



FREELANCE EDITING 101

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LESSON #8

Communicating with the Client

How to *get* clients is discussed in the course “[Establishing Your Freelance Business 101](#),” which is offered every September/October/November (or available as the Lesson Pack or One-on-One instruction at any time). But here are some basic tips on communicating with the clients you already have.

Again, this will be somewhat geared toward the publishing industry, but these tips can be applied to other types of clients as well. (Remember Lesson 2?)

When Working for an Author

Initial Communication

First, find out what level of editing the author wants (see Lesson 1). If a client requests a basic proofread, you don’t want to give a thorough critique, substantive edit, and/or line-by-line copyedit. On the other hand, you don’t want to give the client *less* than she is expecting either.

Second, find out if the client prefers that you make the changes yourself or that you advise him of your corrections and suggestions. If the client just wants his manuscript to be free of errors (perhaps because he plans to self-publish), he may want you to go ahead and make the corrections and not bother him with the details. If a client wishes to learn how to write better, she will want to see the changes you recommend so she can study them. Some clients like to see what you would suggest changing so they can decide for themselves if they want to incorporate your ideas or not.

Third, determine how the client wants the work done (see Lesson 4). If the edit is to be done online, is the client familiar with the Track Changes feature? If he’s not, ask if he’d like a brief explanation of the feature so he can determine if he wants to use it or not. If he is familiar with Track Changes, find out if he knows how to use the Comments feature. If not (and if he doesn’t want to learn about it), comments may be inserted in the text (in brackets, all caps, and/or a different color/font).

If the client doesn't want to use Track Changes, decide how additions, deletions, and suggestions will be marked. (For example, you could use the "strikethrough" font for deletions, a different-color font for additions, and highlighting for comments.)

If the job is to be done on hard copy, determine what proofreading symbols you will use and how you will let the client know what the symbols mean.

Many potential clients will request a sample edit before deciding whether to hire you. Once you've determined the level of editing the author wants, you may edit a few pages to give the client an idea of how you would do it. This will also help you determine how long a job might take. (Don't spend more than ten or fifteen minutes on this. You don't want to "give away the store.") Keep in mind, the client will probably send you his best work. So build in some extra time in your estimate to cover those rougher areas.

Level of Editing Requested/Required

If the client requests a basic proofread but you believe that major substantive work is needed, consult the author before proceeding. Provide a list of the problems as you see them, perhaps including a few samples from the text, and ask the client if he or she would be interested in a more detailed edit. Provide a quote for extra editing. Then go with whatever the client says he wants. (The same thing would apply if the client requested a line-by-line edit but you felt an overall critique would be more appropriate.)

Years ago, I had a client who wanted his typewritten manuscript to be input into a computer file. He specifically requested that I not change *anything*. The writing was chock-full of typos and misspelled words and grammatical errors and punctuation mistakes. I asked if he wanted me to at least fix the typos. I was told no. So I did as I'd been requested, even though it was difficult to make my hands type things that I knew were wrong.

When the file was done, the client asked me to email the file to Moody Publishers, who had requested it. Not wanting Moody to think I didn't know what I was doing, I sent the manuscript with a cover email that explained that I had noticed several mistakes but that the author had specified that I not change anything.

A couple of weeks later, a representative from Moody's freelance editing division asked if I would be interested in doing proofreading for them!

The moral of the story: Always do what the client asks you to do, even if you think the job needs more work than the client is requesting.

Agreements or Contracts

You will want to have something in writing that clarifies the above details to avoid misunderstandings between what the client expects and what you are offering. If you've been communicating with the client via email, copies of those emails may be sufficient. But it couldn't hurt to have a summary of the agreement you have reached.

This may be as simple as a brief form you send the client to fill out or as formal as a legal contract, depending on what you feel comfortable with and what the client desires, based on your prior communication.

I have three sample contracts: one for clients who pay by the hour, one for a royalty split, and one for a combination of the two. I also have a basic Editorial Agreement and a sample letter of agreement. (These forms are included in the curriculum for Establishing Your Freelance Business 101.)

I created a Client Communication Checklist that works for most of my clients. (I send an official contract only if the client requests one or if I feel uncomfortable with a client . . . or for a ghostwriting project. Since I almost always insist on payment in advance, the checklist is sufficient for most projects.)

Cover Letter

Include a cover letter (or email) whenever you send an edited manuscript to a client. This letter should include some or all of the following (unless these details have already been communicated through the course of the edit):

1. What level of editing you did. (For example: “As you requested, I have performed a basic proofread for typographical errors and mistakes in punctuation, usage, grammar, and spelling.”) If the client asked for an in-depth edit, and you ended up making a lot of corrections and suggestions, and you’re concerned that the client may be overwhelmed, you may want to say something to try to prepare her for the initial shock/assuage her fears that she is a terrible writer and should give up writing immediately and permanently (unless you think that’s the case, of course).
2. How the editing has been shown (Track Changes or proofreading marks). If proofreading marks have been used, make sure you’ve made it clear what the markings mean.
3. What references you used and why. If you explain to a client that you used the style guide and dictionary that are the industry-standard references for the type of writing he has done (and identify what those resources are), the client will be less likely to argue with you about your corrections. And even if he does want to do things his way, he’ll at least know that he’s going against the norm.
4. How the author should respond to queries, veto any unwanted editing, and make further adjustments. What should the client do if he disagrees with any of your changes? Will you answer questions about your edits for no additional charge? How much extra time are you willing to devote to this? Do you prefer email or telephone consultations?
5. A suggestion that the author double-checks all changes, additions, and deletions before sending the manuscript to an agent or publisher; even excellent editors aren’t infallible.
6. A recommendation that the author checks all quoted matter and citations (if applicable/necessary), unless you’ve done that yourself.
7. An offer to do a second edit (if applicable) after changes have been made.
8. If you did only a partial edit (a few chapters of a manuscript, for example), provide an estimate for additional editing, and let the client know if you recommend she do some self-editing based on your initial edit before sending you more.

9. If you didn't finish the manuscript in the amount of time the client paid for, give an estimate for the cost to complete the project.
10. You could include suggestions of agents and/or publishers. If the current project is really close to completion (or, in your opinion, should be scrapped altogether), you could provide ideas for other projects the client seems qualified to work on.

ABOVE ALL, make sure you say some *nice, positive* things to the author about her manuscript. Writers tend to be insecure, especially new ones—though even those who have been published multiple times always wonder if *this* manuscript is any good. Assure the author by specifically pointing out what you *liked* about the manuscript. *Start* with something positive, *end* with something positive, and *intersperse* positive comments throughout. Even something like “Nice!” or “I like this!” at the end of a line or paragraph is encouraging.

Even if you thought the manuscript was terrible, focus on how to help the client improve. (For example, you may want to provide a list of recommended books on writing that you believe would be particularly helpful.) If he is willing to put forth the effort to learn how to write better, and if he is willing to pay you for part of that education, this can be a mutually rewarding relationship. You may be surprised how much your client's writing improves as he studies your edits and learns the exciting and fulfilling craft of writing (and rewriting and editing and polishing and proofreading).

Close the cover letter with a brief paragraph, such as “Looking forward to our next project” (if the client has indicated there will be more) or “I would love to work with you on the rest of this manuscript (or any other writing you may wish to have edited)” or “If you have questions, please feel free to contact (call and/or email) me.”

Remember, when the client sees she's received a response from her editor (especially if this is the first time you've worked with this person), she is going to be *very* curious (probably on pins and needles) what you thought about the work, what she's going to get from you, etc. The cover letter is your opportunity to give clients a brief overall assessment of the work and a description of what you did for them. It gives them a chance to ease into your edit. When they open the attachment (or turn the page), and they see all the “red marks,” most clients (even those who have worked extensively with editors in the past) are often taken aback, at least for a moment. The cover letter can help the client prepare for that “first-page shock.”

When Working for a Publisher

First, find out what the publisher wants you to do. Are you being hired to strictly proofread for typos and mechanical errors? If so, resist the temptation to rewrite and make editorial comments or changes.

Are you supposed to communicate with the author or strictly with the publisher? What should you do if you have questions for the author about the material? Do they want you to create a list of questions and/or a style sheet?

If you are permitted to have direct contact with the author, get in touch with her right away to initiate communication, establish good relations, and ask any necessary initial questions. Find out from the publisher if they want you to cc them on all emails between you and the author.

Determine if you are to make changes yourself or recommend changes to the client. Often, there may be a little of both. For example, the author and the publisher may want you to go ahead and correct any actual mistakes, but let the author know if you have suggestions for improvement.

As mentioned above, find out if the author is familiar with Track Changes, specifically the Comments feature.

If house style involves a global change (lowercasing a term the author has capitalized, for example), alert the author early on. Most authors are content to submit to house style; those who are not may be willing to compromise. If the author is insistent on something contrary to house style, you will need to communicate that request to the publisher/project manager for a final determination.

Check the manuscript carefully for anything that may be offensive to some readers (words that could be considered profanity or forms of profanity, phrases or sections that might be construed as racial or gender slurs, questionable or controversial doctrinal issues, statements that could be libelous, etc.). Different publishers have different levels of concern regarding these matters, so make sure you are familiar with your client's preferences and communicate that to the author if needed.

Also, watch for anything that might be an infringement of copyright (such as quoting song lyrics that are not in public domain). Find out if the author has done the necessary research to determine the status of the work (if there's a question) or do the research yourself. Notify the author of any problems you see. If the author insists on keeping material in the manuscript that could get herself or the publisher into legal trouble, notify your client to handle the situation.

Sending the Edit

If the client sent you the file by email, you will probably send the edited manuscript back to the author in the same way.

Hand-marked, hard-copy manuscripts should be photocopied before you mail them, on the off chance the client does not receive your work. If it is lost in the mail, and you don't have a copy, you will have to reedit the manuscript at no charge to the client on a rush basis. (Alternately, you could send the edited manuscript by traceable means. But even if you have "proof" that the client received the material, if he lost it or claims he never got it, you're no better off.)

Additional Edits

If the author sends the same material for a second edit, go through it carefully to see what the author has done, checking that all queries have been answered, and edit any new material.

If the author has only made a few changes, suggest he mark the changed parts (either with Track Changes or in a different-colored font or highlighted) *on the manuscript you edited* so you don't have to proofread the same material all over again and make the same changes you did before.

Follow-Up

If you mail an edit, you may want to call or email the client to let him know it went out. (But be prepared: the client will probably want a preview—"What did you think?" "Did you like it?" etc.) You could also follow up a few days later to verify that the client received the edited manuscript.

If you email an edit, and you have the client's phone number, you may wish to call the client to let her know that she should check her email inbox.

You might want to follow up a few weeks (or months) later to see how the client is doing. Did he have any questions about your edits? Does he need any additional editing (either a second edit of revised material, additional chapters, or a new manuscript)? Find out if he is happy with your work—encourage an honest response by asking if there's anything he can think of that you could have done better, that would have suited his needs better, etc. If the client is pleased, ask if you can use him as a reference or use his comments in your promotional material/website. If he's not satisfied with your work, see if there's something you can do to make him happy. If not, offer to refer the client to another editor you know personally or refer him to the Christian Editor Connection, www.ChristianEditor.com.

Following up with clients after the job is done often leads to opportunities for you to work with those clients again. It also shows them you care about more than just their money. And it allows you to tell the client how much you liked her work. ("I was just thinking about that great manuscript of yours that I edited for you a couple of months ago, and I was wondering if you've done anything with it.") The more you can sincerely compliment authors and make them feel good about their writing, the more likely they will be to hire you again (and to keep writing, which will give you more editing work).

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LESSON #8 ASSIGNMENTS

Please complete at least three assignments to qualify for the Certificate of Completion.

Assignment #1

Create a template for a letter and/or email that you would send with a sample edit to a prospective client.

Assignment #2

Create a template for a letter and/or email that you could send to a new client, asking for clarification of what level of editing is desired, how the client wants the work done, etc.

Assignment #3

Create a template for a cover letter or email that you could send to a client (author and/or publisher) with the edited manuscript.

Assignment #4

Create a template for a follow-up letter (or email) a few weeks/months after the job is done.

Assignment #5

Come up with a system you can use to remind yourself when it's time to follow up on a client.

Assignment #6

Remember that promotional piece you did in Lesson 1? Dig that out and look at it. Would you change anything, now that you've learned a few things from this course? If so, do a revised version. If you weren't ready to send that piece out to potential clients at the start of this class, but you feel prepared to do so now, take the plunge and start advertising your services.