

Managing the Document Review Process

Having your subject matter experts (SMEs) review the content that will form your documentation, Online Help or training curricula is a critical step to ensure both its accuracy and its completeness. However, it is also one of the more challenging aspects of developing content, as the SMEs have other responsibilities, and reviewing content typically is not at the top of their priority lists. Delays in completing SME reviews is the number one cause of missed project deadlines and can be a reason for a project going over budget.

Having managed thousands of projects with any-where from one to scores of SME reviewers, InfoPros has developed processes to make the review cycles as SME-friendly and efficient as possible:

- *Email Reviews* entail sending documents to each of the reviewers. A reviewer may read the document on his own schedule, but the challenges are in consolidating comments and changes, as well as resolving conflicting feedback. Thus, this method can be cumbersome when there are more than two reviewers.
- *Interactive Reviews* are conducted via web conference, where real-time edits are made for all participants to see. They have the advantages of being collaborative and efficient, with the major drawback of coordinating everyone's availability, an issue that can become insurmountable when SMEs are in different locations/time zones.
- *SharePoint-based Collaborative Reviews* allow SMEs to do their reviews according to their schedules while also providing full version control and collaboration. We have seen extensive gains in efficiency using this approach when there are four or more SMEs working from different locations.

InfoPros SharePoint-based Collaborative Reviews

- Secure Client logins to InfoPros platform
- Concurrent co-authoring of documents
- Option to require document check out/check in
- Version control and retention
- Sub-reviews or using different roles in a workflow
- Control of the type of editing that can be done, e.g., tracked changes vs. comments only
- Automated reminder emails based on tracking who has and has not reviewed assigned documents
- Access from anywhere with an internet connection
- Accommodation of reviewers' conflicting schedules, pace and areas of focus

Case Study: Comcast

InfoPros' challenge was to accommodate 45 Comcast subject matter experts, representing 15 areas within Comcast, reviewing 60 articles as efficiently as possible due to tight timelines. Using our SharePoint site dedicated to Comcast, we were able to:

- Create a secure login for each reviewer using his preferred work email address.
- Split articles into four batches, each with its own schedule overlapping that of the other batches.
- Provide/revoke specific access levels for the various groups which changed per the review schedule for each batch.
- Manage multiple overlapping review cycles involving the large number of SMEs in order to keep the project on schedule.

Document review is a critical, yet easily-overlooked component of any content-oriented project. InfoPros manages the process to maximize efficiency by minimizing our Clients' time investments.

Corporate Headquarters: 12325 Oracle Blvd., Suite 100, Colorado Springs, CO 80921
719.593.7377 | 888.235.3231

Locations: California | Colorado | North Carolina | Texas | Wisconsin