Team review processes and standards

Big-to-small review process

Our review process follows a two-stage approach that moves from high-level structure to detailed polish. This ensures alignment on content direction before investing time in line edits.

Round 1: "Big" - big-picture feedback

The first round of review focuses on structure, content, and overall direction. Reviewers should evaluate whether the document achieves its intended purpose and is organized effectively.

Examples of appropriate feedback in this round:

- "This section feels out of order, would it make more sense earlier in the doc? [Suggest where the move might go]"
- "Can we add more context here for readers unfamiliar with this feature? [Suggest context]"
- "I'm not clear on the purpose of this section; is it meant to inform or persuade? [Suggest a change or an addition]"
- "Could we break this section into numbered steps? It will be easier to follow the instructions that way."

What to avoid: Line edits, rewording, or grammar fixes at this stage. The goal is to align on the document's direction and shape before refining the details.

1. **Reviewer completes review** and alerts the document owner by:
    - Tagging them in the document
    - Commenting on the Jira ticket
    - Messaging in a Slack thread
2. **Author addresses feedback** by:
    - Responding to all comments left on the document
    - Making structural changes as needed
    - Either requesting a second round of "Big" reviews or moving to the "Small" reviews stage

Important: The document should not move to the next stage until all feedback has been addressed.

Round 2: "Small" - clarity, flow, and polish

Once the "Big" review is complete and all parties are aligned on the document's structure, reviewers provide detail-oriented feedback focused on readability and polish.

Examples of appropriate feedback in this round:

- "We should define this term the first time it appears."
- "Consider adding a heading here to guide the reader through the next section."
- Fixing typos, repeated words, or inconsistent capitalization
- Correcting subject-verb agreement or punctuation errors
- Aligning usage with the style guide (e.g., serial commas or list formatting)

Focus areas: "Small" changes improve readability, style, transitions, and tone. The editing pass includes nits and smaller proposed changes like word choice, grammar, minor formatting, and punctuation.

1. **Reviewer completes review** and alerts the document owner by:
    - Tagging them in the document
    - Commenting on the Jira ticket
    - Messaging in a Slack thread
2. **Note:** If you identify a larger proposed change at this stage, leave it as a comment in the document and message the document owner directly. The author should still address the proposed change, but warn them if you have larger content or structural concerns.
3. **Author addresses feedback** by:
    - Responding to all comments left on the document
    - Making necessary edits

    - Either requesting a second round of "Small" reviews or finalizing the document

Important: The author should not finalize the document until all feedback has been addressed.

Team practices

Making direct edits

In most circumstances, we leave feedback as suggestions or comments rather than making direct edits to each other's content. This preserves author ownership and creates an opportunity for learning.

When direct edits are appropriate:

- **Simple grammar and spelling errors** may be edited directly by reviewers
    - Example: Fixing an obvious typo, adding a missing period, correcting indentation
- **Small fixes (1-2 character changes)** can be made directly
    - Anything more substantial should be left as a suggestion

When to use suggestions instead:

Use discernment to identify whether something is a one-off typo or a repeated mistake that presents a learning opportunity.

- **Example of when to edit directly:** A single indentation mistake in an otherwise properly formatted document can be fixed without comment.
- **Example of when to suggest:** If the document contains multiple formatting errors, leave changes as suggestions with a comment explaining why.

Important guidelines:

- Reviewers should not rewrite portions of documents directly
- Discuss with the document's author before making direct changes to any content
- It's the author's responsibility to review comments and implement changes after receiving reviews

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Proposing changes

Proposed changes should be specific and actionable whenever possible. However, if you're unsure how to improve a section, clear communication about your confusion is more important than forcing a solution.

Guidelines for effective feedback

Be specific and actionable:

✅"I would rephrase this to specifically mention the tools used by name."

✅"I'm not sure I have the context to understand this fully, but the wording here is a little unclear to me."

❌ "Rephrase for specificity."

Consider tone:

This is a collaborative process that depends on teamwork and mutual respect. Ask questions to clarify intent before making assumptions.

✅ "What does this abbreviation mean? Could we define it here so it's clear to people who may be unfamiliar?"

❌ "This is unclear."

Align with style standards:

Proposed changes regarding style should align with your organization's style guide, using industry-standard documentation guides as a fallback.

Nits vs proposed changes

Understanding the distinction between nits and proposed changes helps set expectations for what requires action.

Nits

- Preface a comment with **"Nit:"** when it is a minor, optional change
- Nits are **non-blocking** and not required changes
- Nits are often **opinion-based** and not based on agreed-upon style guides
- Authors can accept or reject nits at their discretion

Proposed Changes

- Anything **not** prefaced with "Nit:" is interpreted as a proposed change
- The strength of the suggestion can vary based on the content of the comment
- Proposed changes **require action**, whether that is:
  - Making the change in the document, or
  - Coming to a resolution via discussion

Resolving comments

In Google docs

- A comment with a proposed change should not be resolved until a resolution has been reached and documented
- The author should leave a comment stating they are accepting the change or explaining why they are rejecting the suggestion
- **Comments should only be resolved by the owner of a document**
- Nits and accepted suggestions can be resolved without discussion

Preserving the paper trail

Resolved comments can be viewed by selecting: **View** → **Comments** → **Show all comments**

This preserves a record to document the review and decision-making process.

Document ownership

The author/owner of a document has final say over that document and changes that occur during the revision process.

For shared documents:

- Team consensus should be reached whenever possible
- In rare instances, the team lead may need to make a judgment call to meet deadlines
- This should happen infrequently and will be communicated to the author(s), including an explanation of why it was necessary

For multi-author documents:

- Responsibilities for completing reviews should be decided before the review process begins
- Default responsibility falls to the writer who:
    - Composed the majority of the document, and/or
    - Was assigned the task

Iterating and revisiting published documents

Sometimes, due to evolving information or tight deadlines, we decide to publish a minimally viable product and return to it later to polish, update, or otherwise improve it.

Benefits of this approach:

- Preserves forward momentum
- Allows documents to be revisited as needed to maintain quality and accuracy
- Provides a temporary resolution to ongoing disagreements if there's an approaching deadline

Best practices when publishing an MVP:

If you need to publish a minimally viable product and have identified areas that should be added or updated:

1. Create tickets for those future updates to ensure they don't get lost
2. Document this decision on the original ticket
3. Link the ticket(s) containing the future changes

Ticketing out review work

Proper ticket management ensures review work is tracked, prioritized, and completed efficiently.

Automated subtask creation:

Many project management systems can automatically create a subtask for a ticket when it moves to "In review."

When to use the review subtask:

- **Small scope reviews:** Can be moved to "Done" without further documentation
  - Examples: Quick gut checks, scanning for grammatical errors in short documents
- **Larger reviews:** Use the automatically created subtask to track the review process

For multiple reviewers:

- Duplicate the subtask for each reviewer
- Tag each reviewer in their respective ticket
- Assign story points to review tickets when needed (typically one point depending on scope)
- Include any specifics you want a reviewer to look at or focus on in the subtask description

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Completing the review process

General principles:

We defer to processes found in typical Git workflows for any process not addressed in this document.

Review completion criteria:

- All tagged reviewers should respond before a review is considered complete, even if just to sign off or defer to another reviewer
- At least one review and approval is required for a document to advance to "Done" and be ready for publication
- Every document must be reviewed and approved by at least one senior team member

Exceptions for urgent publications:

- If a document must be published urgently, review requirements should not delay the process
- Reviews and changes to the document can be iterative and conducted after publication as retro-reviews
- Reviews from subject matter experts (SMEs) are valuable for content feedback, but a review from a senior team member is still required after SME approval

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Summary

Effective documentation review requires:

- **Structured process:** Follow the big-to-small approach to maximize efficiency
- **Clear communication:** Be specific, actionable, and respectful in feedback
- **Respect for ownership:** Authors have final say, with senior review required
- **Flexibility:** Balance quality with deadlines through iterative improvements
- **Proper tracking:** Use tickets to ensure review work is documented and followed through

By following these standards, teams can maintain high-quality documentation while fostering collaborative, respectful working relationships.