

## Co-Authoring Strategies

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*published on <http://forbesoste.com/research/co-authoring>*

What is in it for me? I should have asked myself and my co-author this question before embarking on co-authoring leg of my doctoral journey. It would certainly have been smoother sailing had I learned this before the third attempt. Of course, it is not that simple, but I would have cast off further from the mooring and come into harbor more directly had I been prepared by following this and other guidelines.

Co-authoring experiences vary greatly from one situation to another dependent on the players, the purpose and more. For me, the crew was slightly changed in one leg, another remained but we were struck by cross-currents that hindered communicating tactics, and the third was a test of the newly acquired wisdom that despite many obstacles was smooth sailing.

### The Guidelines:

As a result of these three separate co-authoring experiences in the last six months, I created a set of guidelines for future effort in co-authoring. I have found them very helpful for both myself and others since noting and sharing them with fellow writers and on my blog at <http://forbesoste.com/10-steps-to-successful-co-authoring/>.

#### *Guidelines to Co-Authoring*

- 1. Know your Co-Author*
- 2. Know Yourself*
- 3. Shared Purpose*
- 4. Define Roles & Responsibilities*
- 5. Organize Yourselves*
- 6. Regular Meetings*
- 7. Define a Clear Outline*
- 8. Determine Structure for Tracking*
- 9. Shared Voice*
- 10. Humility*

**1. Know your co-author.** By this I do not mean they have to have met before. I do mean, take the time to learn about them. What are their interests, the skills that can contribute to the collaboration? What is their availability and their life beyond the paper to create context? This helps build trust and rapport as creates a baseline for understanding when "life happens."

**2. Know yourself.** Consider the same for yourself. What are your interests and skills? What you can contribute and your availability?

**3. Shared purpose.** Understand the motivation for each contributor; both for the piece and why and how the piece will be used.

**4. Define roles and responsibilities at the start.** These can be flexible as things come up in the process, but changes need to be agreed upon and clear.

**5. Organize yourselves.** Determine where documents and supporting materials will be shared and accessed.

**6. Regular meetings** that are recorded with action items and deadlines. Just like any process, knowing the next steps helps maintain the flow.

**7. Define a clear outline / framework** to work from.

**8. Determine structure for tracking** changes and saving versions.

**9. Shared voice.** Writing styles can vary greatly; grammar, vocabulary, use of metaphors and images. Determine the best way to have a shared voice that allows the styles to work together without disrupting the flow.

**10. Humility on both parts.** Let the shared purpose determine the editing process, not personal opinion. Respect others work, but also their revisions if they feed the shared purpose.

**The Co-Authoring Scenarios: What went wrong/right:**

In each of the recent co-authoring experiences I learned something new. To be clearer on how the guidelines came about, I will share with you the context and conditions. My personal state was in flux, at Fielding often refers to “life happening.” A transatlantic move, halftime single parenting due to excess business travel, and personal health issues resulted in my limited and sporadic availability.

**Scenario One.** Create documentary film pre-production with everything needed to present to potential investors (fact sheet, budget, synopsis, treatment, shot list and research paper). My co-author was assigned by faculty for shared coursework. There was a nine hour time difference between Sweden and California and we operated on opposing schedules. We had different work-life routines and situations (entrepreneur, married with kids and single social worker). We were at different stages in the PhD program (second term versus submitting comprehensives). Our writing styles and technical capabilities were vastly different, causing us to re-write each others pieces and double efforts during the editing process. Weekly Skype check-ins when missed, created a waiting period until the following week, disrupting the flow. We used my dissertation topic as the content which I am personally and professionally attached to, whereas my co-author was learning about the film production process. We had different levels of expectations as to what was acceptable “good enough” or “great.”

Of course there were opportunities and challenges with each of these elements. All-in-all it was an intense learning experience that resulted in a decent grade and some interesting new perspectives and ideas. Worth noting, a challenge post-delivery: detangling the pieces that were originally mine, so that I may continue to use them in my dissertation and further work.

**Scenario Two.** During the same time period, I was invited to work on a research project with a professor from University of St. Gallen. We were looking at the impact of visual facilitation modes on idea generation in teams. Our goal was to submit a paper for the European Academy of Management (EURAM) conference, Information Visualization track, in Istanbul 2013. We successfully ran one study and were asked to return to do a second round a two months later. This enabled us to gather more data. My collaborator was professor is a highly regarded, well published, department chair. An assistant professor from the same university was to analyze the results from our study. I was involved in the design of the study, and ran one of the groups by providing graphic facilitation. I submitted an overview of my process and input and then heard nothing until the day the final paper was being submitted for the 13th International Information Visualization Conference in London. The paper was accepted to both the conference and the publication with my name as second co-author.

I was of course, please with the result in publishing and conference acceptance. The challenge for me was the acceptance of having little control over how the result were presented. I felt they were skewed somewhat given the conditions, which needed to be explained in the paper more thoroughly. I suppose, in hindsight, I might have presented that more clearly in my overview of the process and input.

**Scenario Three.** The third, and most recent, co-authoring experience worked beautifully despite all odds. Despite many obstacles and life happening in full speed for both of us, we succeeded in creating something that we both felt good about. That is not to say that I have now mastered the art of co-authoring, but having applied the guidelines, I am much better prepared. We created a collaborative film and paper on an intensive which we both participated in. We

were clear on what we were trying to accomplish, what each would do and when we needed help. Respect for each others needs and capabilities allowed us to glide over potential obstacles. One might say we removed the centerboard and allowed for a little drift to get us past them. In the end it was fun and we agreed that we should work together again.

**Conclusion:**

Simply the act of thinking through the guidelines to Co-Authoring has been a great learning process. I am thankful for the opportunities that each has provided me. Even as I head into the wind for a brief pause to complete my move, I feel better prepared for the gale when it comes.