



MEDIA**LOCATE**

# Client Review Checklist

Is your review process  
seamless and repeatable?

## CLIENT REVIEW CHECKLIST

This checklist is intended to take the guesswork out of the translation review process and to make the review process as smooth, seamless, and repeatable as possible.

The steps outlined below may not all apply to your particular projects, so we advise using it as a starting point and then modifying it to best suit your needs.

This guide is organized into the following 3 sections:

1. **Glossary**: A list of the terms that are commonly used in the localization industry for the different stages of the translation review process, as well as a few terms that you might not find elsewhere. These additional terms, plus their definitions, can come in handy for you as a means to determine the efficacy of your overall translation review process.
2. **Process checklist**: This checklist can help you define your translation review process and can be of help to you in planning your overall review program. It is a good idea to go over the items in this checklist with other members of your localization team, your vendor, any internal reviewers, your project stakeholders (i.e., product, marketing, legal, etc.) and upper management.
3. **Project checklist**: This is more of a tactical checklist to ensure that your projects are on track. You can use this checklist each time you are doing translation review as part of a localization effort, and it is also helpful for the different people involved in the process to have access to this checklist, as they can sign-off on their individual deliverables and can help keep the project on track. You can also use the Project Checklist as a basis for a post-mortem, should you choose to conduct one.

## Translation Review Checklist **Glossary**

1. **Content Profiling:** Not all content types have the same business value. Legal, product labels, user interface (UI), and medical texts generally require higher levels of quality assurance as they undergo more scrutiny by customers as well as regulatory bodies and are therefore higher risk and higher value.
  - a. **Content type approved for review:** Make sure that the content is actually approved for the review process. In general, if you are translating Help or user/customer support communications, your company may decide that the content is subject to a lower level of scrutiny than the UI text.
  - b. **Review metrics approved for content type:** Once you have established that your content should go through review, it is a good idea to establish what constitutes a "customer-ready" quality level. Legal and medical texts may need to go through different levels of sign-off and have different levels of linguistic and technical quality.
  - c. **Sign-off on NO preferential changes:** While promotional copy such as marketing brochures, press releases, slogans, and other highly stylized content that conveys the brand image of the company needs careful massaging and wordsmithing, most texts that undergo client translation review do not need to be evaluated in terms of style. For promotional and branding-related content we recommend a process called *Transcreation*. For all other content, we strongly recommend having all parties in your review process sign-off on there being **zero preferential or stylistic changes** suggested or made by the reviewers, as doing so can cause delays to the schedule and inconsistencies with other content that is being translated.
2. **Project Plan/Schedule:** It is imperative that all parties in the review process agree, understand, and sign-off on the overall project plan as well as their individual delivery deadlines.
3. **Reviewers:** The linchpin of any review process is the selection, quality, and consistency of the client reviewers. Without this step in place, the chance of the client process being successful is greatly compromised.
  - a. **Source reviewers approved:** Reviewing the source text for both linguistic and technical/factual accuracy is an often overlooked step in the overall review process. Make sure that you have a solid reviewer or review team for all of your source texts

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to ensure that the translators are as successful as possible in producing an accurate translation before starting on the review.

### Two additional comments about source review:

- i. If the source text is very “hip” or regionally specific and filled with cultural nuances and slang, then it might be difficult for translators to be able to read between the lines. It is a good idea for your source reviewers to add comments, or even to provide a “plain” version of the source text as reference to help the translators understand exactly what they are translating.
  - ii. It is important to set expectations for the Language Services Provider (LSP): Depending on the style and quality of the source text, the target market may, in fact, be a different demographic than the domestic one. There are cases, for example, where a brand or product may be considered “simple” or “basic” in one market, but is sold as a luxury brand in other markets, even though the source text is the same.
- b. Technical qualifications approved:** Your reviewers need to demonstrate that they are subject matter experts in the content as well as the product and technical data described in the content.
- c. Language qualifications approved:** Reviewers must always be native speakers of the target language and possess excellent skills in the source language. “Native speakers” can mean different things to different people and here are two main points to keep in mind:
- i. They should reside in their country and be natively fluent in the specific language that is being reviewed.
  - ii. They must have excellent writing skills in their native language and understand the latest linguistic conventions.
- d. Review responsibilities documented and approved:** All parties in the process need to sign-off that they understand their responsibilities; this step is imperative for all client-side reviewers and includes sign-off on the process, project details, and schedule. The reviewers also need to ensure that they understand the goal of the review process itself: unless otherwise instructed, they should only read the text for translation and technical accuracy, correct and consistent terminology, and put in simple terms, **only fix what is really broken**. Please see section 1. c: “**Sign-off on NO preferential changes**” for more details.

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- e. **Dedicated to review:** While not all companies that do client review have full-time dedicated reviewers, they should, at a minimum, provide a job description and ensure that sufficient time is allotted for each reviewer to complete their work as per the project requirements.
- f. **Review pilot completed, documented, and certification earned:** Testing out the review team with a pilot project can go a long way towards ensuring that all steps are clearly understood and that there are no gaps in the process. While it may seem like a stretch goal for some, the more institutionalized the review job and process is, the greater the chance of success. Establishing a Translation Review Certification is the best way to ensure that the people doing the review are qualified, empowered and have a stake in the overall quality of the company's communications.

We added the steps below as options for clients to consider outside of the "standard" client translation review process. For the same reason, they are not included in either of the checklists below.

- g. **Let your users be the judge!** An additional step that clients can take is allowing end-users to grade translations on the client's website or within their localized app or platform. Adding a way for end-users to provide translation feedback can let you know right away if your translations are effective. In many cases, a client reviewer that is involved in the product on a daily basis may feel very strongly about his or her preferences and waste a lot of time reviewing translations when users would be perfectly happy with the initial work from the translators. Having your customers weigh in on the translation quality can save you time and money, as well as drive a deeper and more direct level of engagement with your customers, by showing them that you care about them and that you are loyal to improving their experience on your site or app.

There are a number of ways for clients to track customer feedback and promote customer loyalty. None of these specifically cover translation quality, but they do cover product quality, easy-of-use, usefulness, and overall user experience. Net Promoter (<http://www.netpromoter.com>) scores, global Customer Satisfaction (<http://www.theacsi.org/products-and-services/international/global-csi>) indexes, and "Was this page useful?" surveys can all lead to greater customer interaction, faster problem resolution, increased customer and brand loyalty, and, as a result, better overall product (and, indirectly, translation) quality.

There are three more options available for companies to elicit end-user feedback, and all of them can produce some very helpful translation quality feedback, as well:

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1. Early-stage terminology crowdsourcing: Some companies in the social media space or with an established and trusted user community ask their international communities what they would call a new feature in their language, rather than using more "standard" dictionary definitions or asking their LSP translators to come up with the terms. It is a good idea to include the LSP in this step as they can weigh in on any potential consistency or linguistic issues as well as help moderate the feedback.
2. Bucket testing (also known as A/B testing): There are a number of very savvy technology companies that will test out two versions of a web page to see which version garners more hits and positive feedback. Translation buyers can integrate this type of testing into their translation review round to see which translations resonate more with their end users. It is a good idea to include your LSP linguists in this round as well, since they will be seeing their work in the live context of the application and can also provide some helpful feedback.
3. Beta testing: Allowing your users an early look at your new product, feature set, website, or other new release can help you vet the quality of your translations as well as the impact of your product itself. Granting your translators this same level of access is recommended, for the same reasons.

**4. Linguistic assets: Translation memories (TMs), termbases and glossaries are all essential elements in the translation and review process.** Your language services provider uses and manages these linguistic assets to help achieve efficiencies, save you money, and provide consistency across all of your content types. These linguistic assets need to be made available to everyone in the review process.

**5. Review platform:** This is a key element in the review and communications process, as the tools used for the review itself need to be intuitive and readily available to everyone involved in the process. We have outlined the main steps to consider when selecting a review platform.

- a. The client and LSP need to agree in advance on what platform is going to be used for the reviews. It should be done in a way that helps the reviewers do their job quickly and efficiently while allowing fast or real-time implementation of their changes and suggestions.
- b. Training: If the review platform is hosted on the LSP side, then the LSP's project managers will need to train the reviewers on how to use it. If the review platform is hosted on the client's side, then both the client and the LSP need to agree on what the process should be and the client needs to allow for easy and reliable access to the platform, as well as any needed training for LSP-side project team members. Client-side review platforms should have a way for reviewers to update the TM directly or a means to send the reviewed translations to the LSP's TM system.
- c. Automatic review step integrated in the workflow: If your LSP owns a translation

management system (TMS), chances are, your reviewers will be able to perform their reviews within the system, and the translation memory will capture their changes immediately. No need to send files back and forth and make comments on the file level so that someone else has to implement them.

- d. Integrated quality assurance (QA) model: The more sophisticated the TMS, the more likely that it has a robust quality assurance module built in. Integrated QA models can allow reviewers to flag the types of issues they find and make comments for the linguists that have worked on the project. Once they are done with their work, the system will automatically move on to the next step so the professional linguists can review the client reviewers' changes for reference purposes and to make sure the project is completed error-free.
- e. Review off-line/outside the system: The reviewers can work on the translation files directly and use the commenting tools that are available depending on the file format (Word, PDF) to track their changes and allow the LSP to review them, update the files with their changes and also update the translation memories to make sure the LSP captures the client's preferences. For file formats that do not have commenting or tracking features built-in, the LSP should be able to help by either providing an offline review tool or a way to convert the files into a format that is more convenient for the review process.
- f. Make comments and changes clear: The clearer the comments on the files are, the faster and cleaner will be the process of updating the files with the client's preferences.

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Translation Review <b>Process</b> Checklist					
<b>1. Content Profiling</b>					
Step	Notes	Status			
a. Review metrics approved for content type					N/A
b. Sign-off on NO preferential changes					
c. Content profiling for all translatable content					
<b>2. Reviewers</b>					
Step	Notes	Status			
a. Source reviewers approved					
b. Technical qualifications approved					
c. Language qualifications approved					
d. Review responsibilities documented and approved					
e. Dedicated to review					
f. Review pilot completed, documented, and certification earned					
<b>3. Review Platform</b>					
Step	Notes	Status			
a. Compatible file format and versioning					
b. Reviewing tools available and intuitive to use					
c. Progress tracking supported					
d. Communications tracking supported					

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Translation Review <b>Project</b> Checklist						
<b>1. Content Profiling</b>						
Step	Notes	Status				
Content type approved for review					N/A	
<b>2. Project Plan and Schedule</b>						
Step	Notes	Status				
Source/Localizability review schedule approved and understood						
Translation schedule approved and signed off						
Review schedule approved and signed off						
Final deadline approved and signed off						
<b>3. Linguistic Assets</b>						
Step	Notes	Status				
Glossaries updated, approved, available						
Style guide updated, approved, available						
TMs updated, available, searchable						
Product/Project information updated and available						
<b>4. Review Platform</b>						
Step	Notes	Status				
Platform ready						



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