



September, 2025

Pre-Edit Vision Worksheet

Clarify your goals, audience, and voice before hiring an editor

A companion to *“How to Clarify Your Vision Before Hiring an Editor”*

Why this worksheet matters

Taking five to ten focused minutes to define your editing goals will save time, money, and confusion later. Whether you're preparing a book, article, report, proposal, or webpage, the prompts below will help you gather the insight your editor needs to scope the work and align with your purpose.

You don't need perfect answers—just honest ones.

1. Project Snapshot

Working title or short description:

Type of document (book, article, report, etc.):

Approximate word count:

Deadline or target date (if applicable):

2. Define Success

In one sentence, what does success look like for this project?

Examples:

“I want this article accepted by Journal X on first submission.”

“This white paper should be ready to send to clients by Nov 30.”

“I need this proposal to feel persuasive, polished, and aligned with our brand voice.”

Write your goal below:



September, 2025

3. Know Your Audience

Primary readers: (check all that apply)

- ☐ General public
- ☐ Academic reviewers
- ☐ Executives or decision-makers
- ☐ Internal staff or colleagues
- ☐ Clients or prospects
- ☐ Other: _____

Their familiarity with the topic:

- ☐ Experts
- ☐ Mixed-level
- ☐ Newcomers

What do they need from this document?

- ☐ To learn
- ☐ To approve or adopt something
- ☐ To be persuaded
- ☐ To skim and extract key info
- ☐ To take action
- ☐ Other: _____

Describe your audience in 1–2 lines:

4. Voice & Tone Preferences

What tone or style are you aiming for? (check all that apply)

- ☐ Confident
- ☐ Accessible
- ☐ Formal



September, 2025

- ☐ Conversational
- ☐ Persuasive
- ☐ Cautious
- ☐ Friendly
- ☐ Technical
- ☐ Other: _____

Are there tone pitfalls to avoid? (e.g., “don’t sound salesy,” “avoid jargon,” etc.)

5. Where Are You in the Process?

Stage of draft:

- ☐ Idea stage
- ☐ Rough first draft
- ☐ Stable second or third draft
- ☐ Final version—ready for polish
- ☐ Ready for layout/formatting check

How open are you to changes?

- ☐ Open to structure suggestions
- ☐ Open to language/tone feedback
- ☐ Only want surface-level corrections
- ☐ Just need a final proofread
- ☐ Not sure—need guidance

6. Priorities and Editing Focus

Top 3 priorities for this edit (rank them):

- ☐ Structure / organization
- ☐ Flow / transitions
- ☐ Sentence clarity
- ☐ Tone / voice alignment
- ☐ Grammar / punctuation
- ☐ Style guide consistency (e.g., APA, Chicago)
- ☐ Fact-checking / accuracy
- ☐ Jargon reduction / accessibility



September, 2025

☐ Readability for general audience

☐ Other: _____

1. _____

2. _____

3. _____

7. Supporting Materials

Will you provide...

- A 1–2 page sample? ☐ Yes ☐ Not yet
- A style guide or brand voice sheet? ☐ Yes ☐ No
- Past feedback you've received on this project? ☐ Yes ☐ No
- Reference documents or examples you like? ☐ Yes ☐ No

8. Optional: Questions for Your Editor

Is there anything you want to ask or clarify before starting?

Done! What's Next?

Now that you've clarified your vision:

- Share this worksheet with your editor (or copy your answers into an email or intake form)
- Attach a representative sample if you're asking for a quote.
- Use your answers to stay focused and grounded as your project moves forward.

Because the best edits begin with clarity.