

# **Best of Pencil Points**

## **Volume 2**

*With updated commentary*

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In October 2009 we began publishing a monthly newsletter to share our ideas and experiences in freelance medical writing with people who wanted to become—or become more—successful. We’ve now published more than 100 issues of *Pencil Points*, and that’s a lot of issues for people to review. So, to make it easier, we now hand select articles, update them with additional commentary, and publish them in our *Best of Pencil Points* ebooks.

In [Best of Pencil Points, Volume 1](#), we gathered the best and most popular articles from the first year of *Pencil Points*, from Issue #1, published in October 2009, through Issue #12, published in September 2010. In *Best of Pencil Points #2*, we’ve reprinted articles from the second year of *Pencil Points*, from Issue #13, published in October 2010, through Issue #24, published in September 2011.

Just like our newsletter, this ebook is divided into 4 main sections:

- **Just for Newbies**—Information and Inspiration for Writers New to the Business (with Issue #27, we renamed this section [Not] Just for Newbies because we discovered it has also been very popular with experienced freelancers)
- **On the Radar**—Resources for Medical Writers, one of our most popular sections
- **Dollars & Sense**—Advice on the Business of Freelancing, which is of great benefit to entrepreneurs in all types of freelance businesses
- **The Savvy Marketer**—Marketing Tips to Build Your Business, which is also of great benefit to entrepreneurs beyond those in the medical communications field

We’ve enhanced the articles originally published in the newsletter by updating them with new information and additional insights we’ve picked up along the way since then. Look for **Authors’ Updates** and **Business Tidbits** to point you to updated information.

We hope you enjoy the *Best of Pencil Points, Volume 2*, that you find it helpful, and that it informs and inspires you to become successful —or more successful—in your freelance business.

Wishing you writing success,

Cyndy and Brian

# About Us

We both started out unqualified to do what we do today for a living. We came to the same career from very different experiences, educations, expectations, and needs. Today, we are both successful freelance medical writers.

Cyndy was a health care professional who never planned on becoming a writer. Brian was a writer who never planned on entering the health care profession. We created *The Accidental Medical Writer* series for everyone who is frustrated with working for someone else. For everyone who wants the freedom and security that freelance medical writing can help them achieve. We created this series to tell you how we became successful, so you can gain the confidence and skills to become successful, too.

[Not] JUST FOR NEWBIES  
Information and Inspiration for New and  
Experienced Freelances

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## Add Punch to Your Portfolio Writing Patient-Education Materials

One of the first steps you'll need to take as a novice medical writer is to determine the type of content you want to write. That might be regulatory writing (which we discussed in last month's *Pencil Points*), promotional content, or educational pieces. Target audiences of educational content can be professionals or consumers. If you're used to writing for scientific audiences, shifting your focus to writing patient-education materials for consumers can be tough. But it can also be just as rewarding!

A necessary skill when writing patient-education materials is to use simple language and avoid the jargon. Here are some tips on how to write simple, easy-to-read content consumers will understand the first time they read it:

- Start by asking your client to identify the target audience and the learning objective or overarching purpose of the particular document you are creating.
- It's also a good idea to inquire about the literacy level of the audience. Low-literacy audiences have very different needs from the general consumer audience.
- Develop a short title for the piece that explains the content. For example, "How to Use an EpiPen®."
- Separate ideas in text using headings and subheadings.
- Express only one key point or message in each paragraph.
- Write sentences and paragraphs that are short and to the point.
- Use active voice rather than passive. Write, "Plunge the EpiPen into your thigh," not "The EpiPen will be pushed into your thigh."
- Don't be wordy. Include only information that is relevant to the purpose of the document. In our EpiPen example, you wouldn't include an explanation about how allergies develop or list common allergens.
- Keep the piece jargon-free by using common terms rather than technical ones. In our example, instead of anaphylaxis, say severe allergic reaction.

- Use graphics and pictures to illustrate more complex concepts.

When you're finished with the first draft, assess the reading level. If you work in Microsoft® Word®, you can check the reading level when you perform a grammar and spelling check. First, click on "spelling & grammar," then click on "options." In the Options window, check "Show readability statistics" then click "OK." The Flesch-Kincaid reading level appears after the spell-check is complete. For general consumers, shoot for about a 7<sup>th</sup>-grade reading level.

**AUTHORS' UPDATE:** We're using a much more advanced version of Word than when we originally wrote this article, and you probably are, too. (We're currently using Word 2013 and we're about to upgrade to Microsoft Office 365). The process of checking the reading level of text in a document has changed in these newer editions. Now, before you can check readability you have to enable Word to check the reading level. In Word 2013, click the File tab, selection Options, then click Proofing from the options on the left side of the window. Scroll to "When Correcting Spelling and Grammar in Word" and check the box for "Show readability statistics." Now, after you check spelling and grammar, when you close the spelling and grammar window a window will appear with readability statistics.

If you want to learn more about creating clear communications about healthcare and medicine for the public, check out publications by Steven Woloshin, MD, MS, and Lisa Schwartz, MD, MS, Co-directors of the Medicine in the Media Programs at the Dartmouth Institute.

# ON THE RADAR

## Resources for Medical Writers

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## Skip the Jargon

The primary purpose of patient-education materials is to improve patients' health literacy so they can make informed decisions about their health care. Unfortunately, consumers often can't understand and communicate health information. One way to improve health literacy is to write in plain language. Here's a great website filled with plain language resources to help improve your ability to write in an easy-to-understand manner.

***BUSINESS TIDBIT:** Do you have a clinical background? Can you communicate complex medical or healthcare information to consumers? If so, highlight that experience in your marketing efforts. With the constant changes occurring in the health insurance industry, there is an ever-growing need to create clear communications to help consumers make informed healthcare decisions. If you know how to do that, your skills will be in demand.*

When you love what you do for a living like we do, you never have to work a day in your life. But that doesn't mean we like to spend every waking minute of every day doing medical writing. Sure, we do what we have to do when we have to do it. And sometimes that means working evenings and/or weekends to meet our deadlines. But there needs to be a balance. Working in the medical communications field can be pretty stressful, so every now and then we need to take a chill pill!

Scroll through the [Plain Language website](#) and check out the humorous examples that illustrate plain language principles. You'll also find the CDC's Plain Language Thesaurus and a list of plain language alternatives for common medical terms compiled by editor Sharon Nancekivell. This site is filled with other resources as well, so take some time to explore it.

**AUTHORS' UPDATE:** Since we first shared this resource in October 2010, the website has been

updated many times. Click on the Tips & Tools tab to find reference tips, word suggestions, dictionaries, thesauruses, style guides, and much more. Read about the free, half-day plain language and writing for the web training classes that are available for all federal agencies.

# DOLLARS & SENSE

## Advice on the Business of Freelancing

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## Clear Estimates Make For Happy Clients and a Better Bottom Line

In August we unveiled a new [Freelance Estimating Checklist](#) to help you get a handle on one of the greatest business challenges we freelancers face, developing complete and accurate project estimates. Hopefully you've taken the first step and started using this tool.

This month we want to help you improve your estimating success by providing a few tips on how to clearly communicate the estimate you've developed to your client.

### Tip #1: Clearly identify what's included in your estimate

- Teleconferences and/or on-site meetings
- Literature searches, procuring references
- Reviewing supplied and/or procured references and other resources (if unique, you may even want to itemize what some of those references/resources are)
- Outlines (specify how detailed, and whether or not annotated)
- First drafts (whether the deliverable is a journal article, patient education brochure, CME slide deck, website, sales training module, or whatever, describe in detail its size and scope [eg, number of pages, words, screens or slides, plus any other relevant characteristics])
- Revision drafts (include each revision draft as a separate line item so if the project gets delayed, you can invoice for the first draft and/or each revision draft as completed)
- Any other deliverables or characteristics of the project that may be your responsibility (eg, identifying/recruiting authors or faculty, writing submission letters, reviewing page proofs)

### Tip #2: Clearly identify what's NOT included in your estimate

- Out-of-pocket expenses for reference procurement (let the client know these costs, if incurred, will be passed through at cost)

- Additional (or any) revision drafts (add a statement that estimates for revision drafts, or additional revision drafts, will be gladly provided as needed)
- If the client promises to provide all references, state that all references are to be supplied and that the estimate does not include literature searches
- Any other responsibilities the client has agreed to handle should be specified in your estimate as being handled by the client

### **Tip #3: Clearly stipulate a payment schedule**

- Advance payment-you're not likely to get an advance payment before you begin, although in certain circumstances and with certain clients you may want to insist
- Advance invoicing-many clients are currently taking 45 to 60 days and longer to pay, so especially on large projects you may want to invoice a percentage at the start of the project so you have cash flow the following month
- Progress invoicing-also for larger projects, break invoicing into smaller chunks so you can maintain cash flow throughout the period of time you're working (but make sure you are 100% invoiced for the estimated cost of the first draft by the time you complete and deliver the first draft)
- Revision invoicing-stipulate that estimated costs for each revision draft will be invoiced separately upon completion, this way you're not hung if the project gets delayed

### **Tip #4: Update your estimate with every scope change**

- By clearly stating in your estimate what is, and what is not, included, you have a solid case for scope changes
- Update your estimate with every scope change so nothing falls through the cracks, and to prevent memory lapses that will likely favor your client and not your bottom line

The bottom line is that when your estimate is clear and complete, your invoice will look just like your estimate, and clients love to pay invoices that have no surprises! They also love the freelancers who send them.

**AUTHORS' UPDATE:** New freelances are always joining the ranks and experienced freelances are always looking for ways to increase their income by abandoning hourly pricing for the many advantages of project pricing. For this reason, we still offer our Freelance Estimating Checklist to anyone who subscribes to *Pencil Points*. And as a thank-you to buyers of our *Best of Pencil Points* ebooks, here's a link where you can download our [Freelance Estimating Checklist](#) for your personal use.

# THE SAVVY MARKETER

## Marketing Tips to Build Your Business

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## Don't Tread on Me!

Medical communications companies, medical education companies, and medical advertising agencies invest years, and often tens if not hundreds of thousands of dollars, establishing and nurturing relationships with their clients. So it stands to reason these companies will go to great lengths to protect their investments. If you ever work on staff for one of these companies, you'll be expected to sign a noncompete agreement that will prevent you from undermining the company's business by going to work for yourself or for a direct competitor and taking with you one or more of the company's clients.

As a freelance, it certainly wouldn't be in your best interest to damage your client's business. One of the main reasons we love working for these types of clients is that each one can bring a number of different clients of their own, some with several different products that we can be working on, right to our door. Talk about leverage! The potential for business from one medical communications company alone can be exponential. But from a legal standpoint, our clients still need to protect themselves from the freelance who might go rogue. That's why they usually expect us to sign a noncompete agreement, too.

We have no trouble signing noncompete agreements that assure our clients we will not steal their clients or employees, help anyone else steal their clients or employees, or use any proprietary information gained from our working relationship against them or in the interest of anyone else. But we've encountered a few noncompete agreements that go far beyond this understandable protection and actually seek to restrict our ability to work. When a good noncompete agreement goes bad, it's called restriction of trade.

We had a contract come across our desks once that asked us to agree that for a period of one year after our contract expired we would not solicit, accept, or undertake either directly or indirectly the performance of any services for any competitor of our client, whether working as a consultant, employee, agent, or in any other capacity where our services would be considered competitive with the services provided by our client. To agree to this would mean that after the contract is over, we'd have to get a job at McDonalds! Our response to that, in the spirit of independence symbolized by the famous Gadsden flag--*Don't tread on me!*

Needless to say, we didn't agree to the contract. But instead of striking the offensive paragraph and sending it back to the client, we called her and explained our concern. She understood

completely and apologized for the "boilerplate" language that had been picked up without change from the employee contract. The client subsequently revised the noncompete agreement to exclude the paragraph, we signed it, and the client has since become one of our favorites!

What we learned from this experience is that you have to read every noncompete agreement carefully, critically, and without distraction. These documents are often written by lawyers using complicated language and sentence structures that can make it easy to miss or misunderstand the implications of what is written. We also learned that boilerplate from one type of contract can easily turn up inappropriately in other types of contracts simply because the person creating the contracts isn't able to appreciate the nuances. Instead of taking offense that the client is trying to pull something over on us, we can take the high road and educate our client by pointing out the problem and offering a solution. Finally, we learned once again that if something concerns us, call the client. Communication is the glue that cements strong working relationships, and clients appreciate when we take the time to demonstrate our expertise as communicators by resolving, rather than removing ourselves from, these business challenges.

Now that's marketing!

**AUTHORS' UPDATE:** This article was relevant when we published it in January 2011 and it remains relevant today. We will always be advocates for contracts that benefit both the client and the writer. We never sign contracts without reading them carefully, and you shouldn't either. If you find a contract clause that doesn't work for you, contact your client immediately to discuss your concerns. Don't simply sign the contract because you are afraid of losing the work. Think about it. Do you really want to work for a company that tries to limit your business opportunities? We don't. But also, don't simply send a contract back to your client with major changes they're legal department might have a real problem with. Communication is the key to making sure your concerns are understood and addressed.

## Did You Like What You Just Read?

In our opinion, medical writing is the best profession for anyone who loves to write. And being a freelance medical writer is the best way to achieve your personal, professional, and financial goals! No career gives you more personal flexibility and professional challenge, plus the potential to earn more money than any staff job will ever pay you.

Freelance medical writers come from all walks of life. We're scientists and medical researchers, journalism and communications majors. We hold degrees from basic BAs to PhDs and advanced medical degrees. We all have one thing in common: we came to be medical writers accidentally.

*The Accidental Medical Writer* gives you the insights, information, and inspiration you need to become a successful freelance medical writer. Our [books](#), [free monthly newsletter](#), articles, seminars, and workshops are filled with helpful tools and will give you confidence—whether you're a seasoned professional or just getting started.

*Pencil Points* is our free monthly newsletter. If you liked what you just read, head to our [sign-up page](#) to subscribe. Each issue is filled with:

- Tips for newbies and not-so newbies
- Resources for medical writers
- Advice on the business of freelancing
- Insights to market your business
- Plus plenty of helpful links

And check out our other books:

- [The Accidental Medical Writer](#)
- [Nude Mice and Other Important Medical Terms You Need to Know](#)
- [ORG Directory](#)
- [Best of Pencil Points, Volume 1](#)

# TURN YOUR UNQUALIFICATIONS INTO A SUCCESSFUL CAREER!

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***“I wish *The Accidental Medical Writer* was around when I was getting started in freelance medical writing!”***

*“This book reads like a personal conversation with two seasoned professionals who are coaching the reader through the ups and downs, ins and outs, of starting a freelance medical writing career.”*

**—Marian Burk Wood, Author, *Marketing Plan Handbook***

*“If you ever wondered if you could be a freelance medical writer, read this book by Brian and Cyndy.”*

**—Jose Robertson, Former President, Sun MedCom**

*“The *Accidental Medical Writer* is engaging and inspirational. It will be a great help to any new or aspiring freelance medical writer.”*

**—Lori De Milto, Writer for Rent, LLC**

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# EXPOSE YOURSELF TO THE LANGUAGE OF MEDICINE!

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***“This book must be on your bookshelf!”***

*“Nude Mice is an invaluable reference that assembles the sort of everyday useful information that all medical writers need into one accessible source.”*

**—Joseph E. Melton, PhD**

*“...a comprehensive resource for both the novice and the pro. Cyndy has done a great job of demystifying even the scariest of medical jargon.”*

**—Lisa P. Breck, President, Breck & Company, Inc.**

*“Who would have thought that a book on the use of medical terms would be so entertaining that you’d read it even when you didn’t have a question. I found myself paging through Nude Mice just for the fun of it!”*

**—Louise Rozik, Rozik Communications, Inc.**

*Available in Paperback and eBook at*  
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*Read a FREE excerpt at*  
[http://www.theaccidentalmedicalwriter.com/wp-content/uploads/2013/10/Nude\\_Mice\\_Excerpt\\_10.09.pdf](http://www.theaccidentalmedicalwriter.com/wp-content/uploads/2013/10/Nude_Mice_Excerpt_10.09.pdf)

# THE ORG DIRECTORY

## FROM

# THE ACCIDENTAL MEDICAL WRITER

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***“The ORG Directory from The Accidental Medical Writer may be the most complete and comprehensive directory of its kind!”***

Comprising 5 separate directories, the ORG Directory includes more than 800 listings of medical, nursing, dental, allied health, and alternative medicine specialty organizations. Use the directory to decipher acronyms, assist you in your work, and expand your client base.

The ORG Directory is an ebook, so it's searchable, and every single listing has a link to that organization's website.

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*Read a FREE excerpt at*

<http://www.theaccidentalmedicalwriter.com/wp-content/uploads/2013/10/docORG-Excerpt-1.13.pdf>

## Read what people are saying about *Best of Pencil Points Volume 1!*

*“Are you a medical writer looking for a solid resource that will help your freelance business? The Best of Pencil Points #1 is just that! Since 2009, Cyndy and Brian have been sharing tips and proven strategies with us through their monthly newsletter, Pencil Points. The Best of Pencil Points #1 is a terrific collection of their best and most popular articles, along with current industry updates and business advice.”*

—**Jennifer Minarcik, MS, Freelance Science and Medical Writer**

*"I've been freelancing for 25 years, so I was surprised and humbled at first at the number of truly practical suggestions I was finding in Pencil Points. Then I just accepted it and began looking forward to every issue. The nice thing about 'Best Of' is that Brian and Cyndy have compiled their suggestions into an almost step-by-step guide for freelancers, so you can start out with best practices that would have taken you years of trial and error to learn."*

—**Udi Shorr**

*“Brian Bass and Cyndy Kryder stumbled into medical writing and never looked back. For years, they’ve been compiling tidbits of tremendously practical information and dispensing it to those of us lucky enough to be on their mailing lists.*

*Now, they’re sharing the “best of...” with everyone. From the reasons why writers should self-edit, to how to find new clients, to the pros/cons of project pricing vs. per-hour pricing, to useful resources for all medical writers, or how to analyze whether a particular client is worthwhile keeping, Brian and Cyndy have created a simple tome that no medical writer should be without.*

*Throughout this Best of volume, Brian and Cyndy show their passion for writing, for medical publishing, and their love of communication. This is one volume I’ll keep in my office for quick referencing...and you should, too.”*

—**Michelle Dalton, ELS**