COLLABORATIVE WRITING IN COMPLEX CONSULTING PROJECTS

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Originally Written By:
Brenda Foster, MBA1
Xiang (Emily) Long, MBA2
J. D. Moore, MBA1
Charles Hibbard, March

Currently Being Adapted for Project Courses By:
Anne White Harrington, Ph.D.
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PREFACE

The following document on guidelines for group writing was part of a longer report resulting from one of the more bizarre collaborative writing events in the history of the University of Michigan Business School. Eighteen of us – four MBA1s, eleven MBA2s, one Masters of Accounting student, one architecture student, and one professor -- set out to write a report on effective collaborative writing. As you can imagine, writing with so many people led to moments of chaos, conflict, humor, withdrawal, and ultimately (somewhat to our amazement) the production of a draft document.

The outline of our report changed in specifics, but always retained the following four major areas, two of which were eventually combined into one section:

I. The Foundations of Collaborative Writing
   A. Group Aspects of Collaborative Writing
      Mee Oh, Michael Cobb, Monica Meinrath, Steve Pessango
   B. Intercultural Aspects of Collaborative Writing
      Youngsun Kim, Jim Kuser, Bella Mui, Mark Rodrigues, Amy Sheren
II. The Collaborative Writing Process
    Brenda Foster, Charles Hibbard, Xiang (Emily) Long, J. E. Moore
III. Technological Support for Collaborative Writing
     Michael Dolan, Randy Grimes, Sabrina Martinez, Young-Kyun Yoo

The names of the students primarily responsible for each section are listed above. I functioned as project coordinator. With the help of students willing to continue working after the course was officially over, I’m editing, elaborating, and adapting material so it can be used to improve the collaborative writing experience for students in the Business School.

Your input is needed to make these guidelines truly useful for UMBS students. If you have any suggestions or comments, please email me at harringo@umich.edu or stop by my office, B3269 Business Administration.

On behalf of all of us, may your collaborative writing experiences be efficient, effective, and satisfying.

Anne White Harrington
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The University of Michigan Business School
Introduction

As part of their academic work at the University of Michigan Business School, students undertake complex consulting projects in MAP, the Global Projects Course (IMAP), the Tauber Manufacturing Institute, the Davidson Institute, and other field courses. These projects culminate in written reports. These projects are typically so large and time consuming that no one person can do all the work necessary to complete the report successfully. Complex projects necessitate a special type of collaborative writing that involves division of labor and coordination of individual efforts so that a coherent document emerges. Yet too often the resulting report is poorly written, stylistically inconsistent, and marked by overlaps or gaps. Despite the pervasive problems with collaborative reports, students are seldom taught how to write effectively as a group. The following material thus offers suggestions for efficient and effective management of the collaborative writing process in complex consulting projects.

Personal experience and the collaborative writing literature both lead to one conclusion: the key to effective group writing is to manage the writing process as systematically as you manage the other aspects of the project. The collaborative writing process seems to fall into three general phases:

1. Planning the Written Report
2. Developing the Written Report
3. Completing the Written Report

Within each of these phases are more specific steps that are detailed in the following pages.

Any good writing process must at least address the following elements:

- **Adequate group planning.** Each team must discuss and agree upon their paper's topics, outline, and formatting/style issues before any writing activity.
- **Clear definition and agreement around roles and responsibilities.** Each team member must assume some writing responsibility. Work load should be distributed strategically and equitably among all members of the team.
- **Establishment of writing milestones.** A realistic timeline for completing the paper must be determined and integrated into the overall project plan. This timeline should allow sufficient time for drafting, proofing, and editing the document.

The guidelines offered here are suggestions of best practices based on writing project management literature, the writers' own experiences, and advice gathered from MBAs experienced in groupwork. The guidelines offer a sample approach; they are not intended to represent the only approach to collaborative writing. You should feel free to alter this process according to the specific needs and constraints of your project. However, by
following a systematic writing process, your team will avoid many of the pitfalls so often experienced by project teams.

**Planning the Written Report**

A team charter (agreement or contract) is helpful in the project planning stage. A team charter is a living, evolving document that represents the agreements members have come to on areas critical to the success of the project. A team charter designed specifically for the collaborative report writing is appended; you are encouraged to work through the main questions on the charter during the planning stage of the writing process.

Using a team charter has several advantages. The charter allows teams to address potentially problematic issues up front and to come to agreement on how they will address issues before they become serious problems. In addition, discussing a charter tends to move teams more quickly through the forming and conflict stages of group development so that they can advance to norming and, most important, performing. Finally, the team charter is a touchstone throughout the project. It can be returned to as a check on basic understandings, for example, on the goal of the project; it can be used as a source of conflict resolution when differences arise; it can be used as a reminder to members of the standards that were agreed upon, such as turning in draft documents by a specified time.

**Step 1: Determine the Writing Goal(s)**

Project planning is the most important step in the collaborative writing process. It is in this process that the goal of the document is discussed and determined. In the appended writing process charter, the goal is the first area to be discussed. Is the goal of the document to serve as a practical tool or to inform the reader about an unknown topic? Is it to provide implementable recommendations or visionary strategies? Who will be the target audience? The secondary audiences? What kind of report will best meet the needs of the primary audience(s)? For instance, if the deliverable is a MAP or IMAP report, it is important that the document is in line with the goals of the MAP company sponsor and faculty team.

Goals need to be stated precisely to be effective guides. A clear goal is “to create a written document that offers feasible, immediately implementable recommendations for reducing turnaround time by 30%.” A vague, less useful goal statement is: “to create a written document that will be useful for the company.” A clearly stated goal also helps to ensure that the document is consistent in content and tone. Every member must discuss the goals and express ideas so that there is shared agreement and buy-in.
Step 2: Develop the Outline

The next step is to develop a preliminary outline for the deliverable based on this project plan. Developing the preliminary outline actually involves several phases. First, agreement must be reached on the overview or categorical outline. One approach to this is to layout is to define the focus of the document, the audience, the high level topics and parameters, such as in the following example.

<table>
<thead>
<tr>
<th>Focus</th>
<th>Process Improvement Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience</td>
<td>Company Managers With Investment in the Process</td>
</tr>
<tr>
<td>High Level Topics</td>
<td>Purpose, Background, Industry Analysis, findings, Recommendations, Next Steps</td>
</tr>
<tr>
<td>Parameters</td>
<td>One page executive summary, 20 page document, unlimited appendix</td>
</tr>
</tbody>
</table>

An alternative is to use the known categories for a standard report, knowing that they may be altered or specified as information flows in. For example, a conventional MAP process improvement report has the following categories:

I. Introduction  
II. Background  
   A. Company  
   B. Project  
III. Process Analysis  
IV. Recommendations  
   A.  
   B.  
V. Implementation Issues  
VI. Conclusion

The outline organizes the ideas stemming from the goal. It ensures that no information is missing and that all information in the document is consistent and fits together. The overview guides content selection so that inclusions are appropriate for the target audience. The entire team must be involved in this process and must accept the overview outline and approach taken to the report. Laying out the entire document guarantees that each person knows how his or her section fits in the overall plan.

Step 3: Assign Roles and Responsibilities

Once the outline has been developed, it is important to determine writing roles and responsibilities. Writing responsibilities are here defined quite broadly. In addition to the obvious act of drafting text, writing activities may include summarizing interview results,
designing graphics, providing statistical analyses, pulling together material for appendices, and so on.

Each person must know what the others are going to do, as well as how his or her individual part relates overall project plan. These roles and responsibilities should naturally be based on the strengths and weaknesses of the group and distributed appropriately among all team members. Doing this is an efficient way to write the document and will produce a higher quality deliverable.

In assigning tasks, it may be beneficial to allocate section assignments and to designate needed roles, such as editor, review partners, and group facilitator.

- Section Allocation. Although not all group writing involves giving section assignments, it is often necessary in complex consulting reports to divide the potentially overwhelming amount of content into manageable sections. It also allows specific individuals to take ownership of a section; usually providing better results.
- Editing. Editing is a major part of the writing process. Teams should discuss their plans for editing and revising the document. With complex projects, it is sometimes helpful to designate one editor who has final say on style decisions and who can give the report a consistent tone. Review partners help the editor by providing feedback to other people and a method to review the writings to make sure that everything remains consistent.
- Facilitation. A group facilitator makes sure that the process plan is being adhered to and that potential problems are minimized in the writing process. The facilitator makes sure that the overall paper fits together and seeks to gauge what remains to be done.

**Step 4: Establish Guidelines**

Writing guidelines for the document should be established up front. This practice makes compiling the work of individual team members a seamless task; it reduces misunderstandings and conflicts once the writing begins. Team members should come to agreement on format, organization, and style standards – and should be held responsible for adhering to them. Format standards include specifications for: margin set, headers (style and spacing), font, print size, use of typographical emphasis (bold, italics, underlining), depth of indentation, lists and bullets, etc. Organization issues include agreement on overall outline form, internal templates, arrangement of evidence, and so on. Style issues include point of view (first, second, third person), voice (active, passive), tone (formal, informal), sentence structure and length, paragraph development (length, specificity), internal templates. Although it is probably most desirable to decide all these in the project planning stage, the critical decisions at this point involve format and organization. Style issues can be addressed immediately prior to drafting, when they are most relevant; in fact they are likely to be given most attention at this point. Teams might produce a simple checklist of the decisions for easy reference. The key point is that if these issues are addressed before writing, there is less likelihood of wasting time putting together inconsistently formatted documents when the team is under serious time pressure during the drafting and editing phases.
**Step 5: Determine Schedule**

Establish a schedule for completing each part of the deliverable to provide guidance for the team and a realistic timeline for completion of the task. It is important that the group members have a comprehensive awareness of the project plan, understand specific responsibilities of all members, and a schedule covering production of the deliverable. The schedule ensures that every section of the paper is given adequate time and there is not a rush to edit. Additionally, if there is artwork, color graphics, massive copying or collating to be done, the schedule should allow sufficient time for these tasks as well. This writing schedule should be integrated into the overall project plan. By including writing tasks in your project schedule, your team should take a more discipline and gradual approach to completing a high quality, on-time deliverable. It is critical to check progress against the schedule throughout the course of the project.

**Developing the Written Report**

At the beginning of the development phase, all team members should have a copy of the overview outline of the entire report, the writing schedule, and the responsibilities of each individual. It is preferable to have these things in writing. In addition, members should have an understanding of the importance of their contribution to the project and a sense of what consequences will occur if they do not fulfill their responsibilities. It works best to be open about potential concerns and problems.

**Step 6: Research**

Once the group agrees on the project planning outputs and assigns tasks to each team member, the research work should be divided among the group to avoid any overlap or duplication of effort. A direction for each individual should be set to ensure the thoroughness of the research.

**Step 7: Review Progress and Exchange Information Periodically**

Periodic meetings, either face-to-face or electronic, should be used to keep all group members informed and to ensure parallel processing. In addition to updating each other on progress, group members might check individual progress against the project schedule, make sure all members are adhering to the established standards, and discussing items of concern. This will prevent a problem where some group members are unable to meet the established deadline thereby hampering the progress of the whole group. In order to maintain the consistency of the whole paper, each individual should understand the larger context of the entire paper before writing his or her own section. Group members should bring important materials together, and exchange information, ideas, issues and concerns; this exchange facilitates peer reviews and later group reviews. Progress checks are also a good time to surface and address potential disagreements among group members and deal with sources of conflict in an open and constructive way.
Step 8: Develop the Working Outline

The working outline is the backbone of the paper. The level of detail and format required on the outline should be made clear (e.g., a three-level outline written in phrases or a four-level outline in complete sentences). In some teams, each member takes ownership of one or more sections, developing a detailed outline to share with the group. In other teams, two or three members work together to produce a section outline. With either approach, the outline should identify content clearly and precisely. It is sometimes helpful to indicate expected page counts and writing time. The detailed should be ready to expand to a paper just by elaborating on the headings and subpoints. A hidden advantage of this step is that it forces all members to do both thinking and writing prior to the last minute.

Once the detailed outlines for each section have been developed, they should be pooled together to check for completeness, consistency, and length. If the merged outline needs to be changed, or big holes are detected, it is relatively easy to correct and revise at this point to make it sound. This stage may take longer than expected, but the time spent is worthwhile to catch errors before it is too late to correct them. Group members should also be aware of when to strive for consensus, and when not to.

Step 9: Gain Agreement on the Working Outline

Using a working outline that all team members accept is critical because of the significant effect it has on reducing problems with individual sections drafts, conflicts over content, and the time needed for revision of the text draft. The detailed outline should be agreed upon before starting the first draft. Do not overlook this step. It is of extreme importance to gain agreement now rather than rehash old issues at a later date. Avoid this frustration by taking the time to communicate and resolve conflicting issues.

Step 10: Write the Individual Section Drafts

Do not strive for the perfect paper at this stage. Using the detailed outline and preliminary graphics, write a first draft; essentially a rough working version in which you get your ideas on paper. Make sure that important reference information is available and that you follow the agreed-upon format for your document. The format is very important to follow during the working stage. The drafts should conform rigorously to the established team outline as well as the writing guidelines set by the overall group.

Step 11: Solicit Feedback and Revise Individual Section Drafts

When the draft is finished, you should solicit feedback on your work from other team members and people external to the project. Soliciting feedback is important in identifying errors, omissions, illogic, and inconsistencies in the drafts before they are merged to create the group document. Revise based on judicious incorporation of suggestions, established team writing standards, and principles of effective professional writing.
One effective approach to gaining feedback is to use **review partners**, dyads established in the project planning stage, to critique each other's drafts and provide constructive criticism. Suggestions to keep in mind when reviewing drafts are:

- Ask your partner what kinds of things they were trying to do. What were their objectives and concerns?
- Begin reviewing by looking at higher order concerns such as content, interest level, persuasiveness, general organization, and clarity of discussion. This is important because it is a waste of time to wordsmith sentences that may be dropped from the document if major reorganization is required. After the higher level issues have been addressed consider more specific issues such as sentence structure, punctuation, word choice, grammar, and spelling.
- Base your criticisms and suggestions for improvements on generally accepted guidelines, concepts, and rules.
- Explain the problems you find fully. Use specific details to illustrate your case.
- Suggest a correction or preferred alternative for the problem noted. Explain how the problem can be solved.
- Avoid rewriting the entire draft.
- Find positive, encouraging things to say as well. People are more amenable to constructive criticism when coupled with some complimentary feedback.

**Completing the Written Report**

The final phase of the project is signaled by the completion and merging of the individual drafts. Each member should deliver the draft on time to ensure the whole group’s progress.

**Step 12: Merge Individual Section Drafts into a Text Draft**

If all group members have followed the guidelines established for organization, format, and style, it should be comparatively easy for one person to merge all the sections into a somewhat coherent draft of the entire text. This draft will reveal any missing material while there is still time to fill in gaps, create graphics, and find needed data.

**Step 13: Solicit Feedback and Revise Group Text Draft**

Once the text draft has been compiled, the group should review the text of the report in its entirety. The whole group should be involved in this review as a checkpoint for group understanding. Spelling, grammar, and word choice are not the primary concerns; rather the group should focus on the following three important criteria:

- Areas of Elaboration
- Areas of Overlap
Inconsistencies

It is critical at this point to show the compiled text draft to people who have a stake in the content and quality of the report. In the kind of consulting reports produced by UMBS students, these people are typically company liaisons or decision-makers and faculty advisors. A helpful thing to do is to let the people reviewing know that this is a rough draft and that you are soliciting input on content, organization, and audience-appropriateness rather than on mechanics or sentence structure. Listen non-defensively to reviewers' suggestions, discuss alternatives with your team members, and then use your good judgement about incorporating revisions.

Teams differ in the approach they take to revision at this point. Some teams prefer to have one person make all the revisions in the belief that a stylistically coherent document will emerge. Other teams prefer that individuals edit their respective sections based upon the group review and consensus about changes to be made (in this case, individuals must be told explicitly what to do to improve their sections). Still other teams prefer to identify a small editing task force. However the revising is done, at this point the goal is to produce a coherent whole and the focus should be on organization, unity, and clarity of the completed section. This is easiest if the editor(s) have a clear understanding of the goal of the document, a comprehensive view of the whole project, and an understanding of the target audience. In addition, it will be clear what needs to be done to the document and someone must have responsibility for seeing that it is done.

**Step 14: Produce Prototype Report**

Having made or received the final revisions to the text draft, the editor will produce a prototype report. The prototype report is a mock up of the final report and includes all front matter, figures, references, and appendices. It should be as close to a final version as possible. In fact, the prototype draft is what most project terms submit as the final report, only to gasp and groan later as they realize they forgot to remove the "add data here" notations or the overlap between the sections George wrote and the one's Mary wrote. By seeing the document as a whole, team members frequently get excellent ideas about how to display data or communicate content in a way that is compelling. Allowing sufficient time to review a complete version of the report ensures quality in the final product.

**Step 15: Solicit Feedback and Revise Prototype Report**

As with the text draft, external reviewers should be given opportunity to comment. At a minimum, the group should meet with the project sponsor/manager to ensure that it meets the expectations and required goals specified during the project planning phase. Keep in mind, this is a final review. The project team should have communicated with the project sponsor/manager throughout the project. There should not be any surprises at this stage.

All team members should review the prototype with the intention of catching any oversights in content and organization. Problems in style and mechanics should be
brought to the primary editor's attention. To avoid problems in version control and
duplication of efforts, it is usually best to have one individual assume responsibility for
the final incorporation of revisions to the prototype. Software such as the revision tool on
MS Word facilitate integration of comments and changes from multiple reviewers. These
applications also reduce problems with version control.

**Step 16: Produce the Final Report**

The team editor or facilitator should perform the necessary tasks for printing and
reproducing the document.

**Step 17: Celebrate!**

And reflect on what made your writing team successful so you can do it again.

**Benefits of an Effective Writing Process**

A systematic writing process provides an objective framework from which the team can
hold each other accountable, understand all necessary requirements, and allocate
sufficient time to complete all necessary tasks. Additional benefits to developing and
following a detailed process include: an equitable distribution of responsibility, a
common understanding of the end deliverable, and consistency throughout the final
product.