



## Editorial Services Outsourcing

Outsourcing Editorial Services for higher quality level & reduced cost.

### Executive Summary

Faced with rising costs and stiffer competition, commercial printers & publishers are constantly looking for new ways to reduce costs, while continuing to create new and compelling content. To meet this challenge, many publishers are outsourcing selected editorial functions, such as copy editing, indexing, abstracting, and content creation to third party providers.

Publishers that have learned how to outsource successfully have found that contracting out editorial services enables them to *dramatically* lower their costs and focus their in-house resources on the core business of developing content that is directly relevant to their audiences. However, there is more to outsource than simply shipping publications and finished manuscripts to a third party provider. Many publishers are not prepared to do this effectively, nor are they sure how to generate and manage value through an outsourcing relationship. Most of them were reluctant to outsource editorial tasks, primarily because they were concerned about quality. Those firms may be missing an excellent opportunity to reduce costs, add bottom-line profits and seize a competitive edge. The same is also true for publishers that do not adopt and execute a cohesive outsourcing strategy.

The key to successful outsourcing is to adopt a mindset that allows publishers to understand what they do best and to determine where they could safely and efficiently hand off selected tasks. A number of publishers have already embraced successful editorial outsourcing strategies, and as a result, are cutting costs and accessing resources that enable them to expand into new markets and launch new product offerings. Publishers that successfully integrate external resources into their existing business model are positioning themselves to exploit new revenue generation opportunities and achieve impressive cost savings.

In this white paper, we will:

- ❖ Managing Value in Editorial Outsourcing Relationships
- ❖ Editorial Services Appropriate for Offshore Outsourcing
- ❖ Seven Tips for Choosing the Right Partner

## Managing Value in Editorial Outsourcing Relationships

To remain competitive, publishers continually look for ways to exploit lucrative new niche markets by obtaining and developing new content, either by acquiring or launching new titles, expanding into on-line markets or by developing rich data products that extend the reach of existing product lines. Moreover, even those publishers not seeking to enter new markets need to reduce costs to stay on an even footing with their competition.

On-staff editors and writers will always play a key role in helping publishers fulfill this mission. But at the same time, the costs of adding staff to back these expansion efforts are often prohibitive and can sometimes limit their ability to ramp up quickly.

Publishers have traditionally hired freelancers to edit manuscripts, or perform other editorial and production services. In the early 1990s, however, digital technology and the Internet began to transform the nature of the publishing business. Primary publishers began to expand the reach of their publications, particularly in scientific or academic journals that could now be accessed on-line. In addition, secondary publishers – which provide access to previously published material – emerged to provide digital content to new markets, such as academic libraries and databases.

Digital technology also made it more efficient and cost effective to transmit large volumes of data overseas, setting the stage for massive outsourcing projects that could yield dramatic savings for publishers.

Abstracting and indexing were two of the first editorial functions to be outsourced offshore. In 1991, one large scientific database publisher began to outsource indexing for its medical information service to an off-shore provider in the Philippines. The project enabled the publisher to cut its indexing costs in half in the first year alone. In the process, they established a virtual library that is now the world's leading electronic medical information service.

Other publishers soon embraced this offshore strategy, and a number of providers, primarily based in Asian countries, have emerged in response. But the option of more choices also carries some risk. While a good outsourcing partner can help a company achieve impressive savings, selecting the wrong outsourcing partner can result in cost overruns and missed deadlines.

That's why it's critical to enter into these relationships with a keen eye for managing value and to look for a partner with:

- ❖ An established infrastructure with access to the latest digital technology,
- ❖ A competent, highly skilled workforce that can ease the transfer of knowledge,
- ❖ A shared commitment to delivering quality output,
- ❖ A management team that understands the goals of the client and can manage the relationship to the mutual benefit of both parties,

Done properly, editorial outsourcing can yield dramatic benefits, with some firms achieving costs savings of 40 to 70 percent, with no loss of quality or compromise of data security. However, when the transition to outsourcing is poorly planned and executed, it can result in over-inflated expectations for cost savings, unrealistic timetables, and damaged relationships. To manage value, publishers need to enter the outsourcing relationship with their eyes wide open and expectations firmly based in reality.

## Editorial Services Appropriate for Offshore Outsourcing

Not every editorial task may be appropriate for outsourcing. Nurturing original or information products are core tasks that often require close attention by senior editors and managers. Those functions represent the core value of any publishing enterprise. Either publishers develop content that meets the needs of their audience, or they fail.

On the other hand, publishers have often found real value by outsourcing more manufacturing-like tasks such as copy editing, content creation, and abstracting & indexing to experienced third parties. In some cases, they even obtain access to resources or expertise that is not available on-staff. Now that offshore outsourcing is a viable option, they can drive dramatic cost savings by funneling vast volumes of content to those providers.

### Copy Editing

To do this successfully, companies need to establish a partnership that includes phases for structure discovery, definition, and transition. Each phase must be carefully plotted and incorporate a set of guidelines and protocols that defines all editorial processes and responsibilities. This includes a knowledge transfer to ensure that the outsourcing partner understands the publisher's editorial standards and style requirements.

There are three levels of complexity in copyediting. The first and least complex is **basic copy editing** for typographical or production errors. The second is **fact checking and grammar**, which in the case of scientific or scholarly publishing often requires validating mathematical equations. The third and most complex are **interacting with the authors** to help them revise the manuscript before publishing. The first two lend themselves well to offshore outsourcing, while the third performed closer to home, although it is not always necessary.

### Abstracting

In this task, the writer or knowledge worker is trying to capture the essential elements of the article or journal content to help readers determine whether the article covers the topic, they are interested in reading. Abstracting is most effectively accomplished, when the outsourcing partner is capable of providing sufficient scale in subject matter experts to meet the skills required by the publisher.

Abstracts should be composed of a pre-defined, domain specific vocabulary that should be developed according to the company's guidelines:

- ❖ **Informative Abstracts**, for example, can reduce or summarize the substance of a text, detailing its specific major points.
- ❖ **Indicative (or Descriptive) Abstracts** can provide the subject of a document by describing its type, the principal points covered and the way facts are treated, something like a table of contents for a book.
- ❖ **Critical Abstracts** offer a synopsis or summary of the text, as well as a reasoned opinion about its scholarly contents.
- ❖ **Structured Abstracts**, which are used for clinical research articles, often follow a recognized and established format, including objective/purpose, methodology and results, and conclusion.
- ❖ **Patent Abstracts** also follow defined structures and elements, and are used primarily for patent application documents. Essential for a smooth outsource of abstracting is that the outsourcing partner has experienced, high-level expertise in the subject matter.

## **Indexing**

Successful indexing requires true subject matter comprehension. Just as a publisher must have specialists in a specific discipline – usually referred to as Subject Matter Experts (SMEs) – the outsourcing partner also needs to have these subject matter specialists with advanced degrees so that they can fully understand the topic. These specialists must be trained to be objective and reader-oriented in their decision-making.

All indexing falls under two categories, controlled vocabulary or free language terms. From there, indexers provide a full range of services, many of which are appropriate for outsourcing:

- ❖ **Subject Indexing...** Assigns topic headings or subject descriptors.
- ❖ **Geographic Indexing...** geographic indicators placed within geographical context.
- ❖ **Event...** Assigns specific headings, such as “mergers and acquisitions” or “product launches”.
- ❖ **Numerical...** Refers to the collection and inclusion of quantities, values and units of measures for technical articles in mathematics, chemistry, physics or other fields.
- ❖ **Chemical...** Specific chemicals and compounds are captured within the index record.
- ❖ **Relational...** Term descriptors that limit the context of the free language terms.
- ❖ **Keywording...** selecting words and phrases directly from content relevant to the main points.
- ❖ **Document Indexing...** defines specific content element such as an editorial or opinions column.
- ❖ **Photo/Image...** entries provide a description of the contents in the image or photo.
- ❖ **Book...** back of the book indexes.
- ❖ **Topic Map Creation...** authoring Topic Maps to declare topics and link relevant parts of information.
- ❖ **Legal...** specialized indexing that focuses on legal documents, such as case law, statutes and regulations.
- ❖ **Bibliographic...** Creation of an index record containing the title, authors and other relevant publication information.

## **Writing and Editing**

Some publishers are also turning to offshore providers to deliver original content within very specific guidelines and formats. Teams of copy writers and editors help publishers achieve cost savings by processing high volumes of content such as fact sheets, proposals and short articles.

## **Content Creation and Enhancement**

Advances in digital media now enable publishers to transform written text into dynamic, interactive products. For example, graphic designers skilled in such programs as Flash, Shockwave, and Photoshop create illustrations, tables and charts that make content more visually compelling. They also create dynamic online content through interactive features such as questionnaires and real-time tests.

## Seven Tips for Choosing the Right Partner

Choosing the right partner is a critical step in building a successful outsourcing relationship. First of all, not every outsourcing partner is capable of providing the full range of editorial services. The service provider needs to have an established infrastructure, a competent and highly skilled workforce, and strong leadership by a management team that understands the goals of the publisher.

To that end, they need to look for seven things as they manage value in an editorial services outsourcing relationship:

1. A company who shares your commitment to deliver quality Editorial product, is subjective at best, and if they are not willing to invest the time to get it right, it will never work,
2. A company which has the expertise and patience to help your editorial staff overcome their reluctance to sharing knowledge. This must be done carefully and with great tact, or the proper knowledge exchange will always be forced.
3. A company with a track record of building the tools and business processes to deliver a quality product and validate the success of their efforts,
4. A company with an efficient & proved recruitment, human resource development and training system,
5. A company that can scale rapidly and effectively to meet new client demands,
6. A company on sound financial footing,
7. A company with a solid management team and change management expertise,

A number of training and management skills must come into play to ensure that the publishers' staff shares critical knowledge and insights with the editorial services team. This is a critical step in integrating the external resources into the workflow as efficiently and swiftly as possible.

## Conclusion

Without question, outsourcing editorial services to an experienced third party can help companies achieve dramatic cost savings – sometimes as high as 70 percent. But the publishers should not stop there, they need to push the envelope and ensure that they are not only receiving equivalent quality, but also higher quality. There is no reason to settle for less, especially when you consider that some outsourcing providers actually employ a deeper pool of subject matter experts than many publishing houses.

In fact, the decision to rely on an experienced third party editorial services provider should serve as a springboard for improving the business in a number of ways. Remaining staff members can spend more time focusing on core activities, whether that includes launching new products or simply improving the existing publications.

Many publishers enter into outsourcing relationships by taking small steps, handing off one or two editorial tasks for a group of related publications in their portfolio. By working closely with the offshore outsourcing partners in a carefully phased transition, publishers can use the resulting cost savings and continued output of high-quality content as the impetus to expand the relationship and build a dynamic business model that the supports rapid deployment to exploit new opportunities.

In addition, ultimately, that is when managing value in the outsourcing relationship opens the door to lasting value for the publisher.