

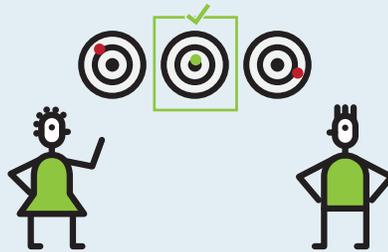
Instructions that Add Value

Instructional guides are an important—yet often overlooked—communication for shaping customer experience. Clearly written, well-designed instructional communications can not only teach, but also enhance your customers' perception of your brand, product, or service. To improve your next instructional effort, keep these four ideas in mind.

1 Establish your primary purpose (and use it to keep yourself honest).

You know you need to instruct your audience, but what is the real purpose of your communication? To improve the customer experience by eliminating errors?

To provide details about your product that only experts know? To aid customers in selection or ordering? To make a complex process feel simpler?



Start by defining your purpose for your users and your organization. Keep it in mind and go back to it every time you need to make a significant decision in your instructions or guide. Once your purpose is defined, focus on identifying, developing, and organizing content to best support it. Your purpose can also help you determine which ideas to include and which to keep out.

Tip: If you're having trouble getting your team to decide on a primary purpose, try a "Mad-Libs" style sentence building exercise: "This guide should help[who] do [what] so that [goal]."

2 Be courteous and user-centered.

Good communications (especially instructions) take into consideration the various points of view, backgrounds, and human factors of your audience.

Are your readers experts or novices? Where are they from? Do they need background context? How often will they use your communication? On what type of device? Do they have time, schedule, and environmental constraints?

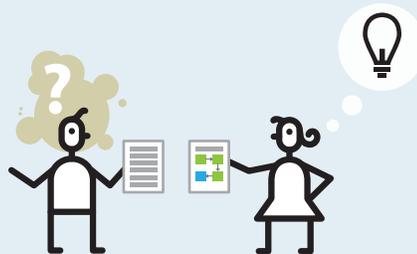


Use the information you know about your audience as you create your instructions. Each communication is different, but here are a few tips to make your instructions more courteous and user-centered:

- Help users avoid missteps, frustrations, or issues.
- Be aware of shifts in measurement, language, and reading direction that could impede understanding.
- Consider first-time and repeat use in your form factor, organization, and navigation decisions.
- Define the right level of detail and pace.

3 Make it visual—in the right way.

Visuals can add interest and present ideas in ways that make them easier to grasp than text alone. However, just because an idea is visual doesn't mean it's clear. Are you accommodating visual skimmers? Do you show the necessary environmental context, relationships, and reference to scale? Do your illustrations clearly articulate the right action or step? Are symbols used consistently and do they convey their meaning clearly?



Focus on what your content is really about and how to share that meaning with your users in the most vivid, understandable, on-brand, and efficient way possible. Here are a few ideas for elevating the impact of your visuals:

- Crop and scale photos and illustrations consistently. If you shift scale, alert the user.
- Use a standard mechanism to call attention to key actions or timing—for example, icons, graphics, sound, animation, or color. Avoid using visuals simply for aesthetic purposes.
- Use line weights, tones, and patterns to set up a visual hierarchy, reveal context, and aid skimming.

4 Test and Refine.

Testing will help you identify problems or potential opportunities and see how "the curse of knowledge" might be impacting your guide. Are there alternative approaches that might make sense? Do you describe steps in the right order? Is any content irrelevant to users? Are there physical usability concerns? Are there pitfalls in your assumptions?



Depending on how high-stakes your instructions are—and how easy it is to get in touch with your users or proxies—the level of testing you do will vary. While formal testing may be appropriate in some cases, here are some low-lift ways to test your instructions:

- Pre-test your approach. Before your first draft, create a design brief and share it with your team to gut-check planned ideas or topics, assumptions, organization, production, etc.
- Have a colleague, friend, or relative from another part of the world review your draft to uncover regional biases.
- Test alternate visualization styles for just one section, such as using detailed illustrations vs. icons or text vs. photographs.

If you want to learn more about how to improve how you guide and instruct your audiences, get in touch at www.thoughtform.com or 412.488.8600.