

Collaborative Engagement: Understanding the Writer and Editor Dynamic

by

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Introduction

In technical communication, knowing how to collaborate with editors is an essential skill. This applies whether you are a subject matter expert (SME), an experienced writer, or a reluctant writer—especially if you are working with an editor for the first time. This article describes the role of technical editors and discusses the writer and editor dynamic, offering suggestions on how you and your editor can thrive as a team.

Technical communication involves collaborative engagement with a team of professionals sharing a common goal, as seen in Figure 1. Teams are the “norm in technical workplaces” (Johnson-Sheehan 2024, 47), and working collaboratively requires adaptation on the part of each team member. Just as SMEs are experts in their technical disciplines, so are editors in their own domain.

Figure 1: A team at work



source: 14995841 2020

Why You Need an Editor

Technical editing involves reading from the user’s point of view. An editor evaluates a document by verifying its content, testing its usability, and offering suggestions for improvement from an objective and critical perspective (Tarutz 1992, 4). By acknowledging the role of editors and including them effectively as team members, you can improve your documentation as process and as product.

How to Work with an Editor

Technical writers and editors share a common goal: to produce “the best possible document” on behalf of the reader or user (Hollis Weber n.d.). In pursuit of this aim, empathy is important: project teams work best when their members are kind and considerate with one another. A crucial step in learning how to collaborate with an editor is to recognize that their role is a complement to what you do; an editor is not a threat to your authority; rather, they are a resource to help solve problems and improve your project.

Engaging the editor as a resource

Organizations do not need to compartmentalize editors, bringing them in only at the last stages of a publishing project. Their skillset can help ensure the overall success of your project. You can find technical editors on a variety of teams (Kelly 2023), including:

- engineering teams
- healthcare teams
- manufacturing teams
- product development teams
- software development teams
- technical publication teams

How do you benefit from having an editor on your team? As the author of *Technical Editing: The Practical Guide for Editors and Writers*, technical editor, instructor, and entrepreneur Judith A. Tarutz effectively uses a baseball analogy to communicate the role of an editor. Think of the editor as the catcher for your team. Would you play a game of baseball without a catcher? Certainly not. They are invaluable resources. So, too, are editors. Like catchers (see Figure 2), editors “epitomize the team player, whose individual glory is subordinated for the sake of the team” (Tarutz 1992, 39).

Figure 2: Catcher with teammates



source: NibbleNutz 2018

Technical editors take on various roles depending on the project, the organization, and the industry of the publication (Hollis Weber n.d.). Table 1 presents an overview of the roles of technical editors in relation to their specific tasks.

Table 1: Editor roles and tasks

Editor roles	Editor tasks
determine style standards	establish and maintain standards for the organization's published output and projects
	identify and profile target audiences
plan publishing projects	plan (or help in planning) documents for projects: budgets, schedules, and resource documentation
	coordinate the production of multiple documents, often authored by several people, on one or more products
help in content development	help writers in developing material, setting up its logical order and structure
	identify gaps and ensure the inclusion of any additional or omitted content
	advise writers on the use of graphics, headings, and captions for figures and tables
	help writers to construct indexes and glossaries
edit content	perform rule-based and analysis-based editing
	review, edit, and rewrite all copy (including technical content) as necessary
	supervise graphic artists and editorial assistants
prepare for publication	resolve problems in files, including layout
	produce a final copy or the electronic equivalent
	coordinate with printers or website developers
	examine and approve page proofs or electronic equivalents

Editor roles	Editor tasks
coordinate quality assurance	organize SME review of material for technical accuracy
	test written procedures against the product (software or hardware)

Adapted from Hollis Weber n.d.

Regardless of the industry, technical editors are essential members of the team and can offer help at any stage of your project. Without an editor, a team lacks a “catcher”—a guiding presence who can offer advice throughout the project. This situation places more demands on management’s technical, teaching, and writing skills (Tarutz 1992, 44). Writers, at all stages and levels of your organization, benefit from a fresh set of eyes on their work because “few brains can simultaneously monitor conceptual progress and mechanical detail without lapses” (Fisher Saller 2016, 71). This is where technical editors come in. They can round out a star team, like the team in Figure 3, and help propel a winning product.

Figure 3: Star team celebrating a win



source: Pixabay 2016

Editor as villain

Some writers carry an image of an editor that fills them with fear (Fisher Saller 2016, 63; Tarutz 1992, 52). This editor is not a team player—they ruthlessly cut into carefully crafted text while imposing arbitrary and unexplained rules. Some editors may not feel the need to distinguish between changes they make to fulfil the requirements of the publishing organization (Henkin 2022) and changes that reflect their individual preferences. Editors, for the most part, are not villains eager to get their hands on your life’s work. Good technical

editors recognize that they are not infallible; they are open to learning and understand their role on the team. Familiar with working on teams, they see the benefit of collaboration. After all, they share your goals.

Editor as ally

As Carol Fisher Saller says in *The Subversive Copy Editor*: “to see the writer-editor relationship as inherently adversarial is to doom yourself to a career of angst and stress” (2016, 6). Good relationships between writers and editors are reciprocal and based on respect for one another’s roles. Good editing improves the clarity and accessibility of your writing. Removing errors is a necessary step to make your document the best it can be (Pearson 2024). Feedback from editors points to issues that need to be addressed so you can reach your audience with the message you intend. An editor is your ally. They want you to reach your audience. They will help you succeed.

“If you maintain frequent and open communications on schedules, deliverables, and expectations with all groups, you’ll avoid unnecessary rework, expense, and delay.” (Tarutz 1992, 342)

Collaborating: writer and editor dynamics

Healthy collaboration between technical writers and editors includes dialogue, negotiation, and even a robust exchange of views. Writers help editors by asking constructive questions, communicating about milestones and deadlines, and expressing appreciation for editor input (Fisher Saller 2016, 71).

At its best, technical editing is an iterative process. Ideally, a writing project includes time for multiple rounds of editing (Henkin 2023), including:

- early rounds of feedback, dealing with:
 - structural issues
 - substantive changes
- later rounds of feedback, concentrating on:
 - polishing prose
 - proofreading the final text

On each iteration, you can expect an editor to return content to you with questions for you to address, and then the editor will review and edit the changes.

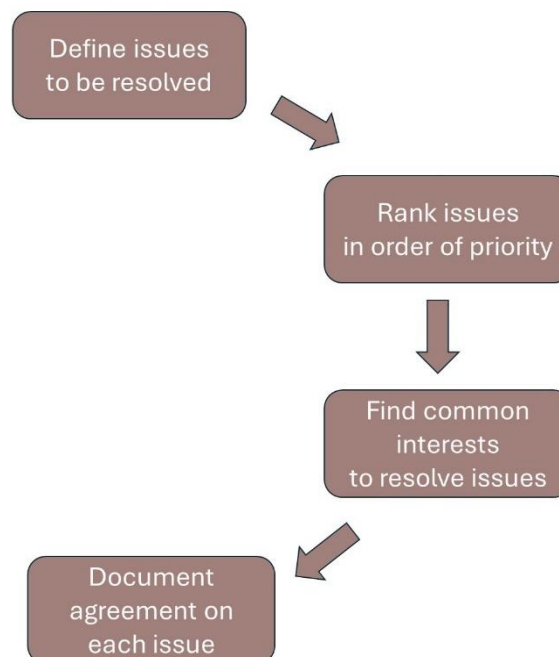
Throughout your project, a collaborative approach to the writer and editor dynamic works well to address any concerns that may arise. Issues beyond the scope of editing, like scheduling, budgeting, and expectations, are best addressed in open communication with your team. Do not be afraid to ask questions when you have them (Pearson 2024). Feel

empowered to share your thoughts when you disagree with a suggested change. Ask for clarification. Remember, the goal of both writer and editor is to produce the best possible final product.

Overcoming challenges

Challenges can arise in any project. External decisions can affect length, scope, and content needed in technical documentation (Fisher Saller 2016, 111). Unstated assumptions and misunderstandings undermine the effectiveness of work within a team. In these situations, communicate openly and consider using mediation techniques (Johnson-Sheehan 2024, 59), as shown in Figure 4.

Figure 4: Overcoming obstacles through mediation



source: Primeau 2024, adapted from Johnson-Sheehan 2024, 57

Communicating effectively

Open communication is the prerequisite to effective teamwork with a technical editor, but it can be difficult to achieve. When someone points out errors or suggests improvements to your work, it is easy to become defensive (Pearson 2024). But hostility creates an environment where neither party can feel heard, while an attitude of listening builds the basis for a conversation where both parties benefit. Honest communication between writer and editor encourages transparency, allowing the editor to express the reasons for their suggested changes (Fisher Saller 2016, 16) while supporting the author to find alternative solutions to improve clarity and ease of comprehension.

Establishing goals and expectations in transcultural communication

Anticipating the values and needs of global and transcultural readers is essential to modern communication networks. In fact, “diversity is a strength in the global workplace, and it is fine to recognize that people from other cultures think and behave differently from you” (2024, 33). Communicating in a global and transcultural way with your team members can be equally important. People from various cultures have their own ways of communicating, so their expectations for both the content and the process of technical communication will also differ. Set clear goals, discuss expectations, and establish a project’s purpose and desired outcomes. Open communication promotes understanding and collaboration across diverse cultural contexts. Clear goals can help bridge cultural differences and ensure that team members share a common vision, and a clear path to successful outcomes in transcultural environments.

Sharing and receiving feedback gracefully

A good editor is considerate, polite, and tactful when dealing with team members. They offer valuable insight and ruthless commentary. In response, good writers are tactful when responding to editors’ comments but do not meekly accept every suggestion: editors do make mistakes, too (Hollis Weber n.d.). Maintain an environment of mutual respect and an openness to learning. Feedback from all team members is invaluable and essential to the success of your project.

Conclusion

Reviewing and editing are core concepts and practices of technical communication. Working with technical editors is an important skillset that affects the quality of your published work. Now that you understand why you need an editor on your team and how to collaborate with them, you may have a greater appreciation of Judith A. Tarutz’s analogy that, like a catcher in baseball, an editor plays an inconspicuous but vital role in the success of the whole team (1992, 39-44).

Like any writer, you aim to communicate clearly and effectively to your intended audience about your products or ideas. As Richard Johnson-Sheehan points out in *Technical Communication Today*, “a well-edited, error-free document will help build your readers’ trust in your ideas and your company’s products and services” (2024, 10). Whether you are an SME, an experienced writer, or a reluctant writer, understanding your role as you engage with an editor is essential to technical communication.

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