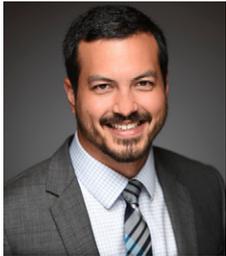# Editorial and Production: Two Sides of the Same Coin

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In his eight years at J&J Editorial, Michael has worked in scholarly publishing in several capacities. From editorial assistant and managing editor to production editor and to the director responsible for all production contracts at J&J, he has worked with big publishers, small publishers, and OA publishers on both sides of the fence. He has also consulted with Editorial and Production offices to help them work better together. The following article is based on his presentation at the 2019 Council of Science Editors Annual Meeting.

As long as publishing has existed, there has been a tension between Editorial and Production. Those who decide on the content to be published, and those who turn the content into a finished form, often have very different priorities. Editorial wants to run a lot of articles, but Production has page budgets. Production has a set schedule, but Editorial wants a piece fast tracked to appear in the upcoming issue. Editorial wants to give a high-profile author white-glove treatment, but Production has a standard process and does not want to deviate.

There will always be conflict between the Editorial and Production offices. Editorial deals in relationships—editors, authors, and reviewers must all be cared for, as few, if any (in scholarly publishing at least), are being compensated for their efforts. If these relationships falter, content generation can stall out. Authors may stop submitting papers. Reviewers may stop wanting to review. Editors may stop making decisions. To keep content flowing, the journal (*i.e.*, the editorial office) must maintain a strong relationship with all of these people.

Production deals in process—each stage must be fully thought out, with systematic checkpoints and feedback loops along the way. If the process breaks (or is broken through misuse) then papers get lost. Figures don't get checked. Publication gets delayed. Errors are generated and not caught. Authors get angry. Rigid protocols must be maintained and followed for Production to continue publishing papers accurately and on schedule.

Editorial and Production are two interdependent entities that, while they have very different short-term objectives, their overall goal is the same: publishing quality content in a timely fashion. However, their differing objectives do seem to stem from philosophical differences in what they prioritize—relationships or process.

Obviously, there is overlap and gray area—Editorial has processes and Production has relationships. But for the sake of brevity I have simplified the objectives somewhat.

It Figures

Figures are often at the center of day-to-day Editorial *versus* Production conflict. Production demands 300 dpi publish-ready figures, but Editorial can only get authors to give figures at 72 dpi. Or, Production typesets borderline blurry figures, and Editorial complains about them at the proof stage. Both offices want high-quality figures but are constrained by what authors can provide, or by how much money is in the budget for re-drawing figures (usually zero).

To streamline the process, Editorial and Production must come to an agreement on what an acceptable figure looks like. Using concrete examples is a great way to jump start the initial discussion. In my experience, it helps if you can find "controversial" figures from actual published articles that meet the minimum standard.

Once this questionable-but-printable figure has been identified, make sure everyone along the publishing chain who evaluates graphics has seen it and has easy access to it. Make it a part of your protocol. Defend it if necessary, and loop in your publisher when disagreements occur. It is common for standards to start to creep over time—someone in the publications process starts wanting higher-quality figures than what was agreed upon. Sometimes the standard can be revisited, and processes can be updated to raise the standard. Usually though, both offices need to adhere to the original standard.

Defining Responsibilities

I once worked with a publisher with Editorial and Production groups that had evolved independently over many years.

Editorial Objectives - Relationship Focused	Production Objectives – Process Focused
Ensure editors and reviewers have everything they need for peer review.	Ensure articles publish on time.
Ensure files are in a **reviewable** state.	Ensure files are in a **publishable** state.
Limit burden on authors.	Have authors "hostage" for requests.
Activity happens over months or years.	Activity happens over days or weeks.
Able to wait until "later" to deal with certain issues.	There is no "later." Everything must be resolved now.

There was a lot of conflict and not much real communication. Whenever an error got published or an author got upset, Editorial and Production were quick to point fingers at each other. The blame game belied (and amplified) a lack of trust between the two divisions.

In response to the specific problems they were seeing, both groups came up with extra checklist items to try and avoid issues going forward. However, since there was no coordination between Editorial and Production, many of these checklist items were addressed by folks from both divisions, resulting in redundancy. Further, Editorial would try to check Production concerns, and Production would try to check Editorial concerns. In other words, the two groups were trying to do each other's jobs. They did not trust their "adversary" to do it well.

Eventually, an unrelated decision was made to change composition vendors. This change became a catalyst for a deep look at the journal's processes and responsibilities to update the overall process to work seamlessly with the new vendor.

A skilled project manager from a different part of the company was assigned the duty of transitioning work to the new vendor. This project manager was also responsible for making Editorial and Production talk and find ways to streamline the publishing process. To accomplish this task, a spreadsheet was created that listed every task, checklist item, staff responsibility, and component of an article. The two teams worked together to decide who was responsible for each item. When they couldn't agree, the project manager served as an arbitrator to make the decision and assign the responsibility to one of the offices.

As expected, they found many redundancies that could be eliminated, and they were able to make the workflow significantly more efficient. Going through this months-long process of communicating and defining responsibilities also created a much better relationship between the Editorial and Production offices. Both teams now knew exactly what they were and were not responsible for, which created the foundation for a much better working relationship.

Communicate, Communicate, Communicate

The key to a good relationship between Editorial and Production is the same as with any other relationship: communication. Editorial and Production should communicate about the big stuff, like policies, vendors, and personnel. They should communicate about the small stuff, like system updates, small process changes, and scheduling. And everything in between. The rule should be to err on the side of over-communication.

Common communication opportunities:

- Adding new article types – Article types can have huge implications for production. They may require new templates, new file formats, or specific style decisions.
- Peer-review systems changes – Production relies on the data exported by the peer-review system. Many production processes are automated, so any data changes must be accounted for and tested to avoid errors.
- Production process changes – It may seem irrelevant to Editorial, but process changes should be talked about in advance. Editorial may not realize they are relying on a certain Production process. Perhaps they are relying on a little wiggle room in the production schedule and need to know if capabilities change, so they can update their expectations.
- Style guide changes – Modifications to journal style often fall through the cracks. Make a point to communicate these kinds of changes across teams.
- Any other changes - Changes are a good opportunity to communicate with your counterparts and reevaluate your processes.

Don't forget: Communication is as much about listening as it is talking. Make sure you take your counterparts seriously when they tell you something! And solicit feedback from them. A question like, "What can we do differently to help your process?" can go a long way.

For day-to-day communication, we have found great success using instant messaging programs like Slack, Skype, or Microsoft Teams. Instant chat between Editorial and Production offices can save everyone time and avoid cluttering email inboxes.

I would also recommend regular meetings with a set base agenda that can be added to. Topics like upcoming issues (including special issues), article pipelines, staff and vendor updates, and ideas for process improvement should be touched on during every meeting. These meetings can be monthly or biweekly, but they should recur regularly and become part of everyone's routine.

You might also consider putting your protocols on a shared drive where everyone can access them to get on the same page.

Finally, an annual workflow audit never hurt anyone.

What If It's Not Working?

You've tried the strategies listed above. You've made communication a priority; you've cleaned up your process; you've done everything you can on your end, but you're still not on the same page as your counterpart on the other side. What do you do?

At this point, it's time to bring in the person who sits in the Publisher role, that is, the person with the authority to make significant changes across your publishing process. The problem could be budget, as in there isn't enough budget to publish the number of pages you're trying to publish. The problem could be a fundamental disagreement between Editorial and Production leading to an impasse. Or the problem could be that someone on staff isn't pulling their weight. This is not an exhaustive list, but these are the most common Publisher-level issues I've seen between Editorial and Production.

Your Publisher's job is to make sure the various teams are working together, but they need to hear from you if something isn't working. Document whatever problems you're having and communicate them. Keep in mind that making Publisher-level changes can take time, so keep communicating with your Publisher until the situation improves.

Key Points

The take-home point I'd like to impart is that we're all on the same team. We're all trying to publish important work in a timely fashion. Understanding the different sub-priorities of your colleagues can lead to better cooperation and fewer headaches, and an overall better publishing process.

So, communicate and listen to your counterparts. Assume they are working in good faith and doing their best. Production can be a mystery to Editorial, and *vice versa*. Communicate your policies whenever you get a chance, including the *why* behind the policy. Walk your colleagues through your process if you can. Ask for what you need and help your counterparts out when they need something.

The key is to align differing objectives into a harmonious whole. Adhering to the tenets of communication and mutual respect will create a team that works together seamlessly.

And please, Editorial staff, if you can help it: Send articles to Production on a rolling basis, not in one big batch. Thank you.

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