

Writing Big Documents : A Step-by-Step Guide¹

I take a very disciplined approach to writing - particularly when producing long/complex reports, submissions or training resources. I believe the following is the most efficient way of producing a quality outcome - that is clear, concise, logical and coherent. As you'll see, I'm big on order ... no, I'm not into S&M ... I'm a Virgo!!!

The process outlined in this handout has several disadvantages:

- **It can be difficult to involve others in feedback on written drafts** until you have a document in a final, ready-to-publish form. The material is simply too messy for other people to understand until it reaches a final point. Arguably, this can lead to disempowerment of others entitled to input into the document. If you need to actively involve others in report content, it's better to use a structured consultation process (eg. based on draft Table of Contents, or using *Visual Planning*²) to gather their ideas, rather than having them reflect on roughly written material.
- **This approach can be pretty scary for you, the writer.** You may have significant gaps, and unanswered questions, in the material until the last few days, or even hours. It can all feel rather chaotic and out of control, until you have one of those *AaHaa* moments when everything falls into place. You have to keep moving through the process in the faith that a concept for the paper will emerge. (Most often, this occurs during Step 17.)
- **It can be difficult to estimate how long the document will take to write.** Quality large documents simply take a long time!

Allowing Adequate Writing Time

Since I am self-employed, I must be able to quote on written work, and allow sufficient time to produce a report before planning to start another job. The time required for writing documents can vary enormously, and is very difficult to predict. However, I have developed some workload planning formulas that are relatively safe and accurate.

In retrospect, documents end up taking 1 hour per page with amazing regularity. However, they also have a nasty habit of determining their own *natural* length!!! This largely depends upon the number and variety of source documents being used. The formula I use for estimating the total number of hours a report will require is:

¹ © Copyright Suzi Quixley 2008.

² *Visual Planning* is a training and development process developed by Suzi Quixley. A short handout is available on request, **OR** details are included in Quixley, Suzi (1995) **8 Participatory Training/Learning Methods**, ESSQ, Bowden, SA. (30 pp; ISBN: 0 9587640 3 4).

ESTIMATING TOTAL NUMBER OF HOURS

Formula: No. of planned pages x 1 hour per page + 50% = total hours
Example: 40 page document x 1 hour = 40 hours + 20 hours = 60 hours.

Hopefully, the report will come in on page length, and take fewer hours than this! But, it's hard to predict, because some of the process is quite conceptual. You need to allow plenty of thinking time to come up with the overall framework/structure and line of argument. I often get my best moments of clarity when I put the document aside for 24 hours. And, I often find I need to do this several times during the latter parts of the writing process for a big report, or one which uses many/varied of source documents.

Document writing typically requires a much higher level of concentration than most other tasks. Therefore, it is important to plan for the possibility that you will be unable to maintain this level of concentration for more than 4-6 hours per day, depending on both your work location and whether you can fully dedicate to writing. I work in a home office, with minimum disruptions and distractions. Yet, even when I'm fully dedicated to writing a single document, I find I can rarely maintain the level of concentration required for more than 6 hours per day.

TOTAL NO OF WORKING DAYS

Formula: Total hrs/minimum hours per day + 5 days reflection = total wk days
Example: 60 hours/4 hours = 15 days + 5 days = 20 working days

And ... always assume that you'll only be working for 5 days per week. (You just might need those weekends if the word length really blows out!!!) Therefore, you'd need to allow 5 weeks to write the example document.

Ongoing Processes

I have found that **strictly** adhering to these processes dramatically increases the overall efficiency of writing:

- Compile the Bibliography as you go. Write out the full referencing details the first time you use each document and locate it in alphabetical order.
- Every time you use a source for a quote **or idea**, write down the in-text referencing details exactly as they would appear in the final report (eg. Jules & Verne 2008:4). This saves you from ever having to return to the source document, unless you are looking for new ideas or to fill out detail.
- Open a new Word Folder for the document. Create a sub-folder for all materials from other sources. Save a copy of every softcopy document you use in this sub-folder. Name each document by first author, short title and year.
- Once you have finished using a hardcopy source document, file it away. The only documents in your workspace should be those you have not yet fully processed.
- Keep a list of Acronyms for commonly used titles, as you go.

Step-By-Step Writing Processes

1. Select colour scheme & fonts. This may seem a frivolous first step, but in fact it's important. It will make your document easier to scan and use. It's also the most efficient way of ensuring consistency of colours/formatting throughout the document.
2. Draft the title page and publication details.
3. Develop a draft Table of Contents *off the top of your head*, or based on any predetermined structure. If relevant, read the project brief for the document. Highlight any non-negotiable headings in green.

Creating an initial *picture* of the document ...

4. Identify the major documents you plan to use for your report. This might include pre-existing submissions, other reports on the topic or research documents.
5. Print out hardcopy of all these documents. This may seem like a waste, but it contributes significantly to efficiency of writing. I print hard copy of any document I expect to refer to more than once, or in more than a single sub-section of the document.
6. Scan these documents quickly, to get a feel of the material.
7. Revise the draft Table of Contents, adding any sub-headings that have emerged from your reading.
8. Re-read the project brief to ensure that you are *on track*.
9. Put each heading and sub-heading at the top of a new page in big letters. Use a different font size and colour for different levels of headings.
10. Jot down any key content ideas that have emerged from your scan reading:
 - These should only be ideas that at *the top of your head* - **Do not refer back to any documents.**
 - It is critical that you write *as you speak (Plain English)* - **don't** try to use formal language.
11. Put all hardcopy documents in a pile, according to level of importance with the most important documents on top.

The long, tedious stage ...

12. Work through the document pile, reading one at a time. For each document:
 - Take detailed notes (including page numbers).
 - Where the author references another source, note this (eg. Smith & Jones cited in Brown 2007:3)
 - Locate all notes from this document under the draft report headings, writing in Plain English except when recording word-for-word quotes.
 - Double-check that all quotes are accurate, in italics and correctly referenced.
 - **Do not keep any loose notes** - throw any rough notes on separate pieces of paper away before moving on to the next document.
 - After you've finished using each document, file the hardcopy away.

13. Read through your draft and highlight every secondary reference to a primary source in **red** (eg. Smith & Jones cited in Brown 2007:3):
 - Search out the primary sources wherever possible.
 - If you expect to use this source more than once, save softcopy and print out hardcopy.
 - If not, simply add it to the bibliography and keep softcopy in the document sub-folder.
 - Create a new document pile, and repeat Step 12 (above) for this new pile.

The most conceptual stage ...

14. Identify any headings with little or no content. Are these important?
 - If the heading is important, look at whether the material it should contain is located under a different heading, and move the data to this new location. Note any need for extra research in **red**. (NOTE: You will not return to address these gaps until much later - Step 19.)
 - If it is not important, delete the heading.
15. Work through the draft document, section by section, and text the notes using Plain English. Delete any obvious repetition within the section and replace repeated words with synonyms as you go.
16. Add recommendations at the end of each block of relevant text.
17. Save this as Draft 1, and copy into a new file called Draft 2. (This is so you can go back to your original notes if you decide to reinstate deleted text during these later stages.)

(Skip Steps 18 and 19 if the document does not include recommendations.)

18. I have found that the easiest way to review the overall structure/concept of a document is to review the recommendations. Re-read your project brief to help you stay on-track. Copy all recommendations into a separate document and print out hardcopy:
 - **Is there any repetition?** If so, decide on where the idea is best located, modify the relevant recommendations, and move all related text to the new location in Draft 2 of the full document.
 - **Are they coherent?** If there are any contradictions or incongruence, decide how to deal with these. This might involve revising or relocating blocks of text.
 - **Are they relevant?** If any recommendations are irrelevant, then the text may have strayed away from the topic as well. Delete irrelevant recommendations, and decide whether the supporting text is critical to the subject of the report. If not, delete it! If it is important (eg. it provides necessary contextual information), decide where to locate it.
 - **Are they proportionate?** Sometimes you end up with many recommendations in one area, but only one in another. This is fine if it reflects the relative importance of the issues. But sometimes, it simply reflects the areas in which you happened to have the most information. You might need to replace several lower-priority specific recommendations with a single broader recommendation. In a high priority area, you might need to create several specific recommendations to replace a single general recommendation. Once you've

modified the recommendations, summarise any less important text and note areas for further research in red.

- **Do they flow in a logical way?** If the recommendations flow logically and smoothly, then so will the text! Again, move recommendations and blocks of text as required.
19. Review all the gaps highlighted in red. Did any of your original source documents cover these areas? If so, go back to these documents. If not, undertake further research to address these gaps. Again, use the process in Step 12 (above) to process this new information.
 20. Take a 24 hour break.
 21. Print out a copy of Draft 2.

Time to focus on presentation and writing style ...

22. Re-read the project brief. Read the whole document, modifying obvious problems with structure or content as you go. Remember, **how words look on the printed page** is important to how people read/absorb them, and their level of impact. **Refine your style** - continuing to use Plain English:
 - Split long sentences into shorter sentences, whenever possible.
 - Do an edit/replace³ on words/phrases/acronyms you may have used inconsistently.
 - Replace repetitive words - a Thesaurus can be useful.
 - Decide when to number/dot-point/text. Note that sometimes repetition of a layout formula or key words adds impact to a series of dot points.
 - Check your use of black and coloured bold. Is it consistent throughout? Does it highlight **only** the ideas you **most** want the reader to notice.
 - Do a full spelling and grammar check.Save Draft 2 and copy as Draft 3.
23. Take a 24 hour break.
24. Print out a copy of Draft 3.
25. Re-read the project brief. Read the whole document without making any changes. Jot down any ideas on structure or content on a separate piece of paper.
26. Work through the ideas you noted, and make any necessary structural or content changes, still using Plain English.

(Repeat Steps 23 - 26 until you are happy with the *Plain English* version of your document ... save this Draft for future reference.)

Writing for your audience ...

27. Create a final Draft. If necessary, work through the document from beginning to end, translating from Plain English into the bureaucratic, legal, industry or

³ This is one of my favourite Word tools. Click "edit", then "find". You can either simply search every use of the word or phrase in the document, or you can go further and select "replace". With "replace" you have the "replace all" option - which automatically replaces every use of a particular word or phrase in the document with consistent language.

academic language required for the document's audience. **NOTE: It is critical that this translation doesn't occur until the end of the process**, because:

- It is more difficult to identify conceptual or structural problems if they are *veiled* in obscure language.
 - You can only be confident that you know what you're saying (the content) if you can explain it in Plain English.
28. Check all spacing. Is there the same number of lines above and below each level of heading? Are there any headings 'hanging' at the bottom of pages?
 29. Print out the final document, except for the Table of Contents.
 30. Enter page numbers in Table of Contents and print.

This final draft document is now ready to pass onto any other people for review. Save this draft!

Incorporating Feedback

Remember, you might need to revise the document again, based on feedback. If you are accountable to a group (eg. a committee) for the document, it is most efficient to **ask the group to agree on changes** required, rather than making changes based on individual feedback. If you use an individualised process, you can expect to have to write several drafts until everyone is happy with all the changes.

The final steps are:

31. Create a new Draft, and highlight areas marked for revision in **red**.
32. Re-read the project brief to ensure that proposed changes are *on track*.
33. Work through the areas in red, making any necessary changes.
34. Review the title page and publication details, in case you need to acknowledge any new contributors.
35. Print out a copy of this new draft.
36. Take a 24 hour break.
37. Read this draft, checking for repetition, cohesion, relevant, proportionality, flow and logic.
38. Check all spacing. Is there the same number of lines above and below each level of heading? Are there any headings 'hanging' at the bottom of pages?
39. Print out the final document, except for the Table of Contents.
40. Enter page numbers in Table of Contents and print.

FINALLY ... You have completed the Final Draft of the document.

Post-Script - This document took almost exactly 6 hours to write (including re-visiting and editing 24 hours after the first draft)!!!