

UNIT 8: EDITING AND CHECKING INFORMATION

OVERVIEW

In this unit, we discuss editing and proofreading as ways to produce written products that are clear, concise, and correct. Our goal is to convey the importance of editorial standards and the manager's role in enforcing them. Establishing editorial standards and procedures can encourage employees to aim for excellence in their written presentations. Providing employees with writing resources, such as style guides and grammar books for reference, can also encourage individual initiative.

We will distinguish between editing and proofreading, including the differences between copyediting, substantive editing, and technical or specialized editing. You will learn to recognize the value of different types of editing and understand the kinds of writing problems that can be detected in each type.

OBJECTIVES

After completing this unit, you should be able to:

- recognize and describe errors commonly found in writing
- differentiate between copyediting and substantive editing
- apply strategies for correcting errors and rewriting documents
- devise editorial policies for your department or work group

DISCUSSION

Many educators and business analysts fear what they call *declining literacy* in the workplace, a phenomenon they detect in employees' inability to write and read even simple memos. They argue that declining literacy is exacerbated by poor standards or, worse, no standards at all, because managers rely on colleges and professional schools to train workers to read and write, and do not see it as their responsibility to do so. Although much of the concern

about declining literacy is overstated, as a manager, you do share responsibility for educating employees. Practically, you have immediate responsibility for the image of your department and your organization and the accuracy of the information it disseminates through writing of those who work for you.

WHAT IS EDITING?

Editing is the process of improving writing by specialized review and checking. Although anyone who can read a document can, potentially, edit it, the process of formal editing has become associated with **editors**, professionals who review documents and provide detailed comments on their structure, contents, accuracy, style, tone, grammar, spelling, and other pertinent areas. Editors in today's business environments may work alone or in teams; may be part of larger, multidiscipline groups of reviewers; and may edit according to defined processes, or may have to create processes for editing as they go along. Under certain conditions, managers in some organizations may serve as editors. In other organizations, managers may have responsibility for seeing that their employees' work receives editing from some other source.

For many managers, the issue of editorial guidance for employees is a sore spot. Managers who believe that all professional employees should know how to edit their work may choose to address only editing issues associated with nonprofessional-level writers. For example, one manager hired a professional editor to proofread the correspondence written by his secretaries, while he ignored the writing of professionals on his staff! Other managers assume responsibility for editing everything written by those who report to them, and may, as one manager did, spend hours meticulously marking up employees' memos and reports. Most managers today probably make one or more of the following assumptions about editing and who provides it:

- Editing is the responsibility of the employees themselves.
- Editing is my responsibility.
- Editing should be done by a professional editor.
- Editing can be purchased if we find that we have a need for it as we go along.
- Editing is only important for certain, sensitive "outside" documents, and it is our job to provide it for such documents.
- Editing is a frill we cannot afford.

Managers who hold one of the first three assumptions are generally willing to commit time and resources to the editing process. They see the ongoing value of the editing process on work produced by their employees. They may also have seen the effects of lack of editing in poor-quality documents, and they may be motivated to improve quality.

In previous units, you learned about the importance of reviewing documents and of planning for periods when documents can be reviewed. In some senses, an edit is like another type of review in that writers distribute writing and receive feedback on it. Formal editing, however, differs from other types of reviewing because it focuses almost exclusively on the document itself, avoiding issues associated with the content of the document.

Substantive Editing Versus Copyediting and Proofreading

The editor's role differs from that of other reviewers of a document. Most editors will admit, however, that the role they play during some periods in the life of a document may differ from the role they play at other times. For example, an editor may be asked to review the outline for a piece of writing to comment on the organization and flow of information in the planned writing. Later, the editor may perform both a substantive and a copyedit on the document, and may check the camera-ready copy of the document before its final printing. As a manager either performing editorial tasks or hiring someone to provide editing, you should know the difference between different types of editing, and you should know when each type is appropriate.

Editors generally use the terms *substantive edit* and *copyedit* to describe the nature of the editing they provide at various points in the editorial process. A **substantive edit** is one in which an editor reviews the structure of the writing and may comment on the completeness,

accuracy, organization, consistency, and appropriateness of its content. In technical environments, the term **technical edit** is sometimes also used to describe a facet of substantive editing that includes verifying the technical truth of what is written.

Copyediting describes a detailed mechanical process in which an editor performs a line-by-line markup of a manuscript to prepare it for publication. Editors look for spelling, grammar, syntax, capitalization, correct use of quotations and citations, and general internal consistency. Discrepancies or possible inaccuracies should be identified and queried. Proofreaders check dead copy (earlier versions) against live copy (revisions) to ensure that changes have been implemented and errors corrected. Sometimes the line between proofreading and copyediting blurs when proofreaders look for conformance to in-house style standards.

Often, editors use prescriptive checklists to ensure that certain writing activities have been performed correctly. Such a checklist may serve as a reminder to the editor to verify often-overlooked items such as page numbering. It may also direct writers in establishing high quality during the initial writing stages. Because such checklists can vary according to individual project and editing needs, and because they are implicitly linked to the standards that an editor may establish for writing projects, editors often devise and revise individual checklists.

On occasion, managers may also perform certain editorial functions. Although managers are not professional editors, they may be asked to provide cursory editing and document review. A basic understanding of grammar and syntax aids in this process.

Detecting and Correcting Common Errors

As a manager, you will find that error patterns emerge in employee writing. Such patterns may be detected in the writing of certain individuals—such as words that are habitually misspelled or misused—or among groups of people. The errors may affect the content and meaning of what is written as well as the presentation style of the writing. Sometimes, such patterns occur when information that is wrong to begin with is copied into other documents or disseminated online. If one person provides an incorrect organization chart, for example, that chart, unless corrected during an edit, will be incorrect in any additional documents. To correct errors, you and your employees must be able to recognize them and to provide appropriate substitutes.

In *The Manager As Editor* (1981), Louis Visco identifies some errors commonly discovered by managers who edit employee writing. These errors include: faulty logic and misplaced emphasis, incorrect parallelism, misplaced modifiers, misplaced or mismatched subjects and verbs, wordiness, and jargon (ibid., 80–94). Visco notes that many managers and employees are not aware of how to correct such errors, and often cannot detect them in the first place.

Faulty Logic and Faulty Emphasis

Faulty logic and faulty emphasis occur when writers fail to detect flaws in the logical relationships implied through words in sentences. For example, a sales representative who writes that, "The backfiring problem occurred in the customer's assessment of the tailpipe wiring mechanism," fails to realize that the "customer's assessment"—a written or verbal report—cannot possibly contain a "backfiring problem." The faulty logic in the sentence inheres in the writer's incorrect grouping of words into sentences to form relationships. The sentence should have read: "The backfiring problem, according to the customer, occurred in the tailpipe wiring mechanism" or "According to the customer, the backfiring problem occurred in the tailpipe wiring mechanism."

Similarly, writers sometimes distort cause and effect relationships, which results in misplaced emphasis within sentences. For example, "Because Mr. White is on vacation, your inquiry was forwarded to me," is better than "Mr. White is on vacation, and your inquiry was forwarded to me" (ibid., 82).

Incorrect Parallelism

Incorrect parallelism occurs when writers fail to see logical similarities in types of language constructions used. A writer who includes a list of tasks, for example, may create incorrect parallelism in the list by failing to begin an item in the list with the same part of speech as other items. The examples below show incorrect and correct versions of one sentence.

Incorrect: I would like all employees to communicate the following information to our secretaries: name, age, coming on board.

Correct: I would like all employees to communicate the following information to our secretaries: name, age, date when you started with the company.

Misplaced Modifiers

Misplaced modifiers occur when the words that refer to other words in a sentence are misplaced so that they distort meaning. A misplaced modifier is usually easy to detect and often easy to correct if the distortion created by it proves humorous or ludicrous, as in these examples:

Incorrect: Burly and smelling of honey, the man watched the bear from a distance as he unfurled his half-open knapsack.

Correct: From a distance, the man watched the bear, burly and smelling of honey, as it unfurled the half-open knapsack.

Incorrect: The hikers dragged behind them small red backpacks, tired and overwrought.

Correct: The tired, overwrought hikers dragged their small red backpacks behind them.

Misplaced or Mismatched Subjects and Verbs

Subjects and verbs need to be compatible to avoid confusion. Some writers misuse these parts of speech by failing to use the singular forms of verbs with singular subjects, and the plural forms with plural subjects in sentences. They may write, for example, "The committee of citizens agree on the proposed rate increase," when they mean to say, "The *committee* of citizens *agrees* on the proposed rate increase." Agreement errors commonly occur in constructions similar to that in the sentence above, where another word or phrase (in this case, "of citizens") intervenes between subject and verb.

Wordiness

Wordiness is often a symptom of an ill-chosen topic. Nervous writers disguise discomfort with a topic by burying it in words that fail to express clearly what the writer has to say. Sometimes, writers have not done the research necessary to achieve a level of comfort in writing about a topic. At other times, writers may not fully understand a concept and attempt to write around it by supplying "filler words."

The sample below shows a sentence revised by an editor for succinctness.

Before: The root cause of the marketing dilemma was attributable to the lack of support needed in order to market the product forcefully to its customers.

After: We lacked the support for marketing the product to customers.

Colloquialisms and Jargon

Colloquial English, nonstandard, informal English that is often spoken, may create problems for audiences when it is written. Although it is often more colorful than standard English, colloquial English may be regionally or culturally oriented, and therefore subject to misinterpretation by people who do not know it. Expressions such as "a-okay," or "no can do," and certain words such as "jackpot," "long shot," and others are examples of colloquial usage that should be avoided in formal writing.

Strictly defined, **jargon** is like colloquial nonstandard English. Unlike colloquial English, however, jargon is often used in business environments to convey meaning, and this makes it difficult to ignore in writing. Writers often lapse into jargon associated with a particular workplace or industry. Specialized technical vocabularies, for example, exist for concepts that have no suitable equivalents in standard English—concepts or specialized names such as "CPU" (control processing unit) or "logon" from the computer industry. At times, and with certain audiences, jargon or other specialized language is appropriate. The inappropriate use of these specialized vocabularies for audiences who will not understand them results in **technical jargon**. You should suggest replacing or clarifying jargon when you are editing a document if you know or suspect that the terms will be inappropriate to the document's target audience.

Detecting Other Errors

Obviously, writers can create other types of errors that you will encounter when you edit or read documents. To complete some editing tasks, you will need to address punctuation errors, spelling errors, dangling modifiers, pronoun-antecedent disagreements, stylistic errors,

and others. In addition, you may find that you are asked to resolve issues such as whether to use the second-person "you" form in writing, whether split infinitives such as "to finally approve" are acceptable, and so on.

To assist yourself and others in detecting errors, you should keep grammar and usage books on hand and refer to them when needed. *The Chicago Manual of Style*, the *Government Printing Office Style Manual*, Fowler's *Modern English Usage*, and Strunk and White's *The Elements of Style* are commonly used as reference books by editors in modern business environments.

Delivering the Results of Editing

Delivering the results of editing can be more difficult than doing the editing itself, particularly if your comments are negative. If you are a manager editing an employee's writing, delivering comments can prove especially difficult because of the implicit authority that you hold over the employee. Even if your goal is to improve the employee's writing abilities, comments can often be construed as unfair criticism of the employee's work.

Clearly established guidelines discussed in this unit and in unit 7 will help you deliver comments in a measurable and reasonable manner. If you have established a list of words to avoid, for example, you can point to that list in editing without making your criticism of the employee's diction too stringent. If an employee repeatedly makes the same grammatical errors, you can provide a reference book for the employee to use, and your suggestions will usually be heeded.

You should avoid emotional language or direct criticism of an employee when delivering editing comments. Comments such as "This is unreadable!" or "Where did you go to school?" belittle and embarrass employee writers and serve little purpose. In addition, if employees have not been hired specifically to write, or if writing assignments are not identified as part of their performance plans, they may challenge your right to edit their documents.

ESTABLISHING EDITORIAL POLICIES FOR YOUR ORGANIZATION

Managers whose organizations lack them should consider establishing editorial policies that can be used by all writers within the organization. Companies that do not have corporate publications, public relations, or writing departments tend to lack such standards. In some companies, the effects are only subtly felt; in others, the results can be more serious.

A company that receives complaints from customers who have trouble using products, for example, may be suffering because instructions that tell the customers how to use the product are poorly written. Image problems can occur for companies if their image is not clearly and consistently conveyed through the company-generated literature. Even legal problems can sometimes be traced to a lack of writing standards among those writing official documents for the company. Legally binding documents, such as contracts and warranties, should receive a legal edit or review.

Editorial policies and standards, collections of guidelines, and advice for writers can reap benefits for companies by ensuring consistency and clarity in the company's official publications. They can also improve on-the-job performance by improving the quality of internal memos and other informal writing through which employees share and receive information and take instruction.

To devise editorial standards and policies for a company or group that does not have them, you should keep the following suggestions in mind:

- Before you start, determine the extent to which standards and policies are needed. Then draw up them up. Some companies do not need detailed policies and standards, others may.
- Always present the "business reason" that underlies your standards. If you convey the need for standards in financial terms, or if you can show how they will improve the company or its products, you will convince more people to follow the standards and policies once they are in place.
- Use concrete examples that show why there is a need for standards. You can do this without embarrassing the authors of any examples that you might offer as evidence.
- Seek upper management's approval of any standards that you may devise or implement.
- Make sure that the standards and policies are collected in a separate, easily accessible document that is available at all of your company's locations.
- Publicize the standards and policies once they are in place, and encourage employees to learn and use them.

REFERENCE

Visco, Louis. *The Manager As Editor: Reviewing Memos, Letters, and Reports*. Boston: CBI Publishing Co., 1981.

REVIEW QUESTIONS

1. In what ways do managers share responsibility for the accuracy of employee writing?
2. What is the difference between substantive editing and copyediting?
3. Describe an instance in which legal editing might be necessary.
4. Describe three kinds of writing errors commonly found where you work, and identify at least one strategy for correcting each.
5. What kinds of writing problems can be corrected fairly easily by employees, given the appropriate writing resources?
6. Describe three types of writing resources that you could make available to employees who write regularly.
7. Suggest strategies for addressing the following types of problems in employee writing:
 - failure to stick to the topic
 - persistent punctuation errors
 - inaccurate technical data
 - poor organization

INTEGRATING QUESTIONS

1. Other than copyediting, what types of editing should managers engage in when reviewing employee documents? Why is it sometimes necessary to edit for perspective?
2. What role might automated grammar and style checkers play in the editing process?
3. Louis Visco suggests in *The Manager As Editor* (see Suggested Reading) that managers are responsible for the technical accuracy of documents written by employees. What is meant by the term *technical accuracy*, and is it reasonable to expect managers to be able to edit for technical accuracy?

SUGGESTED ACTIVITIES

- Submit one of your department's reports to a professional editor for editing. Then try editing the report yourself. Note differences in your approach and that of the editor.
- Edit a page of your daily newspaper two times: first, to check copy, and then to judge the placement and value of information.

SUGGESTED READING

Visco, Louis. *The Manager As Editor: Reviewing Memos, Letters, and Reports*. Boston: CBI Publishing Co., 1981.