

## Tips for Obtaining Effective Reviews

Encouraging reviewers to respond to review requests and review your work can seem a daunting and thankless task. The difficulty associated with reviewers is a common complaint amongst technical communicators. However, rather than throw up your hands in despair, there are a number of techniques you can use to help ensure you receive the review you need.

In my experience, reviewers respond positively to clear guidelines and a firm, but supportive approach. In a recent project I worked with a team of busy web developers who had no experience with reviewing technical documentation and for whom documentation had never been a priority. This article discusses some of the techniques I found useful in obtaining the review I needed.

### Before you start – setting the scene for review

One of the pre-requisites for a successful project is to establish a workable review process and objectives before you start the project. This will help prevent problems at a later stage.

#### **Establish a defined review process**

At the start of a project, ensure that there is an agreed review and sign-off process in place.

Each document you are working on should have an ultimate ‘owner’, who is responsible for ensuring that it is properly reviewed and signing off the contents. Work with all parties involved to create a review cycle (how many drafts need to be submitted and to whom) and an agreed list of reviewers, who will be responsible for reviewing your work.

A useful technique for indicating who needs to review your document is to add reviewers’ table to the cover page of your document. See Figure 1 below.

Version history

Version #	Date	Description	Reviewers
v 1.1	5 <sup>th</sup> Feb 2007	Outline	Jim, John, Ruth
v 1.2	6-Feb 2007	1 <sup>st</sup> draft	Jim, James, Janet, Ruth, Pauline
v 1.3	9-Feb 2007	2 <sup>nd</sup> draft	Ruth, Joan, Jim,
v 1.3	19-Feb 2007	3rd draft	Ruth, Joan, Jim,

Have you reviewed this document?

Name	Role	Outline	D1	D2	D3
Jim	Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ruth	Project owner	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
John	Project manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pauline	Developer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please check the boxes next to your name, to indicate which version you have reviewed.

Figure 1: Reviewers Listed on Document Cover

A clearly defined review process and the buy-in of all parties involved will go a long way towards ensuring that you ultimately receive the review you need.

**Establish your credentials**

The perception of your role and the value you offer is important when it comes to reviewing your work. There may not be one simple answer to what you do or the value you provide – but you need to have enough different answers for the different type of reviewers to earn their understanding of the importance of reviewing your work.

For example:

- The value of what you do to the engineer/developer may be that you help organise and make clear their thought processes and work they have been doing. If they perceive this value, it will be an incentive for them to review your work.
- Your value to a marketer or product manager may be that you understand the customer/or can take the customer’s perspective – you can take technical and internal stuff and make it make sense to external customers.

If reviewers understand the value you add to their job functions or the company, they will be more likely to engage positively in the review process.

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**TIP:** The best way to communicate your value is through the professional way in which you engage with others in a project and by the quality of what you deliver.

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**Understand the context of the review**

Review is not a once-off event. It may occur on several occasions during the documentation drafting cycle – and later on, on a regular basis during maintenance and update stages.

Consider your reviewers. Are you one amongst many technical communicators that are churning off drafts and sending them to the same list of reviewers? This can quickly lead

to overload for a reviewer and delays in their response, if you have not effectively prepared your reviewers beforehand.

Ask yourself where your review sits in the company's product development or sales cycle. For example, sending off a document to review just prior to a scheduled software release or urgent customer delivery may not be the best timing, as developers may be working frantically to release the software.

Often, obtaining the right review response is about ensuring that the correct review processes are in place and that the timing of your review request is optimised for the person you are requesting the review from.

### When Asking for Review Provide Clear Guidelines

When sending out drafts for review make it clear to your reviewers what you expect them to do.

#### Understanding how we review

Readers approach a document with a purpose. This may be to learn how to do a task, solve a problem, for entertainment or education. We approach a document with expectations and preconceptions. We rely on what we already know to make sense of any new material we read.

Help your reviewer by clarifying the objective of their review and providing guidelines as to how you want them to approach your document. The purpose may be to find faulty information, fill in gaps or sanity check a document.. Your reviewer may already have read the same document several times in the past and may only be interested in any changes.

Providing clear guidelines can help set the right frame of mind and approach to your document.

#### Let reviewers know why you need their review

Often authors simply send a document to a group of reviewers, without explaining the purpose of the review. Help your reviewer, by telling them why their review is important. For example:

- To a specific engineer: "I need you to look at my description of the architecture and system diagram, *to make sure the components and processes are clear.*"
- To the legal department: "I need you to review the statements of compliance and other performance statements, *to check that these conform to our legal requirements.*"

These examples provide specific guidelines to help your reviewer understand what they need to do and why this is important. By making the review specific, you help to focus their efforts and obtain the specific response you are looking for.

### **Let reviewers know how you want them to mark up their review**

Provide clear guidelines as to how reviewers should write up their comments. For example:

- Marking corrections in red ink on a printed copy
- Using revision marks or comments in a source document to track changes
- Sending their review in a separate email.

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**TIP:** A useful technique is to ask multiple reviewers to combine their comments before sending this to you. This ensures a more consistent review response and avoids conflicting messages.

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### **Let reviewers know when they need to return their review**

Set dates for the return of reviewer comments - do not leave this open-ended or you may never hear back from your reviewer. Schedule in review well in advance of when you need it. A common review practise is to add a day or two's contingency, for last-minute emergencies that tend to pull reviewers off a review task. So, if you need the review by Thursday morning, as the online help needs to be ready for production by Friday, give your reviewer until Tuesday to respond. If they miss this deadline, you will have another day to follow up.

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**TIP:** As an additional step for difficult reviewers, you could also ask your reviewer's manager to specify how much time the reviewer can spend on the review. This encourages compliance, as time has been formally allocated to the task.

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You can combine the three objectives described previously in a single email. See the example in Figure 2:

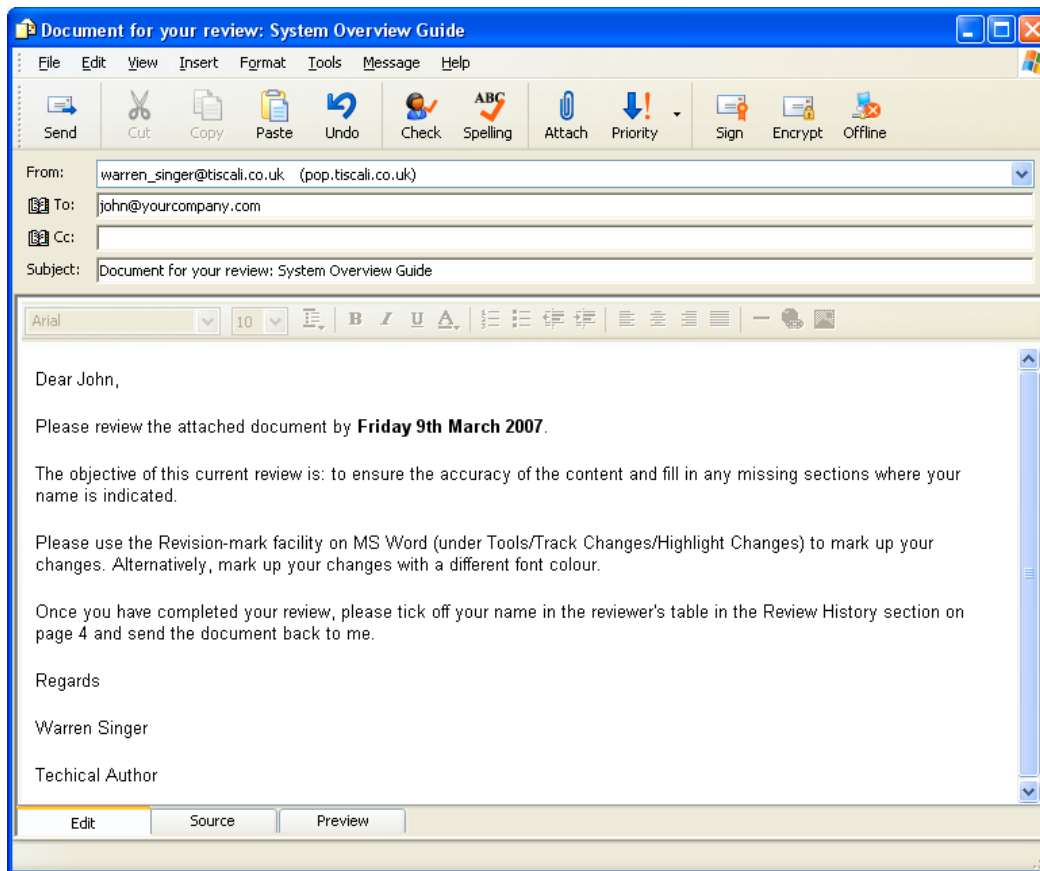


Figure 2: Email to Reviewers

### Provide review checklists

Reviewers may be more systematic in their review if you provide clear guidelines and a checklist for them to fill out or tick off when reviewing. See Figure 3. The checklist offers a structured way for reviewers to provide feedback.

**Content**

Document Component	Please check for the following:
<b>Title page</b>	Does the title reflect the contents of the document? Is the correct list of reviewers identified?
<b>Introduction</b>	Does the introduction tell you who the document is intended for? <ul style="list-style-type: none"> <li>• Does it tell you the purpose of the document?</li> <li>• Does it indicate what is going to be covered in the document?</li> </ul>
<b>Terminology</b>	Is terminology used consistently in the document? <ul style="list-style-type: none"> <li>• Are acronyms spelt out?</li> <li>• When a new term is introduced, is it explained?</li> <li>• Is the term used consistently?</li> </ul>
<b>Graphics</b>	Is the text supported by graphics where appropriate? <ul style="list-style-type: none"> <li>• Is it clear what the graphic is about?</li> <li>• Are the graphics appropriate for the text?</li> <li>• Do they help explain or describe the tasks or concept being covered in the text?</li> <li>• Is the information/layout of the graphic accurate?</li> <li>• Are there any missing graphics?</li> <li>• Does the graphic have a clear title?</li> </ul>
<b>Procedures</b>	Are procedures easy to follow? <ul style="list-style-type: none"> <li>• Have long procedures been broken down into manageable chunks?</li> <li>• Is there a logical flow to the procedures (first-to-last)?</li> </ul>

Figure 3: Example of a review checklist

**Keep Reviews Focused**

**Provide short reviews**

Expecting your reviewers to spend 3-4 hours on your document in one session is not an effective use of their time. You are unlikely to obtain clear and sharp review.

Break down your review material into shorter components that can be managed in a 40-minute session. You can do this by asking your reviewers to focus on a specific section. Most reviewers can only concentrate at an optimal level within this period, and their attention will dwindle as you ask them to spend longer than this.

An advantage of the short review is that most reviewers should be able to fit a 40-minute session into a busy week, whereas they might procrastinate and complain if expected to spend several hours reviewing your work.

**Break down the review of lengthy documents**

For longer documents, break down the review so that each reviewer can focus on a different aspect of the document. For example:

- Break down a lengthy document into manageable review chunks
- Mark up revision changes – ask them to review only the changes

Reviewers should be directed to focus on the information in the document that is most relevant and appropriate for them to review.

### **Break down the involvement of reviewers into stages**

Not all reviewers have to see all the drafts you are sending out. Break down the involvement of reviewers into stages. For example, during early document development, involve the engineers and the product managers. Only involve testing, legal and management in later draft reviews.

Concentrate on the reviewers who are most important to your document at any particular stage of the review cycle.

### **Ask for different types of review at different drafting stages**

Different stages of a draft will require different types of review. For example:

- At an **outline stage**, reviewers should be skimming through titles, focusing on the overall logic and flow between sections and organisation of the document. They should not be reading details and correcting typos.
- At a **first draft stage**, reviewers should be reading for meaning and understanding. Their focus should be on the message, rather than the specifics of sentence structure and spelling. They should be looking for places where there are gaps in information (missing sections, fields or topics) or where the message is incorrect (e.g., it doesn't actually work like that/do that – it does it like this, works this way).
- By **second draft**, reviewers should be focusing on the ability of the draft to communicate coherently and clearly to the audience it is intended for.
- By **Final draft**, reviewers should be skimming for any obvious errors, formatting, typos and other small, last-minute changes. To be most effective, you should choose a reviewer who approaches the document with fresh eyes and has not seen the draft several times before. They are less likely to miss obvious errors.

Keep reviewers focuses on what type of review is appropriate at each stage – this will also reduce the amount of time they need to spend at each stage.

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**TIP:** Specifying what type of review is appropriate at each draft stage can help reduce the need for detailed rewrites at later stages.

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## **Engage your Reviewers**

A key objective is to encourage reviewers by creating a positive experience of the review process. The best way to do this is by ensuring the reviewer's involvement.

There are many other ways to engage your reviewer. The main principle behind effective engagement is that the review task must be perceived as one of collaboration and joint ownership – of all parties involved working towards a common goal.

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**TIP** The best way to engage a reviewer is when their job objectives and performance review criteria include the quality of the documentation you produce – and when the whole team or company recognises the importance of review.

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### Appealing to a reviewer's sense of ownership

We all like to feel that we are important in our roles and have responsibility – reviewers are no different. Appealing to a reviewer's sense of ownership and achievement, or expertise on a subject can be an effective way of engaging them. For example:

- To a developer or engineer: “You are the best person to review this section as you know so much about this topic; without your review, I don't think this guide will be ever 100%.”
- To a product manager: “I know you are a real high achiever and dedicated to the quality of this product, so you'll want to make sure I've got it right.”
- To a software developer: “This is really your baby, you built it and you know it inside-out. You'll quickly be able to identify what the issues in this section of the guide are.”

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**TIP:** Use compliments and praise judiciously where appropriate. Always thank your reviewer for their contribution.

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### Motivating your reviewer

Natural human tendency is to focus on activities that stimulate or interest us. If your reviewers perceive your work as another long and boring document, what is motivating them to engage with it? If you are not fired up and motivated by what you do, why should your reviewer be?

Reviewers are more likely to be motivated to review a document they perceive to be well organised, clear to read and visually attractive, or where the writer has gone to great lengths to improve its quality.

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**TIP:** If you can make your review exciting, different in some way, fun or interesting, you are likely to interest your reviewers. Use your imagination to gain the interest of your reviewer.

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### Offering Review Sessions

This is a great technique for obtaining review from people who would otherwise not do so.

Invite a group of your reviewers to a meeting. I usually put the document up on a projector screen and keep the desks free of paper as this stops reviewers looking down at



papers and facilitates attention to what is on the screen. However, you may prefer for each reviewer to bring a printed copy of the document being reviewed.

While you present, talk through the high-level details and provide the context of each page or section you are reviewing. Your verbal explanations can often help to focus attention on important details or provide more background information around key issues.

You should ask regularly for the questions or comments. With a little prompting, the participants will start responding with comments. Allow everyone to have their say, and try engaging the more reticent members of the group through eye contact or specific questions. Try to maximise the opportunity for reviewers to interact and respond to each other – this interaction is often key to effective engagement with the subject matter.

Having participants debate and bounce off each other is a good way to pick up discrepancies in your document and areas of contention.

### **Using Customer Boards**

A customer board is an effective and cost-efficient way to obtain customer feedback. If this is a new product, project or concept, or will have a major impact on the customer, then customer involvement and feedback is essential.

Select 3-4 key customers, for example those who are closely aligned to your business, customers with whom you have a good relationship or customers who will be using the new product or service. Provide your customer with a copy of your document, and some orientating notes that outline the objectives of the product and the documentation. This is accompanied by a list of questions about the documentation and product. The customer's provides answers and comments are discussed with the customer during a review meeting.

### **Dealing with Delinquent Reviewers**

Despite your best efforts, there will invariably be reviewers who fail to respond to your review requests. If you understand why they are not responding, you will be better able to address the problem.

Reluctance to review may be for a number of reasons:

- The reviewer may be under a tight schedule
- The reviewer does not attach much importance to the review
- The reviewer finds it difficult to engage in the review task or give back useful comments
- The reviewer is trying to avoid the review – because of reasons above.

Focus your efforts on reviewers who really need to review the document - those who will make a concrete and measurable difference to its quality.

### Let reviewers know when they have missed a review deadline

If your reviewer does not respond by the agreed date, send a polite, standardised email to let them know they have missed their review deadline. See the example Figure 4:

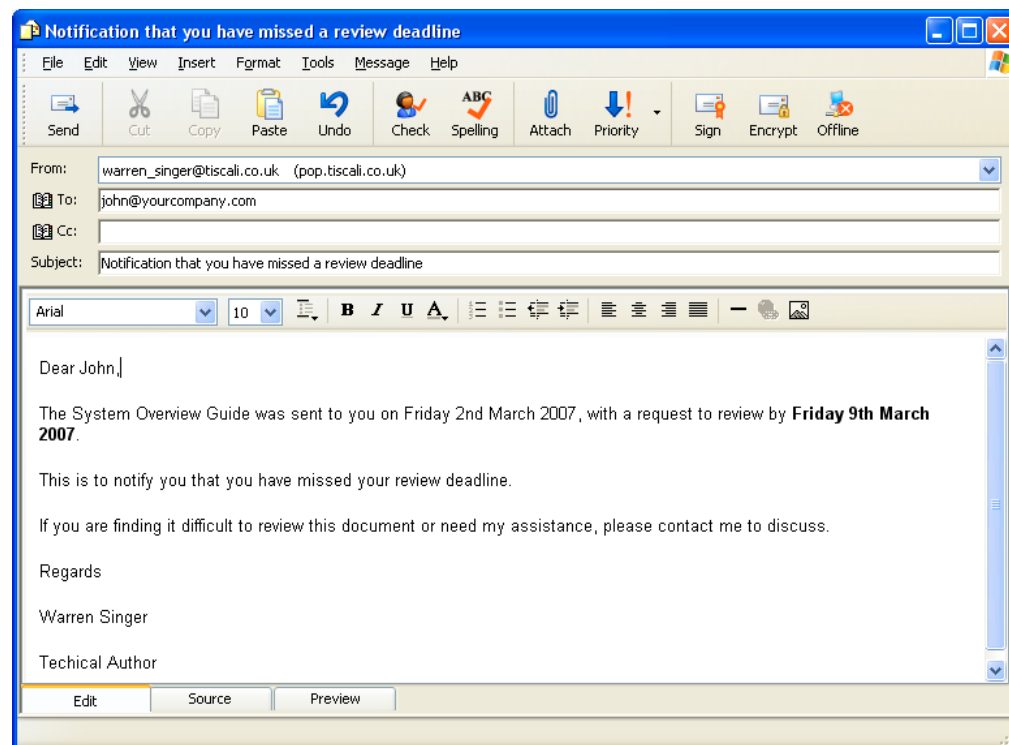


Figure 4: Follow-up Email for Missed Deadline

Note the tone of the email is formal and polite – but non-threatening. Since the email is a standardised one, your reviewer does not need to feel that it is personal - you have simply flagged up to the reviewer that they have missed their deadline and asked if you can help.

You'd be surprised how this can spur on a tardy reviewer.

### Ask the reviewer to delegate

Make it clear to reviewers that they are responsible for reviewing in time and ask them to delegate this responsibility if they cannot meet their obligation for any reason. This way, you leave ownership for the review with the reviewer. It is then their responsibility to find a replacement if they cannot meet your deadline.

### **If nothing works**

Sometimes the one person who is constantly the bottleneck in the review process or consistently fails to return their feedback in time is invariably the one person you really need to review your work or sign it off. This could be the editor, a key person who understands the system or someone with sign-off responsibility.

If this is an ongoing problem, the best approach is to discuss it directly with the reviewer as an issue that is effecting the productivity and efficiency of the documentation process. The key objective is to motivate your tardy reviewer to help find a solution to the problem. One solution you could propose is for an alternative reviewer or route to having your work signed off (this often spurs on the reviewer to find the time).

Adopting a positive, patient and professional approach to tardy reviewers is usually effective and avoids creating bad feelings between different parties. At the same time, you should always be looking for other routes to obtain the review you need, so that you are not reliant on one single point of failure.

There will be times when, despite your best intentions, a reviewer is simply not available or responsive to reviews, for factors beyond your control. A practical acceptance of this fact is the best approach. I've found it best to maintain a positive and sympathetic attitude to the reviewer and a friendly working relationship. You may need to work with this person again in the future.

### **Conclusion**

The techniques described in this article will significantly reduce the risk of reviewers not reviewing your material. It is all about knowing your reviewers and managing their expectations of the review process. The more you can take control over your reviews, the better the responses you are likely to achieve.

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