Ten tips to get the most from outsourced editorial project management/full-service suppliers

By Julie Willis, Editorial and Pre-Press Director, River Editorial (a division of Westchester Publishing Services UK Ltd).

1. **Create a relationship with a reputable and trusted supplier ahead of anticipated peaks in in-house production work.**

   The temptation to work in fire-fighting mode instead of forward-planning mode is one we are all familiar with. A quieter period is the time to identify a potential supplier and send them a trial project (most suppliers will be willing to do this at an agreed price). You will then be able to spend time reviewing the workflow, processes, files and proofs, and provide valuable feedback to improve the standard of work produced. Time spent now will give you the assurance to outsource titles in their entirety during your busier times, such as year-end.

2. **Ensure you have an up-to-date library of design templates, type specifications and style guides.**

   This is related to point 1 above. You should be able to build a library of design templates and type specifications. For the former ensure that your typesetter always provides you with the application files at the end of a project. There should not be an additional charge for this. For the latter it is ideal if you can write type specification documents. Style copies (a PDF using the specified type specifications) are also a useful tool for both the typesetter and the copyeditor. And your house style is an important part of this library. If you can provide these as part of a start-up package to the supplier then you can just specify the template and type specifications in your handover. The project manager will use these documents to quality check the copyedited files and the proofs, as well as providing this information to key stakeholders.

3. **Define your workflow(s).**

   Good project managers and full-service suppliers will be able to flex to your workflows. For example, if your workflow specifies that the author sees the first proof before it goes to the proofreader, define that clearly. If you always perform simultaneous author and professional proofreads ensure that this information is specified. If you have a diagram of your workflow, even better! You can check the supplier's understanding of your workflow when they send you the schedules they have created for the projects. As a side note, always insist that you are provided with a copy of the project schedule after handover.

4. **Provide complete content, including artwork.**

   Aim to ensure you have all content in place before handing a project over to a supplier. The worst offenders are missing artworks; it takes time to identify if artwork is missing or is incorrect. If artwork is swapped out, inserted or cut at proof stage this may impact the pagination and the index, and may even necessitate re-setting the proofs. Best practice is to ensure everything is in place, and, as a safety net, ask your supplier to provide a PDF of the existing artwork ahead of setting the proofs. The project manager will check this and flag to you any low-resolution images and together you should be able to identify problems early on.

5. **Write clear handovers.**

    Your handover should be clear and concise, detailing ISBNs, design template, type specifications, format, author details, series details, artwork, notes to the typesetter, notes to the copyeditor, notes to the project manager, word count, extent, final deliverables deadline and publication date.

6. **Set KPIs.**

    Key performance indicators (KPIs) are useful ways of evaluating your supplier's performance. Examples include 'contact publisher with schedule within one week of handover' and a measure of deadlines met or missed. These can be tracked by the supplier.

7. **Allow the supplier to handle author liaison and author queries (AQs).**

    Publishers worry about allowing project managers and/or copyeditors to liaise directly with authors. It may be tempting to continue to traffic author queries and other correspondence yourself, rather than allowing a supplier to do so. But if, at the start of the project, you send a clear introduction email out to the author(s), copying in the project manager, you should then be able to withdraw and focus on your other priorities. You can ask to be copied in to key emails, but the point of outsourcing is to free up your time of course. If you have done your research well and chosen a supplier you trust, best practice is to allow them to handle all author liaison.

8. **Define your touchpoints and try to stick to them.**

    Most of River Editorial's clients ask to see first proofs and final revised proofs. Some like to see a copyedit sample and a typeset sample too. Whatever your touchpoints are, ensure that you define them as part of your workflow and, for the sake of your efficiency, don't be tempted to check more than is absolutely necessary.

9. **Request a regular production report.**

    This need not contain vast amounts of data – in fact the reverse is far more effective. You want to see the key stage of each of your projects, if they are on time, and any necessary qualifying information. If you use a management information system (MIS) ask if the supplier can provide live feeds via an application programme interface (API).

10. **Assign a member of staff as an account manager and channel all feedback through them via a regular phone call or video meeting.**

    This creates an efficient way of collating and providing feedback and checking that the supplier has understood the points being raised. Build in less frequent higher-level reviews, looking at KPI data such as adherence to deadlines and budgets, and feedback from authors and in-house staff. This shouldn't take more than an hour and forms a valuable part of your quality control/assurance process. Project managers and full-service suppliers will be keen to engage with this and value the opportunity to work with you in a continuous improvement (CI) loop.