How to maintain document integrity

Being able to identify exactly where changes to text have occurred and who suggested them.

How to maintain document integrity

Creating a document – whether it's a brochure, a report, a contract, your team handbook, guidelines or even website or packaging copy – is both a development process and a team effort.

It's a development process in that the idea you started out with is likely to evolve as the piece of work is refined. You may know at the outset that what you need is a series of marketing emails to let your customers know about a certain type of mortgage. But midway through the process, you may also have decided to include bridging loans in the email too.

It doesn't mean you got the brief wrong – it's just that by asking colleagues who are mortgage specialists to feed back, you become aware that bridging loans are a sensible thing to include in this communication too.

When your ideas change
Or you start off thinking that a fact table describes everything your reader needs to know… but then your copywriter suggests bringing some of the facts to life with mini case studies and you think, "Yes – fab, let's have that."

In other words, pretty much anything that starts as an idea has the potential to – and often does – morph and mutate as it becomes more fleshed out.

Then there's the collaboration aspect. In many organisations, creating collateral can involve 5, 10 or sometimes even 20+ individuals. These people can include subject matter experts, legal and compliance professionals, marketing specialists, copywriters, brand experts, senior decision makers, non-exec directors and all manner of other stakeholders.

Each of them will be tasked with feeding back as the document is shaped and polished.

And feedback comes in thick and fast
The challenge with all this development and feedback is that before you know it, scores of the same document can exist – all containing different views and maybe even radically different suggestions about how the text should evolve.

This situation is compounded with larger documents (say a 30,000 word policy) or suites of documents – where text is shared for review in sections. Which of course means that you can rapidly end up with scores of different versions of each section.

Things can become a mess pretty quickly. Rationalising all the comments can take forever – and if you're not entirely sure who said what and when they said it, the whole project can nosedive.

This is why it's important to safeguard the integrity of a document all the way through the creation and review process.

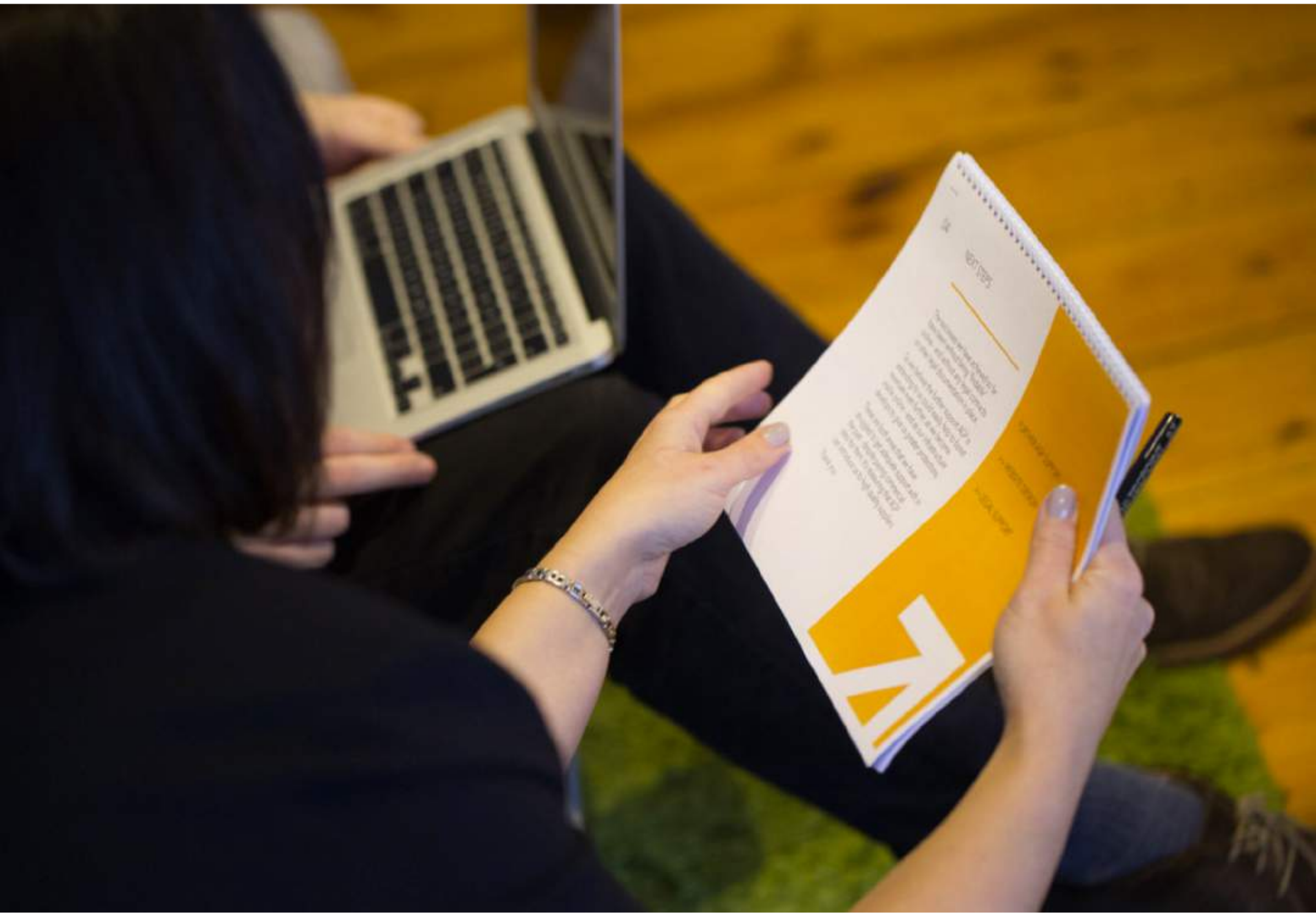
What does maintaining integrity mean?

When we're talking documents, the meaning we attach to "integrity" is the sense of keeping something whole and undivided.

With a commercial document, this means sticking to the spirit of the brief and using it as a constant point of reference.

Maintaining document integrity means that you control the evolution of your document through the development process so that it remains useful and impactful.

What follows are the steps you need to take throughout the development of your document.



WHAT YOU NEED TO DO

1. Establish ownership

For a document to remain whole and undivided (or at least for it to remain true to the brief), someone has to own it.

The owner of the document could be an individual – or it could be a team. It's not unusual for a marketer to own a brochure, for example. Or for a risk management team to own a set of policies.

The owner of a document should be the person or team that has the final say on everything relating to it – and that takes ultimate responsibility for it.

Without ownership, there's a higher likelihood of the document never being finished – of it circulating interminably while people add further and further comments until no-one can quite remember what it was ever for.

With ownership, a document tends to be stronger and more effective.

The ideal dynamic for document creation is benign dictatorship. Communications that are formed by committee, on the other hand, tend to be diluted, less effective and longer than necessary.

What about when different teams own different sections?
We've come across documents where different teams own different sections of a document. An annual report is a classic example of this. The finance team is responsible for the regulatory bit with all the figures in. Then the marketing, brand and corporate communications teams might carve the rest up into sections.

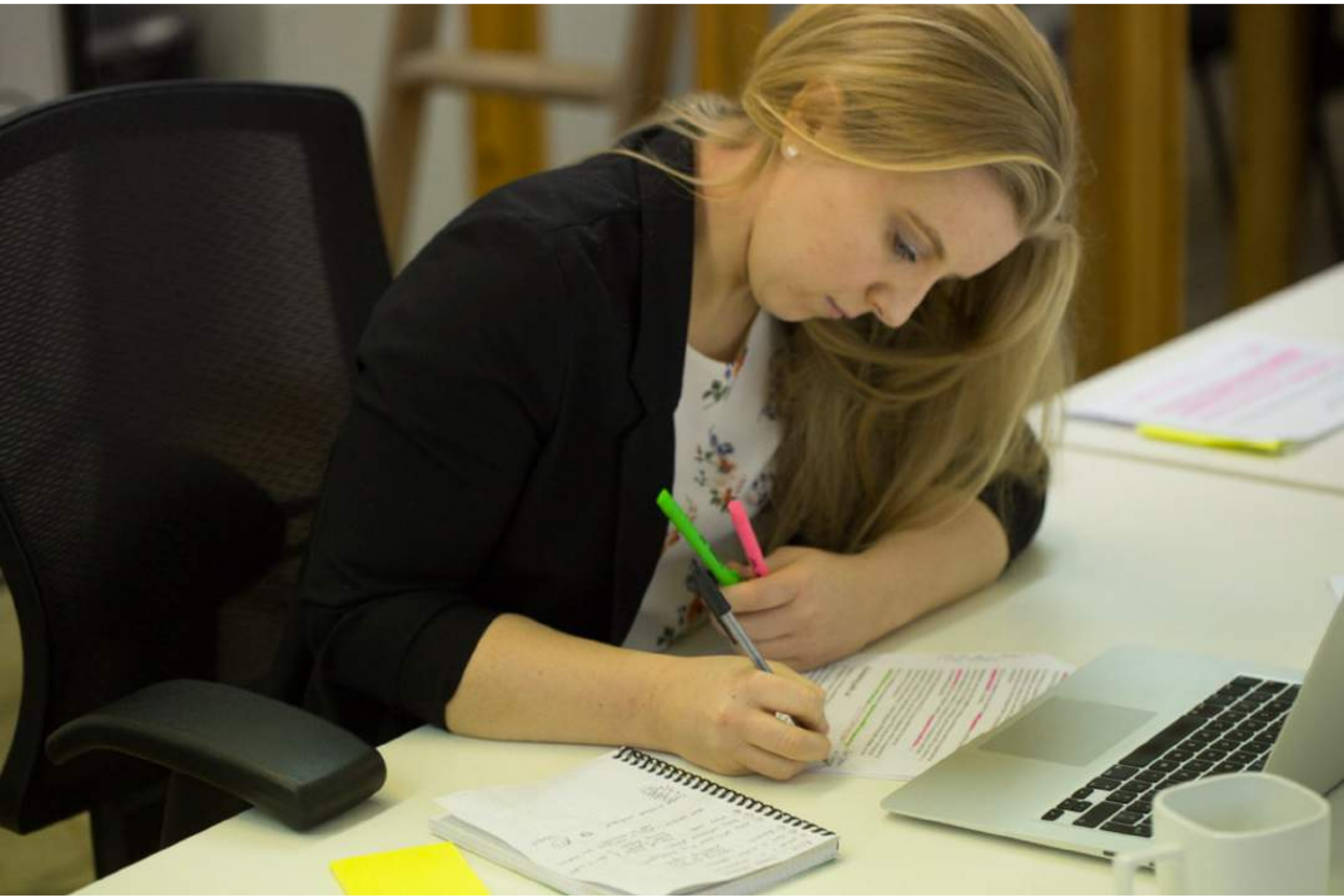
We'd still recommend having one overall owner of the document to make sure it flows, that teams aren't repeating one another or saying anything contradictory.

2. Establish protocols for version control

"Version control" is a neat little expression that wraps up an entire approach to making sure you can always lay your hands on:

- The most up-to-date version of a document
- Comments made by individuals throughout the process
- Where any errors may have crept in
- Who has written what

If you're working in a regulated industry, it may be legally necessary for you to be able to keep track of these things. Even if you're not, it's good for the document, your organisation and your sanity to make it easy to be able to do these things.



THE PROTOCOLS YOU'LL NEED

The protocols you'll need

For any process to go smoothly, it helps if everyone involved adopts standardised ways of working. For version control, you will need to:

Have a file naming convention
Make sure that everyone sending versions of a document back to you knows how to label it. Always make sure your file naming convention includes:

- The document name
- The sub-section of the document (on larger projects)
- The date
- The initials of the contributor
- The version number

So you will end up with file names that go something like:

ABC Project_Section 1_140819_LD_V1.doc

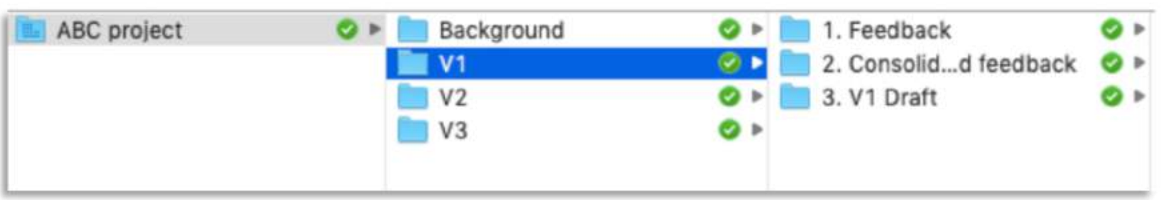
Yes, it's a long file name. But if you want to immediately see what LD commented in version one, it's going to make your life a heck of a lot easier than if you squirrel away random files called:

My thoughts.doc
ABC Project latest.doc
Emily ABC project.doc

The protocols you'll need, continued

File tidily with folders that make sense
Involving colleagues in rounds of reviews and amends generates a serious amount of paperwork. Do yourself a favour and file it so you can retrieve it easily.

This is the kind of system we use:



Your life is easier when you can lay your hands on information quickly. On the other hand, it can be all-out stress if you're searching through your last few months' email trying to locate a file someone perhaps sent you.

If your workplace uses Google Docs or any collaborative space for document development – great. Just make sure people use it consistently. Our experience of these kinds of spaces is that some use them and some don't… which creates issues when you want to consolidate feedback and keep a paper trail of who fed back what and when.

Adopt conventions for feeding back
Giving and managing feedback is an artform in itself. If you'd like to read our thoughts on it, please download our guidelines. At a bare minimum, make sure everyone is feeding back using the same mechanisms – for example, tracked changes or stickies.

If you have some people tracking changes, some people sending you a vague email saying: *"Are we sure about page two?"* And some dropping hand-written feedback on your desk, it's going to make life difficult for you.

Although tracked changes are far from perfect (especially when you have more than five people feeding into one document) – we think they're often the least bad option.

The protocols you'll need, continued

Mandate commenting protocols
Make sure that everyone involved in the process knows that if they want to comment – or even rewrite large sections themselves – their name needs to be on the change.

Managing document integrity is going to become impossible if someone takes it upon themselves to rewrite parts of a document, but doesn't highlight that they've done so.

It may take some time for you to realise they've done this. And it means that comments you receive from others may or may not be based on the original document you shared with them.

If you ever suspect this has happened, use online resources like diffchecker.com to find out if words, phrases or entire chunks of a document have been rewritten without your knowledge.

If they have, you may have to halt the process, revert to a previous version and re-circulate for comment and review.

Make the consequences of deviation clear
Poorly managed version control almost always results in delays and additional cost – not to mention frustration and loss of goodwill.

In regulated environments, it could – at the extreme – result in fines and damage to reputation.

Get organised, set expectations, enjoy

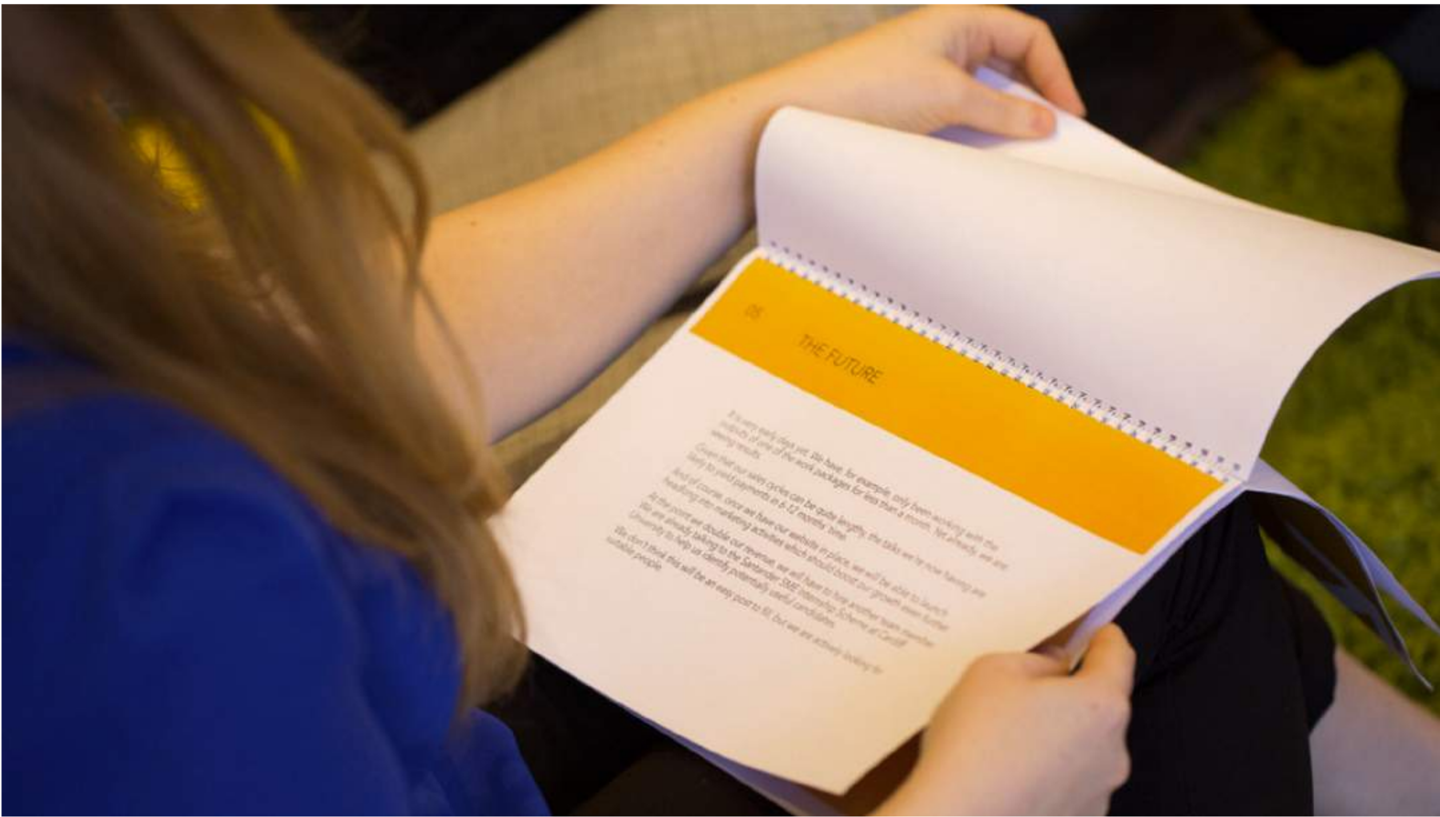
It often surprises people who are new to document creation just how much project management and organisation is involved in keeping the process as productive as possible.

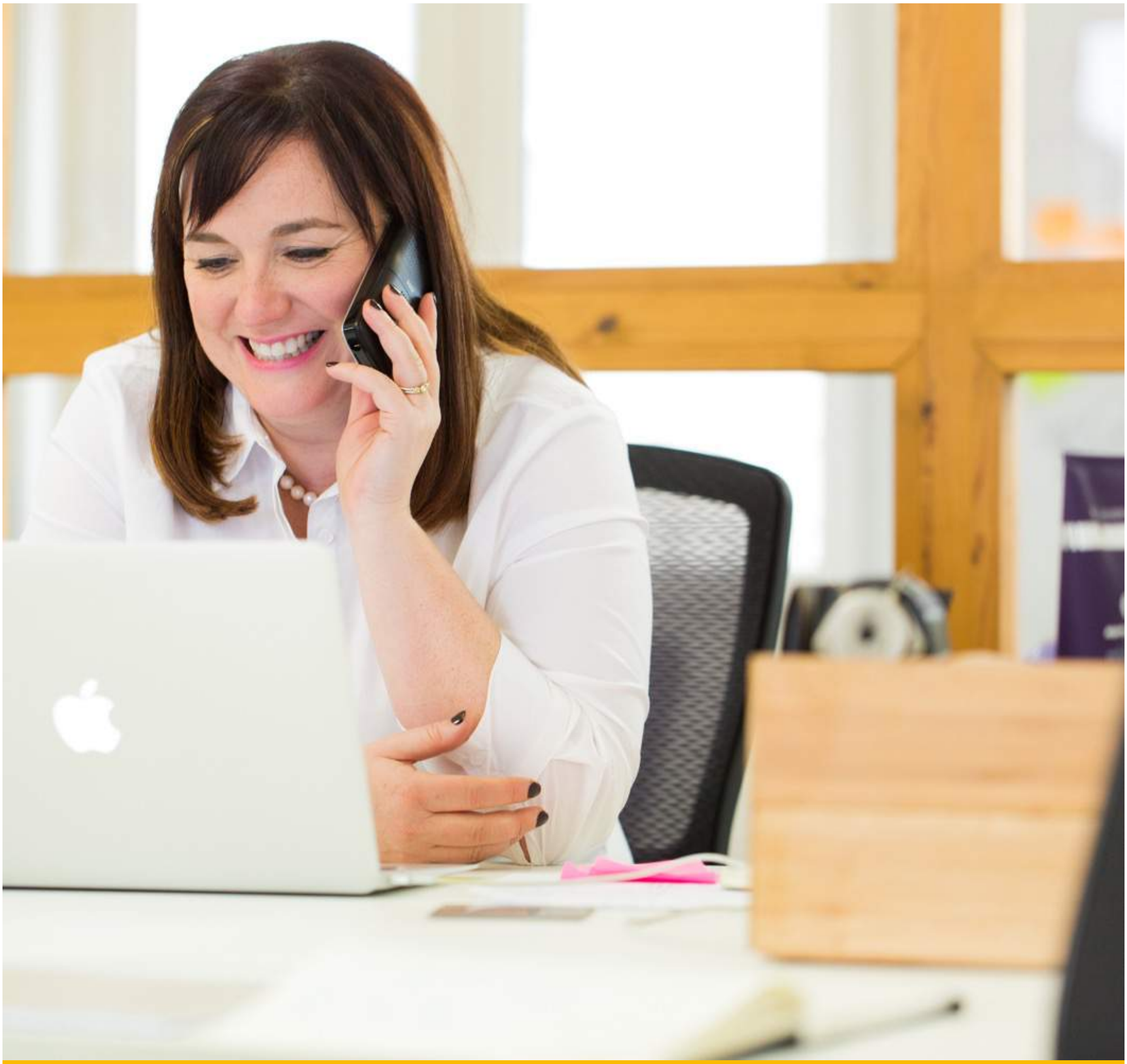
There's sometimes even greater surprise at the levels of emotion involved in it too. *Why didn't so-and-so implement my feedback? Oh my God, how much more of my time must I spend doing this? I regularly wrote 5,000 word essays for my MBA and I managed to do it in one weekend – why is this taking so long?*

Creating – or overhauling – a document for your organisation is going to take time. It'll take time because you're involving people and you're asking them to think and share their views and knowledge.

So be sure everyone knows what's expected of them. Get everyone around a table to kick the project off and set the rules – and enjoy. Because there's huge satisfaction when a project like this comes together and everyone feels proud to have been involved.

And as ever, if you'd like our help or just want to bounce a few ideas around, give us a call.





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