy access to research sources, and control the length of review sessions. If the need arises, you may have to discuss the quality of review comments with writers and establish priorities for incorporating them. Once a review is complete, you may also need to assist writers in recasting comments in their own, or some other, style.

In *The Professional Writer* (1992), Alred, Oliu, and Brusaw describe the most prevalent types of formal reviews. They include the following types, most of which are performed during the draft‑writing stage of information development (summarized from Alred, Oliu, and Brusaw 1992, 247):

- **Documentation plan review**—also called the **information plan review** during which those involved in planning, writing, and producing information meet to review the plan for accomplishing their goals. Others who have an interest in the information (such as product managers and marketers) may also attend.

- **Peer review**—in which members of a writing team review one another's work.

- **Technical review**—in technical writing environments, members of the technical staff review the work of technical writers.

- **Customer service review**—where customers/purchasers of the information, or those who maintain it, review the writing.

- **Marketing review**—where those who sell the information or commodities addressed in it review the writing.

- **Edit review**—where an editor reviews the writing.

- **Management review**—where an individual manager or management team reviews the writing.

- **Legal review**—where organizational lawyers or legal staff review writing to ensure product liability, trademark clearance, and business conduct compliance.

In each type of review, the emphasis is on improving the quality of a document by improving its accuracy, strategic direction, completeness, readability, and mechanical qualities. Reviews can occur at various points in the draft-writing cycle, although it makes sense for some types of reviews (such as technical reviews) to occur earlier, whereas others (such as legal reviews) should occur when a document is nearer completion. Because the different types of reviews can focus on different aspects of a document, it is wise to schedule a variety of reviews or at least to invite different types of people to review drafts. A product manager's interest in a document will probably differ significantly from a lawyer's, although both may share the goal of wanting to see the information in the document disseminated to customers.

Preparing for Reviews

The best time to prepare for document reviews is before a writing project begins. During the planning stage (and perhaps as part of the information plan described in unit 3) reviews can be scheduled at strategic points during the writing cycle. For example, an information planner might schedule a management review of a document at the second draft stage. This will allow managers to comment on the strategic direction taken in the document once its text is established and while there is still time to adjust the document. Similarly, a production edit or review might be scheduled before shipping a printed document to the printer. This will ensure that nothing has been overlooked during the writing and preparation stages.

Inviting Participants

Often referred to as **review teams**, participants in reviews should represent varying interests or expertise in areas relating to what is written. Those in charge of writing or managing a document's writing should almost always be invited to attend. In addition, specialists such as editors, document designers, graphic artists, and review facilitators may also be invited to participate in reviews. Those who participate should be expected to review writing ahead of time and, if requested, supply comments before the actual review date. Review facilitators should be willing to assume responsibility for providing and disseminating drafts, setting up and moderating reviews, taking notes, and following up with participants to ensure closure on open issues. A typical list of invitees for a review of a small document produced by an engineering firm might include reviewers such as the document's author(s), an editor, a project manager, and a lead engineer. Others, such as the company lawyer, may become involved later in the writing cycle.

Allowing Review Time

Once reviews have been scheduled and participants identified, ample time should be allowed for participants to review drafts intelligently. *Ample time* should be construed as the amount of time it will take an average person within the organization to review a document of **xxx** pages under current working conditions. Organizations with fewer people, where employees tend to play more that one role, will require more review time. Allowing too little time for review can result in off-the-cuff comments generated spontaneously during review sessions. Besides being an ineffective use of review time, such comments seldom yield satisfactory results. Allowing too much time, on the other hand, seldom encourages reviewers to submit review comments ahead of time, and usually results in wasted time.

Conducting a Review

There are a variety of proven ways to conduct successful document reviews. Most successful reviews, however, share some or all of the following ingredients:

- someone to plan, announce, and orchestrate the review

- someone to record and disseminate the results

- someone to moderate the review session and resolve conflicts

- a set timetable that is adhered to

- a mechanism for tracking comments and checking to see how they are incorporated for the next review

Today, document reviews may be accomplished online, via satellite, through teleconferencing, or in other settings that take advantage of modern information technologies. Never before have writers had so many opportunities to perfect their writing and to share responsibility for its accuracy.

REFERENCE

Alred, Gerald J., Walter E. Oliu, and Charles T. Brusaw. *The Professional Writer: A Guide for Advanced Technical Writing.* New York: St. Martin's Press, 1992.

REVIEW QUESTIONS

1. How are draft writing and information planning related?

2. What is the difference between freewriting and chaining/webbing?

3. How can you use outlining to check the progress of drafts in a writing project?

4. What are the advantages of requiring approval drafts of important documents?

5. How do managers sometimes complicate the draft-writing process for employees?

6. How can managers assist employees in developing drafts?

7. What is meant by establishing a formal system of review?

8. What details are associated with arranging and carrying out a formal review?

9. List three benefits that can be derived from a team approach to reviewing.

INTEGRATING QUESTIONS

1. Because of habit, scheduling, or preference, many writers do not write drafts. As a manager, what can you do to change this tendency in your employees?

2. What role should managers play in establishing document reviews and in participating in them?

3. What expectations would you communicate to employees concerning the content of first drafts?

SUGGESTED ACTIVITIES

• For the next substantial document that you write, plan a sit-down review and invite anyone who has an interest in the document to be reviewed. Record and track progress on the changes that are recommended.

• Discuss the concept of peer review with your employees. List what the employees identify as "pluses" and minuses" associated with the idea.

SUGGESTED READING

Alred, Gerald J., Walter E. Oliu, and Charles T. Brusaw. "Review and Evaluation." In *The Professional Writer: A Guide for Advanced Technical Writing*. New York: St. Martin's Press, 1992.