



EEI COMMUNICATIONS®

The Publishing Think Tank

How to Produce Winning Publications

On time and on budget

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Congratulations!

You've just been assigned another publications project—and another tight deadline. Do you ever wonder if you're putting out the best publications you can, or if there might be a way to do a better job more efficiently and economically? If so, EEI Communications has created this guide for you.

We've been in the business of finding the best way to create and produce publications for more than 30 years, and in this booklet we'll share with you some of our best tips for producing more effective publications.

The Foundation of Success

Though every publication is unique in some ways, the smart thing to do is to find the common ground among your projects, rather than focusing on the differences. From there you can build a framework that controls the overall process and workflow, as well as the everyday procedures of getting from one task to another. In this context, it becomes easier to effectively and efficiently meet the challenges of any project that comes your way.

For instance, there are certain steps in the publications production cycle, and ideally they are performed in a certain order. (The first stage of any publications project is writing the text and seeing that it is reviewed and approved; production shouldn't start until the text is finalized.) Each step has a beginning and an end, and each drives the process forward and builds on what came before. Doing the right thing at the right time—

and keeping your bearings along the way—is the key to a smooth and successful publications project. Let's unravel the phases one by one and see how they're accomplished and how they fit together.

Design

Design for any publication should be based on a complete understanding of the audience, goals, and budget for the project. A kickoff meeting should be held to give everyone involved a chance to provide input. The time spent on such a meeting can save many false starts on the design.

Cover design usually follows a separate track from text design, because its overall production cycle is less complex. You (or your designer) will need to produce some sort of *comp*—a full-color proof that accurately shows color, typography, and other graphic elements—so that the powers that be can review and approve the design before the final cover is prepared for printing.

Text design, on the other hand, is approached by producing sample pages (or "spreads") that include all the various text and graphic treatments that will be called for in the

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manuscript. Once the sample spreads are reviewed and approved, they serve as a guide for the layout of the complete, final publication.

Copyediting

Copyediting is indispensable for just about any publication you can imagine; the process polishes the manuscript for production. Think of it as sifting through the raw material of a publication to uncover any flaws that will hamper construction of the final product. At this point, all issues of content and organization have been resolved; the goal of the copyedit is to find and correct grammatical errors, style inconsistencies, and omissions that can undermine the reader's involvement with and understanding of the text.

File preparation

Once the edited, polished text has received final approval, the electronic files can be prepared for layout. At this point, the objective is to clear away the unnecessary debris that accumulates in a text file through the writing and editing stages of the process, which will make the layout go more smoothly. It may seem unimportant, but this step can save hours and untold frustration during layout and proofreading. The search-and-replace function can be used to easily strip out unnecessary characters and formatting like excess spaces, paragraph returns, and tabs.

If an electronic stylesheet has been used correctly and consistently, the styles can usually be carried over from word-processing software into layout software with no problems (assuming, of course, that the style names are

used consistently). If formatting has been manually applied, however, it's best to strip it out at this point, because it will likely conflict with the styling instructions in the layout software.

Page layout

Smooth page layout depends on clean text files and a well-constructed template and electronic stylesheet. These should be constructed from the approved text design samples to make sure that all the details are addressed.

As much layout information as possible should be built into the stylesheet—not only fonts, sizes, and alignment, but also formatting information like line spacing, spacing above and below paragraphs and heads, indents and insets, and bullets and numbering.

At the time the pages are being laid out, the files for any photos, graphics, or other illustrations (or at least a list that gives their reproduction sizes) should be available so that all elements can be included in the page layouts.

Proofreading

Proofreading is probably the most important publications quality assurance mechanism available; strangely, it is often overlooked until very late in the process. Not only is it a way to find deviations from specifications or instructions throughout the process, but it is also a valuable “backstop” to the editing process: a proofreader may find minor style variations or discrepancies that were missed by the copyeditor.

The entire document should be proofread word for word after it's been laid out for the first time. This may seem like overkill, but there are so many ways that problems can be introduced during layout that a fine-tooth comb is really necessary to find them. The pages should be proofread against the final, edited iteration of the document and also against the approved style samples—so that not only content but also formatting can be checked at this stage.

Every change or correction should be proofread. That means that after the errors found in the first proofreading have been corrected, someone must go back and check that the changes were properly made. No one should ever make a change to a file without having someone else verify that it was made correctly and that other errors weren't introduced.

Quality control

Before a finished publication goes on to be printed or copied, there must be time for a final quality control (QC) review. This review should be done by the most ruthless nitpicker on the staff.

The objective at this point is to have a “fresh eye” look over the entire piece in order to find any problems that might get in the way of the reader being able to use, appreciate, or enjoy the finished product. Ideally the QC review is done by someone who hasn't been involved with the project up until this time and who can therefore approach the publication as a reader would—with no preconceived notions about why things might appear the way they do and no knowledge of the various crises that have occurred during the publications process (that kind of sympathy can cause one to overlook flaws).

And, of course, there must also be enough time in the schedule to correct the problems unearthed during QC!

Now, on to the fun stuff!

With an understanding of the basic process, you're ready to tackle the next publications project that comes your way. The following pages provide some tested pointers from the experts that will help make that project a success.

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Planning and Scheduling

A plan and a schedule are important for “normal” projects with reasonable deadlines; they are an absolute necessity for the panic job with an impossible turnaround.

When faced with a crunch project, it’s tempting to just jump right in and get rolling because of the time pressure. But the hour or two you spend launching a publication the right way will be repaid several times over with a quality project that stays on track.

Don’t throw the schedule out the window when the project gets sticky; know where you are and where you’re going at all times.

As deadlines start to slip, it’s a natural impulse to just shrug and keep slogging on, without reassessing the overall project. If an interim deadline is missed, go back and reschedule the rest of the job based on where you are today. The purpose of

those interim deadlines is to give you a chance to assess your progress and still meet your final deadline after the unexpected happens.

Your project plan and schedule are not works for the ages; if one path doesn’t work, another one will.

If you get too invested in only one way of getting projects done, you won’t have the flexibility you need to react when you’re thrown a curve (and you always will be). Unexpected contingencies are the name of the game; you should always have at least a Plan B and a Plan C in the back of your mind, just in case Plan A goes south.

Always include points of review and approval—and the dates they are to be completed—in your project plan and schedule.

A surprising number of projects are derailed simply because their schedules included only the tasks involved in actually producing the publications; but reviews and approvals (by your boss, the CEO, the board of directors, or whoever) are as important as layout and proofreading when it comes to getting your publication printed and out the door. Find out in advance who has to approve what and when they will be available, and build your schedule accordingly.

Before you schedule, assess each task in terms of the number of hours of work it will take to complete, rather than estimating the number of days it will take to complete.

The point here is not to be accurate to the minute on how long tasks will take, but to have a good handle on the real

Rules of thumb for estimating publications tasks

NOTE: dsp = double-spaced page, or 250 words

Copyediting: 5–6 dsp/hour

Book layout: 7–15 dsp/hour

Newsletter layout: 1–2 dsp/hour

Proofreading: 10 dsp/hour

Quality control review: 25 finished pages/hour

Planning checklist of publications tasks

- ✓ Outline
- ✓ Write
- ✓ Review and approve text
- ✓ Revise text
- ✓ Review and approve revisions
- ✓ Design cover and text pages
- ✓ Copyedit text
- ✓ Prepare files for layout
- ✓ Format
- ✓ Proofread
- ✓ Make corrections
- ✓ Proofread corrections
- ✓ Review and approve final pages
- ✓ Revise final pages
- ✓ Proofread revisions
- ✓ Perform final quality control check
- ✓ Make corrections
- ✓ Proofread quality control corrections
- ✓ Print/copy
- ✓ Distribute

amount of work to be done. Quantifying work by a standard 60-minute hour rather than a variable “day” makes it easier to manage and schedule and gives you a tool to measure how you’re doing as the project moves along.

To save time in your schedule, look for tasks that can be done at the same time, or steps that can overlap.

For example, one good option on a book project is to have design and copyediting going on at the same time, particularly because these are two time-consuming tasks.

And there’s usually no reason to wait for all the chapters of a book to be laid out before starting to proofread. As long as there are natural points where you can divide the work, it’s a good idea to overlap steps like this to save time.

Another way to compress a schedule is to work in shifts. This allows more work to be accomplished on a given day but limits the number of hours required of individual workers.

For example, layout work can be done from 9 to 5, then proofreading can be done from 1 to 9. Or if more desktop publishing staff than equipment is available, scheduling a second shift can get more hours of productivity out of the equipment.

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Design and Layout

When planning the typography for your publication, start with a list of every head level and text element, so that you can be sure to include everything in your design plan.

Once you have the scope of necessary type treatments in front of you, it's easier to assess what typestyles you'll need to use. If you're not experienced in using type, remember that simple is fine; look for typestyles that offer you a wide range of variations (bold, heavy, italic, condensed), so you have options without having to mix too many styles.

Type size and line length are interrelated and must work together for good readability. Design your text columns so that you're getting between 35 and 50 characters on each line.

In everything but very short pieces of text (captions, pull quotes, etc.), avoid lines shorter than 30 characters or longer than 70 characters.

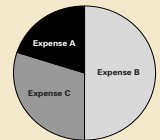
Don't be afraid of white space; it gives structure to your pages. Ample margins are not just empty—they draw the eye to the text and make it easier to read.

The space between columns (the *alley* or *gutter*) should be wide enough that the eye doesn't wander straight across the page, but not so wide that the columns look disconnected from each other.

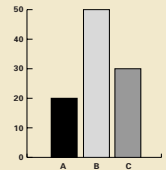
Once you've established a framework for your pages, stick with it. Be sure, especially, that every column of text starts at exactly the same distance from the top edge of the page.

Use the right type of chart to illustrate your point.

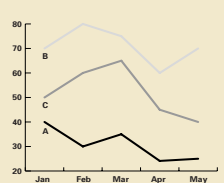
Pie charts show the relative sizes of the parts that make up a whole. For instance, a pie chart would be a good way to illustrate the proportion of different expense categories to total expenditures.



Bar charts compare quantities. If you needed to compare three different expense categories to *each other*, a bar chart would be the way to go.



Line graphs (also called **fever charts**) show changes over time. A line graph could be used to track the increases and decreases in each expense category from month to month.



In setting up your document stylesheet, the objective is to eliminate as much manual tweaking as possible and make the software do the work for you.

Anything you have to do manually will take extra time and may be done inconsistently. Build into the stylesheet layout rules such as a headline always staying with the text that follows, a particular head level always starting on a new right-hand page, how many lines constitute a widow, and how many consecutive lines may end with a hyphen.

Establish style-naming conventions from one publication to another.

If you always call the first-level head “Head A” (rather than sometimes “A Head” and sometimes “Head 1”), you’ll be able to easily share stylesheets between documents; consistency also makes it easier for one person to pick up on another’s work and for work to be divided among several people.



**For professional results,
pay attention to the details.**

Set off paragraphs with *either* an indent *or* added space above—not both.

Heads and subheads should be clearly connected to the text that follows; add more space above than below.

Don’t use underscores in text—convert to italics.

Convert double dashes (--) to em dashes (—).

Don’t use two spaces after punctuation at the end of a sentence.

Always use typographical (“curly”) quotes and apostrophes.

Use widow and orphan controls so that single lines aren’t stranded at the top or bottom of columns.

Avoid ending more than two lines in a row with hyphens.

Proofreading and Quality Control

Even if your text has been checked throughout the process, make time for a careful, word-for-word proofreading pass after the pages are laid out.

This step is a valuable safeguard that is often overlooked. A careful proofreading at this point can catch errors that were overlooked during writing and those that may have been introduced during layout.

The final phase of your error-prevention program should be a quality control review by someone who hasn't been involved in the project at all throughout the publications process.

The quality control (QC) review is done *in addition to*, not instead of, proofreading steps throughout the publications process. Whenever you think it's perfect, think again.

Because QC is done at the very end of the project, it's often done in a rush. Make sure you set aside extra time at the end of your schedule to accommodate QC—and make sure you allow time to correct the problems uncovered and a bit of time to check the corrections.

When your final product is an electronic file, also plan for a review to make sure that the files are constructed properly.

Take the final electronic files to a workstation other than the one where they were created to make sure that they open properly and that the correct versions of all the linked files can be found.

Don't trust your spell-checker.

The spell-check feature is an important tool, but it's not a foolproof error detector because it can't understand context. Use the spell-checker before proofreading to clear out all the obvious errors; that will make it easier to see the other errors that are surely there.

Hiding places for errors

Proper names

Introductory material

Points of agreement (Does the table of contents match the text? Does the text accurately reflect what's illustrated in the graph?)

Headlines

Text in boldface or all capitals

Tables and figures

Lists

Where there are other errors

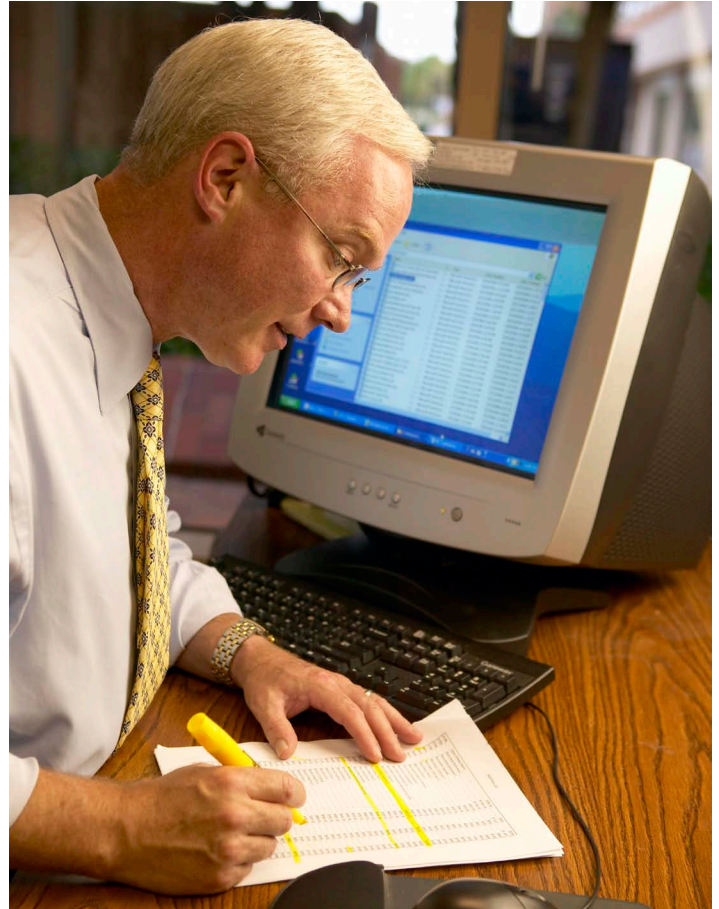
Whatever you're absolutely sure is right

“We were in a hurry” is not a good excuse for mistakes.

Don't cut corners when there's a frantic rush to get the project done. Everyone will be calmed down by the time the document is printed and distributed, and when they see a typo they'll forget that they told you to skip that last proofreading step to get the project out the door. Remember the old saying: "There's never enough time to do it right, but there's always time to do it over."

QC checklist

- ✓ Table of contents and indexes
- ✓ Heads and subheads
- ✓ Headers, footers, page order, and position of page numbers
- ✓ Column and page breaks
- ✓ End-of-line hyphenation
- ✓ Sizing and position of photos and graphics



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Nuts and Bolts

Organize materials at the start of the project, to ensure that everything is in one place and easily accessible.

Double-check that the hard copy matches what's in the electronic file, for example, and that all the figures and tables mentioned in the text are actually provided.

Standardize processes and procedures, and remember that the most intricate system is the least reliable.

The less time spent asking what happens next, the more quickly a job gets done. And the less guesswork there is about how to do a task, the more likely it is to get done correctly.

Take the time to learn all the features of your software tools. An investment in training beyond the basics will be returned in quality, consistency, and efficiency.

First of all, use styles and master pages consistently. Styles should include not only font specification but spacing, indents, bullets, and other formatting instructions. Anything that you'd have to build manually more than once in your document should be committed to a style or a master page element.

Be sure to also exploit features like automatic numbering, footnotes, and generated lists and tables of contents. Because the software is doing the work automatically, you save time up front and in revision.

Use standard checklists to keep yourself from forgetting routine steps and details and to give instructions to anyone else who might be working on the project.

For example, a checklist for copyediting could include the editorial style to be followed, whether bibliographies and references need to be verified, and how acronyms and abbreviations should be treated. This checklist will also help the proofreader later in the process.

Concentrate on reducing the number of times you review and revise your document.

Going back and picking up those little afterthought revisions can eat up a surprising amount of time in your schedule—and remember that every iteration is a chance to introduce new errors!

An established work plan with scheduled review and approval points is the best way to control last-minute tinkering. Make sure you define roles for your reviewers so they know what they should be focusing on while they are reviewing (for example, let them know that they should be concerned only with content and that someone else will fix typos and grammatical errors). Let them know, too, when (or if) they will be seeing the project again at a later stage.

Keep everyone working from the same version.

Make sure that reviewers see only the current version of the document, and that the old electronic versions are either destroyed or archived under different file names than the current, "live" version.

So, are you ready to be a publisher?

Today, more and more people in widely different types of businesses are finding that, in addition to everything else they do, they're expected to be *publishers* as well. And they're putting out a bigger variety and volume of print and electronic publications every day.

Though there are tips and tricks you can learn to make that part of your job easier, some projects require the special genius of a talented graphic designer and a

professional writer, or the highly developed skills of an experienced editor and publications project manager. Or you may need specialized training to get your publications to the next level.

It's important to know when seeking out professional support is the right call. We'd like to share with you the experiences of a few of our clients who found that EEI Communications was the partner they needed to tackle that impossible job.

A government agency had recently adopted new software standards but hadn't yet mastered the program sufficiently to meet the deadline for an update of its major technical reference. EEI Communications developed style templates in the new software that improved the presentation of the information and provided training in the use of templates to the agency's publications staff.

A high-profile national commission needed to quickly produce edited transcripts of its monthly meetings. An EEI editor

attended the meetings, and a team of EEI transcribers worked under the editor's supervision to produce a complete edited transcript of the proceedings in time for the consensus meeting.

A medical journal, which was produced in-house by a professional society, wanted a new look that would help it maintain its stature in a competitive market. An EEI designer led a brainstorming session with the group in their office to update the text design and also developed new cover design alternatives.

An IT firm needed sales materials that clearly conveyed the strategic advantages of its product. EEI Communications created an illustration that communicated the major selling points so effectively that the company adopted it for use on its Web site as well.

A public relations firm was concerned about errors, so they set up a system of sending PDF files by e-mail to EEI Communications for a final review. EEI's evening crew received pages at 5 p.m. and returned them before the client's office opened in the morning.

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Complete publications services under one roof

EEL Communications is unparalleled in the scope of publications services it offers and in the depth of its professional talent. We have the resources to solve your publications problems, taking on that impossible project from beginning to end or simply providing support in one or two phases along the way—always on time and on budget. All EEL publications professionals are rigorously screened and tested; we accept fewer than 7 percent of the individuals who apply. As a result, we can guarantee our workers and our work.

And while you reap the benefits of working with an unmatched team of specialists, you'll work with EEL through one point of contact: an experienced project manager familiar with your needs and skilled in guiding projects to successful completion.

EEL Writing Services offers talented writers in your field to help you address the needs of your audience. We have screened and evaluated hundreds of writers by industry and by type of project. The best writers work for us and are available to create your advertising, annual reports, educational tools, newsletters, special reports, technical documentation, user guides—whatever the project, we can help you create a clear and effective message that will speak to your audience.

EEL Editorial Services can ensure that your publications are clear, concise, and error-free. We can work with you to determine your editorial needs—whether it's a copyedit for grammar, style, and consistency or an in-depth, substantive edit for organization and clarity. Our proofreaders and quality control specialists can help you maintain quality and accuracy throughout the publications process. And EEL is one of the

few firms around that can offer professional conceptual indexing—we index *ideas*, not just words, to provide your publication with a truly useful index that enhances its value.

EEL Design Services can provide you with professional creative direction, design, illustration, and photography focused on your needs and objectives. We can lend our creative edge to your annual reports, sales collateral materials, corporate identity, magazines, newsletters, journals, books, and print advertising. And with complete, integrated production and quality control services under one roof, EEL can promise you not only a creative solution, but a finished product that meets your expectations for quality, schedule, and budget.

EEL Production Services has more than a decade's experience in providing full-service publications support. We were pioneers in desktop publishing, and our production professionals work in every major publishing software package (and many minor ones)—on both Mac and Windows platforms. We can offer the entire production process under one roof. And with day-and-night scheduling, we can give you the turnaround times you need.

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Professional advice to get your own operation on track

When you've been solving publications problems for more than 30 years, you get to know what works!

EI Consulting Services can analyze your publications department and make recommendations for improving performance. We can conduct a top-to-bottom evaluation to make sure that your systems and processes are efficient and effective, and that your operation is staffed appropriately. We can provide you with an assessment of your productivity and the quality of your publications, and give you a blueprint for improvement.

EI Press publishes an essential collection of publications reference books, as well as the highly respected, award-winning monthly newsletter *The Editorial Eye*. We go beyond theory to offer you tested, practical expertise in writing, editing, production, and publications management. And our Eye Exam critique service will give you concrete suggestions on improving your publication—from writing style and tone to graphic design.

A complete gamut of communications solutions

Staffing

EI's staffing services provide temporary, temp-to-hire, and direct hire placement of publications professionals. Our

high standards save you time and money, and our rigorous screening process identifies the right staffing solution for you.

Training

Everything you learn in our professional seminars is based on our practical workplace experience. We're obsessive about keeping up with the most advanced design, production, and Web software. And our instructors are industry leaders who teach what they do.

New Media

EI creates Web sites and multimedia products that target your audience and their 21st-century expectations. From concept development and scripting to audio/video editing and production, we bring together the technical expertise and artistic vision your project requires.

We'd like to become a part of your publications team

We hope that the advice in this booklet will be helpful to you as you tackle your next publications project. These pages, though, contain just a fraction of the publications expertise you can find at EI Communications—and the next time, you just might not have the time, the staff, or the experience a crucial project demands. Call us at 703-683-0683 or send us an e-mail at info@eecom.com for a free estimate. We will make you look good.

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