

Transcript from the Freelance Friday #EFAChat, June 27, 2014

Topic: Time Management for Editors

Guest: John Pettigrew, founder of Collate It

[@EFAFreelancers](#)

Welcome to the @EFAFreelancers monthly Freelance Friday! Use #EFAchat to be included in today's conversation.

[@EFAFreelancers](#)

This #EFAChat is being moderated by @wordfey.

[@EFAFreelancers](#)

Today, we are interviewing John Pettigrew, @JohnP_CollateIt, of Cambridge Publishing Solutions. #EFAchat

[@EFAFreelancers](#)

This #EFAChat will begin with an interview, followed by an open question and answer session.

[@EFAFreelancers](#)

Please save your questions until the Q&A session starts. #EFAchat

[@EFAFreelancers](#)

Thanks for joining us today, @JohnP_CollateIt. Could you begin this session by explaining what you do? #EFAchat

[@JohnP_CollateIt](#)

@EFAFreelancers Sure. Having been an editor since the 90s, I'm now running a startup trying to solve some problems I experienced. #EFAchat

[@JohnP_CollateIt](#)

#EFAchat Our first product is a platform for managing book proofs on screen - markup that actually works plus real-time collaboration etc.

[@JohnP_CollateIt](#)

#EFAchat So, basically, I'm trying to make editors' lives better by giving them tools designed for the jobs they actually do.

[@EFAFreelancers](#)

To @JohnP_CollateIt: Can you relate a specific moment as an editor when you realized you needed time-related help? #EFAchat

@JohnP_Collatelt

@EFAFreelancers #EFAchat Heh - too many to mention! But one's when I realised someone on our team was working 8am-9pm all week.

@JohnP_Collatelt

#EFAchat The problem was trying to deal with a book placed at an overseas typesetter who simply couldn't handle the complexity.

@JohnP_Collatelt

#EFAchat Personally, I found the hardest thing as a freelancer was saying No to jobs when I knew I didn't have time.

@JohnP_Collatelt

#EFAchat And dealing with that did, on occasion, lead to working exactly to the brief rather than doing the job I wanted.

@EFAFreelancers

What are the most common time management problems you've seen in editors? #EFAchat @JohnP_Collatelt

@JohnP_Collatelt

@EFAFreelancers #EFAchat Editors are a diverse lot! Besetting sin of freelancers is saying Yes when should say No (as I said, I felt this)

@JohnP_Collatelt

#EFAchat Which means the in-house editor doesn't get the job they want done. (The in-house editor wants not to need to worry about it.)

@JohnP_Collatelt

#EFAchat For in-house editors, it's probably similar - not being able to persuade management that work really will take as long as they say!

@JohnP_Collatelt

#EFAchat Generally, we're too willing to put the effort in to do something right, I think.

@EFAFreelancers

What's the first thing you usually suggest to editors or businesses approaching you for help? #EFAchat @JohnP_Collatelt

@JohnP_Collatelt

@EFAFreelancers #EFAchat "Tell me about it." First, you need to listen, then understand, then empathise. Only then think about solutions.

@JohnP_Collatelt

@EFAFreelancers #EFAchat Problems and contexts are so diverse that there really are no universal answers....

@JohnP_Collatelt

#EFAchat But clarity with your team (client, supplier, colleagues, authors etc.) is usually a casualty when things go wrong.

@JohnP_Collatelt

#EFAchat So, I find, getting clarity about the problem and (especially) the context often go a long way to suggesting the solution.

@EFAFreelancers

Define workflow. How does attention to workflow help a freelance business? #EFAchat

@JohnP_Collatelt

@JohnP_Collatelt

@EFAFreelancers #EFAchat That's a big one! At the basic level, 'workflow' is just the list of steps you go through to deliver your work.

@JohnP_Collatelt

#EFAchat But the key is understanding not just the steps but the relationships between them. Who does what, what depends on what prior step?

@JohnP_Collatelt

#EFAchat So developing a workflow is always unique to the team involved, even though they usually share common features.

@JohnP_Collatelt

#EFAchat And, in particular, realising that what works in one team may not work in another without some adaptation.

@JohnP_Collatelt

#EFAchat We often think of workflow, therefore, as an enterprise thing - just for big businesses. But freelancers have workflows.

@JohnP_Collatelt

#EFAchat Each client might have a different one - the formats and delivery channels they use, the house styles, the standards.

@JohnP_Collatelt

#EFAchat The in-house editor wants less stress when they outsource. So understanding how their workflow interacts with yours is key.

@JohnP_Collatelt

#EFAchat Which is all thus to say that knowing your workflow clearly will help you keep your clients happy - and so get you more work.

@EFAFreelancers

An editor has overcommitment on many small projects. How would you approach time management in that case? #EFAchat @JohnP_Collatelt

@JohnP_Collatelt

@EFAFreelancers #EFAchat The goal of time management is, of course, to avoid getting into this situation! But reality bites & stuff happens.

@JohnP_Collatelt

#EFAchat So, first step is to understand how deep you're in it. Estimate how long it will all take, and check all the deadlines.

@JohnP_Collatelt

#EFAchat Then I'd chart it - put the work into an order and work out how many deadlines are at risk, and by how much.

@JohnP_Collatelt

#EFAchat The real key, professionally, is never to lie to the client. So, as soon as you know there's an issue, get in touch and warn them.

@JohnP_Collatelt

#EFAchat Try to give them a realistic new estimate, and stick to it. Try to annoy as few clients as possible, of course!

@JohnP_Collatelt

#EFAchat There's always working evenings & weekends, too, of course, but that's not always practical - work long hours & the quality drops.

@JohnP_Collatelt

#EFAchat Sometimes, you have to admit you can't deliver some jobs. Do this early and the client won't hate you forever. Leave it too late...

@JohnP_Collatelt

#EFAchat I'm always a big fan of honesty. Better to disappoint them honestly than just deliver late. Trust leads to more work!

@DragonflyEdit

"...tools designed for the jobs [editors] actually do." @JohnP_Collatelt, what are these tools? #EFAchat

@JohnP_Collatelt

.@DragonflyEdit First, a proofing platform. Markup that doesn't suck, collaboration to save time, project-mgmt to reduce emails. #EFAchat

@EFAFreelancers

Q&A will begin in a few moments. Please hold your questions just a bit longer. :) #EFAchat

@EFAFreelancers

It is a truth universally acknowledged that bad stuff happens. How do you plan for the unexpected? #EFAchat @JohnP_Collatelt

@JohnP_Collatelt

@EFAFreelancers #EFAchat You can't, of course! But you can make contingency plans for the 'known unknowns'.

@JohnP_Collatelt

#EFAchat For the rest, leave slack in your plans - don't plan to work flat out all the time. Slack lets you cope when things go wrong.

@JohnP_Collatelt

#EFAchat Some bad stuff is work-related - the MS with unintelligible prose, the author who fails to respond to urgent queries.

@JohnP_Collatelt

#EFAchat That stuff's not too bad because you can always bill the time to your client (!).

@JohnP_Collatelt

#EFAchat But there's other stuff - computer failures, family emergencies - that just wipes out the chance to work. That sucks.

@JohnP_Collatelt

#EFAchat Only by having a bit of slack built in, and by having the trust of your clients so they give you even more when really needed.

@EFAFreelancers

Regarding @DragonflyEdit's earlier question, please introduce some essential tools you recommend. #EFAchat @JohnP_Collatelt (Then Q&A!)

@JohnP_Collatelt

@EFAFreelancers #EFAchat There're some obvious organisation tools. Excel's very common for scheduling work.

@JohnP_Collatelt

#EFAchat Project-management tools like MS Project are great, but overkill for individuals IMO. Invaluable for managing portfolios, though.

@JohnP_Collatelt

#EFAchat Of course, almost everyone uses MS Word, and that has some real time-saving features most people know these days.

@JohnP_Collatelt

#EFAchat Back in the early 2000s, I used to run a course in using search-and-replace effectively, turning off annoying features, macros etc.

@JohnP_Collatelt

#EFAchat It's amazing how much time you can save by getting the computer to do the easy stuff!

@JohnP_Collatelt

#EFAchat Email's a hugely useful tool. I used to waste hours standing over fax machines back in the 90s. But it can be a time sink, too.

@JohnP_Collatelt

#EFAchat There are general utilities I couldn't live without on my Mac, either. Albert is great for shortcuts. Dropbox syncs my files.

@JohnP_Collatelt

#EFAchat And I'm a big believer in To Do lists. I use an app that works on the desktop and my phone, so I can always be in control of tasks.

@JohnP_Collatelt

#EFAchat Specialist jobs like EPUB work (less specialist these days, I suppose) come with their own tools, too.

@EFAFreelancers

#EFAchat Q&A: It is now time for our question and answer session. Be sure to tag @JohnP_Collatelt in your question.

@JamesWeber16

@JohnP_Collatelt Ever use base camp? Thinking of trying to incorporate it in my blogging schedules & of course any freelance I do #EFAchat

@JohnP_Collatelt

@JamesWeber16 Yes, I used BaseCamp for a short while. Didn't work for me, but lots of people swear by it. #EFAchat

@JamesWeber16

@JohnP_Collatelt Hmm maybe I'll still try it then. #EFAchat

@JohnP_Collatelt

#EFAchat I should possibly have mentioned that I'm in the UK, so any questions about trans-Atlantic issues are welcome, too!

@wordfey

#EFAchat @JohnP_Collatelt, Is there a workflow for billing/dealing with missed payments?

@JohnP_Collatelt

.@wordfey #EFAchat As many as there are publishers and freelancers, I guess!

@JohnP_Collatelt

#EFAchat Billing's fairly simple - do work, raise invoice, submit invoice. Chasing non-payment's harder.

@JohnP_Collatelt

#EFAchat I'm sure we've all had clients who were late or 'forgot' to pay. First step IMO is to make sure you have a clear service agreement

@JohnP_Collatelt

#EFAchat If they don't pay by the due date, send a polite reminder. (Your contact is almost certainly not actually processing the invoice.)

@JohnP_Collatelt

#EFAchat Then ask to be put in touch with Finance and remind them of the invoice terms (15 days, 30 days, whatever).

@JohnP_Collatelt

#EFAchat Find out if there's a genuine issue (system failure, postal strike). Given them some slack. But not too much.

@JohnP_Collatelt

#EFAchat Ultimately, start penalty charges. (Your service agreement with the client did allow this, of course, didn't it?)

@JohnP_Collatelt

#EFAchat Because the trust I talked about needs to go both ways. You're not a charity. If they won't pay why would you work for them again?

@EFAFreelancers

#EFAchat A lot of our editors work in education, & that is your background too. Any specific insights for that crowd? @JohnP_Collatelt

@JohnP_Collatelt

@EFAFreelancers #EFAchat I found education great as an editor because you can always assume that the flaw lies in the text.

@JohnP_Collatelt

#EFAchat That is, "If I don't understand this, nor will the student. We need to make this better/clearer/shorter/whatever."

@JohnP_Collatelt

#EFAchat On the other side, education comes with a lot of complication around compliance, diversity, cultural issues, standards.

@JohnP_Collatelt

#EFAchat My experience was mostly in international markets (product used in ~160 countries) so cultural issues were a big thing.

@JohnP_Collatelt

#EFAchat Working in Education, though, means you know your product makes a real difference to the reader.

@JohnP_Collatelt

#EFAchat The biggest problem, though, is the utter lack of flexibility over deadlines. School years are what they are.

@JohnP_Collatelt

#EFAchat Plus, of course, the fact that syllabuses change at the whim of politicians & don't always make a lot of sense in the first place.

@JamesWeber16

@JohnP_Collatelt @EFAFreelancers Any recommendations for young editors trying to build their chops? #EFAchat

@cherapple

Or older ones rebuilding them? MT @JamesWeber16: @JohnP_Collatelt @EFAFreelancers Any recommendations for young editors ... #EFAchat

@JohnP_Collatelt

.@JamesWeber16 Nothing beats experience. Take any opportunity for real-world editing. But it has to be professional. #EFAchat

@JohnP_Collatelt

.@JamesWeber16 #EFAchat When I was recruiting for editors, actual editing experience mattered far more than courses or training.

@JohnP_Collatelt

.@JamesWeber16 #EFAchat Best options these days are possibly places like Wattpad - where authors want feedback on their work.

@JohnP_Collatelt

#EFAchat Or, for non-fiction, perhaps try some open-access academic journals.

@JohnP_Collatelt

#EFAchat In-house editors are more likely to place work when busy, so finding out the busy times can help get those important first pieces.

@JamesWeber16

@JohnP_Collatelt I've applied at a few OA journals & pub companies. Seems like a cycle of need xp to get xp. Some success w/ indie #EFAchat

@JohnP_Collatelt

.@JamesWeber16 #EFAchat Yup, that's the vicious cycle of trying to break into publishing, sadly. Look for a niche where you have knowledge.

@EFAFreelancers

Ok! It's time to end today's #EFAchat. Thanks so much @JohnP_Collatelt, for sharing your expertise.

@cherapple

Thank you! RT @EFAFreelancers: Ok! It's time to end today's #EFAchat. Thanks so much @JohnP_Collatelt, for sharing your expertise.

@JamesWeber16

@JohnP_Collatelt Thank U. That's helpful advice. Been working on it but things take time. Anyway, thank U again. Great #EFAchat.

@JohnP_Collatelt

.@EFAFreelancers #EFAchat It's been a pleasure. Thanks for listening and asking questions, everyone.

@JohnP_Collatelt

@EFAFreelancers #EFAchat And don't forget to visit collate-it.com if you want to find out what we're doing. :-)

@EFAFreelancers

#EFAchat The written transcript will end here. See you next time!