Corporate Communication: managing a large government editing project

by Peter Riches, Principal Consultant, Red Pony communications group

Note: This paper was written with the help of my colleague at Red Pony, Andrew Eather.

Winning a substantial government project provides a great sense of accomplishment and – depending on the size of the project in relation to your own resources – possibly a sense of terror too. Winning the job is one thing, but now you have to deliver.

If you've successfully tendered for the job, you will be very much aware that you have entered into a contract with some very specific and most likely very stringent requirements that you must fulfil. On the positive side of the ledger, your client isn't going to go broke. (Although it doesn't necessarily follow that they will be in any hurry to pay you either. But we'll talk more about this later.)

1. The people

As anyone who has ever worked as a consultant will know, once you join the project you are often the low man on the pole in terms of clout. Everyone else has been working on the project longer than you have and they may not appreciate a Johnny-come-lately interfering with their flowery formatting and deathless prose. Also, while their boss will be around after the project is over, you won't be.

That said, your job is not to make friends, but to provide a quality outcome for the client delivered in a professional manner. I'm not suggesting that you go out of your way to antagonise people or criticise their work, but rather that you keep an eye on the bigger picture of what the project needs to achieve and how your skills as a writer and editor will contribute to a quality outcome.

I believe Lisa is going to talk a little more about how you can manage these relationships in a moment.

A good starting point is to identify who in the project team will be responsible for delivering each component of the document, and establish a timeline for delivery of the material. If you can meet with the authors to establish realistic timelines that is even better, as you will be able to get some idea of what pressures they are under and what deadlines are likely to be achievable from their perspective. This also offers an opportunity to provide some explanation of the review and editing process, particularly the time you need to turn around each section as it comes to you.

Something I can't recommend highly enough is to try and identify a central point of contact for the project – a person through whom all your correspondence can be channelled. This can be extremely handy if they have the authority to put a fire under recalcitrant contributors. If they don't, or if they are simply too busy with other matters, it can be better to establish your own chain of communication with contributors if the client will allow it.

It's great only having to deal with one person for the materials you need to do your job, but only if they're on top of the situation and understand your needs. If not, then that person can actually be a handicap.

2. The schedule

I have already briefly mentioned having a project schedule. If the job does not already have clearly established milestones and deadlines, these should be negotiated with the client <u>before</u> work commences. If there is an existing schedule, it probably won't have the degree of detail you will need for undertaking the editing component.

At Red Pony we prefer to develop an Excel spreadsheet for tracking the input to large documents featuring multiple authors. In this we record the name and a reference number for each section or component in the document, the author responsible for delivering this content, and the relevant date – first draft, review time, second draft or author's review, final draft.

Try to stagger delivery times so you don't get everything at once. Also, it is good to be able to send materials back to authors once so they can review and approve changes, as well as to give them the opportunity to respond to any questions and clarifications you might have. In some projects this often ends up as a last minute scrabble, so build it into your project schedule if you can.

Depending on the type of document, there may also be a requirement for additional reviews of the final content – for example, a technical review or management review. Be sure you capture all of these in your schedule, allowing sufficient time for each as well as notifying the people involved in the reviews as to when their input will be required.

It should be made clear to the client that there <u>will</u> be implications for missing these milestones – for example, the project may have to be extended beyond deadline. Or, if the deadline cannot be moved, you may have to bring in extra resources (for which the client will be bearing the cost) or deliver a document of diminished quality.

While these time pressures sometimes cannot be avoided, editors may often fall victim to their lack of influence within the organisation. Project managers may take the path of least resistance and dump the turnaround pressures on the editor because you are not seen as integral to the 'critical path' and can absorb the slack. By establishing timelines and deadlines at the start of the project, you will make the project manager think twice about dumping work on the editor at the last minute if they know this is going to have a direct impact on their budget.

3. The template

It can be like herding cats trying to get all contributors to a project – many of whom you may not even meet – to stick to a common set of styles within a single Microsoft Word document. Of course, you can have your meeting at the start of the project and establish a robust template or set of templates which everyone then agrees to use. Getting all the contributors to actually stick to a template and only the styles within it, on the other hand, is another matter altogether.

As editors I'm sure most people here will have had that experience where they open a new Word document a client has sent through, only to find a depressingly long list of styles, formatting inconsistencies and various other abominations. You spend the first few hours formatting the document and trying to whittle down the style list to something manageable rather than reviewing the words themselves.

One way we have addressed this issue in the past is to create a set of styles in the template then use the nifty little feature in Word that restricts the styles available to the set you have established. This means whenever someone copies content into that document from another, rather than bringing over the baggage of all the styles in the source document, everything comes in completely unformatted; that is to say, using the default ‘Normal’ style in your target document.

Sounds good? It can save hours of formatting, but there are a couple of drawbacks. Firstly, it doesn’t work for pre-Office 2000 versions for Windows, or the latest version of Office for Mac 2008. As Red Pony is a Mac-based workplace, this oversight on the part of Microsoft has been the source of some consternation. However, because we use Macs we can also run Windows through the PC emulator, and get around this little hiccup. The other drawback of restricting the styles in a document is that if the project is still at an early stage it may be more of a handicap if new styles need to be introduced as the project develops in complexity. I’d suggest you build your template, and keep track of any changes with a style guide to preserve consistency as you go.

4. The technology

At Red Pony we have found using an online project management application with a file exchange component to be particularly beneficial in establishing document version control as well as facilitating client communications. We use Basecamp (basecamphq.com), for which we pay a small monthly fee. There are a number of similar services out there, but this one works very well for us.

Version control in any large editing project is vital, and all sorts of problems start to arise when different versions of different documents are flying between a dozen different people using a variety of email clients. Having a central point for document exchange – backed by a simple and documented process of how it is to be used – can save you hours of work trying to track down the latest version of a document containing those vital changes. It also prevents your email getting clogged with large files.

Another handy little application we use is called Harvest (getharvest.com), an online time tracking application. If your business charges on an hourly rate as Red Pony does, it is great to be able to easily track the time spent on various project tasks by different people, especially if you have engaged other editors who may be working remotely. With Harvest we can then generate a timesheet or even an invoice, showing exactly who did what and when on the project. This is a great saver in terms of the (unpaid) administration work involved in running your business. Again, there are other time-tracking programs out there, including some free ones, so it’s a matter of finding a solution that meets your needs.

5. The remuneration

One final thing I want to talk about is payment. First up, the time to negotiate terms for payment is before you sign the contract. If you are tendering for the work, be sure to read the terms of the Request for Tender (RFT) carefully. You may discover that unless you include any objections to the terms of the contract in your tender response, you will have assented to the full terms of the contract simply by submitting your tender.

So, read the document carefully and if there's anything you're not comfortable with, simply note the relevant clauses and say you would like to negotiate over them. Don't presume they will weed you out as a troublemaker – every big firm does it, and so should you. In fact, the absence of any objections to the standard terms of the contract can be a warning sign to the issuer of the tender that a respondent is inexperienced.

I learnt this lesson when Red Pony won what for us was a fairly large project for the Victorian Government. I had included our standard terms in the proposal we submitted, which state that we will issue an invoice at the end of each month, to be paid within 14 days. However, in the contract I actually signed, as provided by the client, the payment terms stipulated that payment was only to be made at the conclusion of the job. Now, as the duration of the job was initially anticipated to be three months, this didn't seem like it would be a big problem. However, the timeframe was steadily pushed back to six months through the course of the job.

It can be frustrating to devote hours to a job in June if you're not seeing any payment until November. In fact, it can be crippling to a small business. You want to be able to issue invoices and get them paid throughout the course of the job, whether it's monthly, fortnightly or even weekly. This is a more than reasonable request for a small business to be making and a government department should not unreasonably withhold their agreement to this variation. So, make your conditions clear from the outset and read the contract carefully before you even start work on the tender documentation.

On a related matter, it can be a very good idea to find out the name of the person who is actually authorised to pay you. Especially in a large organisation or government department, invoices can very easily get lost in the system as they are forwarded from one business unit to another.

Some service providers have been known to physically present their invoice at the desk of the individual authorised to pay it so there can be absolutely no doubt that it has been lodged. You can decide for yourself whether this somewhat confrontational approach is warranted.

Incidentally, it became government policy in Victoria in just the last couple of years that suppliers were entitled to claim penalties to the tune of 12 per cent of the value of the invoice if not paid within 30 days. However, I'd be very reluctant to push for that and still expect any further work to come my way from that source.

6. The summary

So here are the take-home messages I'd like to finish on by way of a summary.

- Firstly, find out who is in charge (that is, who can make decisions) and if possible channel all official communication for the project through them.
- Create a project schedule and stick to it. If something changes that affects your schedule, communicate it to the team and revise the schedule as necessary.

- If possible (and if you are using Microsoft Word), establish a template early in the project and get all authors and editors to use it. Train them if you have to, and lock down the styles if you can.
- Leverage technology as much as possible. Technology can be your friend and there are many low-cost tools out there that can save you time, money and heartache.
- And finally, read the contract carefully so when you get on the ride, you know what you've signed up for. Take particular note of the payment terms, and find out who will be paying your invoices and, if you can, deliver the invoice directly to them, using whatever means at your disposal.

Thank you and good luck.

About the author

Red Pony founder and Managing Director, Peter Riches, has more than ten years experience developing award-winning IT and multimedia projects in Australia and overseas. He has managed a range of high profile projects for government and corporate clients, including tenders, funding submissions and public reports.