Results of Student Brainstorming - An Ongoing Exercise

Effective Descriptions:

- Start with an analysis of the audience, including cultural considerations, age and qualifications (required skill level) of user
- Offer a broad overview, possibly with a word picture to help the reader to understand
- Can describe a product, process, idea, place, or component
- Have a clear user, purpose and place (who, why and where)
- Can include similarities and differences (compare & contrast, analogies)
- Start with a two-part title (ex., Description: Name of Item)
- Are of interest to the reader
- Include graphics with titles, captions and sources
- Use an outline (if online, use these as links)
- Use subsections with subheads to help the scanning reader
- Use color, BF, italics, underlines to emphasize ideas
- Use vivid, sensory language that creates a word picture
- Write in sentences vs. phrases; paragraphs are OK
- Are objective in choice and description of details
- Start with an Introduction*
    - attention-getter if appropriate
    - name of the item/idea/process (pronunciation if necessary)
    - definition with antonyms and synonyms
    - intended audience (user) and value/benefit to the audience
    - keywords
    - thesis/objective
    - overview, possibly with table of contents
    - legal information
    - purpose or function of object/idea
    - location
    - origin/history/inventor
    - basic operating principle
    - operating conditions
    - number of people and time required to complete the task
- Move to a Body*
    - examples, lists
    - components of the product or idea
    - analysis of the product / process
    - where and how it works [one complete cycle]
    - other specific details needed by the audience (ex., color, measurements, location, texture, quantity, ingredients, expiration date, desired reaction, packaging, price)
    - special characteristics (product differentiation [poss. competitor and why outs is best] or non-standard features)
    - demonstration
    - statistics
    - product endorsements or user testimonials
- End with a Conclusion*
    - restatement of the thesis with value to the audience
    - with reassembled finished product
    - contact information
- Include when the product/idea will be effective
- Are written with usability as a criteria
- Are written as third-person (it, the item) statements of fact
- Have information prioritized
- May include evidence and sources (ex., URL of publisher)
- May include a company logo
- Offer definitions as needed (ex., Glossary)
- Stress safety information (ex., hazards, warnings, danger, caution, alerts, notes)** and emergency contact/procedures
- List manufacturer and how to find/purchase the product (possibly cost, as well)
- May offer warranty coverage
- Should include a date of issue (for easier updating and tracking later)
- Should include a header/footer with key info. Including updates
- May need to be translated for non-English speaking readers
- Could be offered elsewhere in a back-up format and this information communicated to users (ex., hard-copy manual could also be published online)

<u>Examples</u>: Reference Manuals, Quick Reference Guides, Online Documentation, Procedures Guides, Policy Manuals, Standard Operating Procedures (SOPs), General Worksheets, Safety Manuals, Job Posters, Job Descriptions (*HR Manual*), Websites (products, mission, philosophy), Performance Reviews, SWOT Analyses (and other competitor research findings), Product Literature, Media Releases about events, occasions, Specifications, Sales Reports, Service Offer

*Topics are not necessarily covered in the order listed.
**Consult the appropriate sources such as OSHA, Dept. of Labor

Synonyms: Code**,** Overview

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Effective Instructions:

- Start with an analysis of the audience, poss. Including age, training or other credentials, prior knowledge of topic
- Tell the reader "how to" do something (ex., use a product)
- List clear purpose, benefits (value) in the Introduction
- Use a clear, limiting (2-part) title (ex., Instructions: How to XYZ)
- Include an equipment, materials needed and/or tool list at beginning
- Have a list of contents, possibly an index (if online, make these links)
- Identify the publisher/issuer of the instructions (include URL)
- State usage and frequency guidelines
- Use subheads to help organize the text
- Have an Introduction that includes the number of people and estimated time required to complete the task
    - Have a Body with numbered steps in chronological order
    - Start each step with an active verb (this list is an example)
    - Write in second-person (you, your) orders
    - Have one action per step
- List where and when the instructions will be used
- Include a Conclusion that may have a Troubleshooting Guide**
- Make use of "needful" repetition through subheads, titles of graphics, captions, etc.
- May include a site map
- May include a timeline of events (good for visual vs. text readers)
- Consider whether yours are text or visual "readers" and, if visual, decide how many instructions you can present via graphics
- Include well-labeled graphics (title, caption, callouts, sources cited) next to the appropriate step
- Offer a picture of the finished item/product and expected outcomes
- May include a warranty
- Include descriptions
- Offer maintenance and preventive maintenance information
- Have safety tips (ex., hazards, warnings, danger, caution, alerts, precautions, notes) for harm to people, product, equipment, and/or facility
- Offer safety tips at the beginning and again at the moment of instruction
- Include what to do in case of an emergency (accident, injury), including First Aid and an emergency contact number
- Offer definitions as needed (ex., Glossary)
- May incorporate checkpoints so user can assess his/her progress (ex., When Step 4 is completed, the user will see…)
- May include an FAQ (Frequently Asked Questions) list
- Are brief (phrases vs. sentences)
- If a kit, list all items in the kit along with a visual
- Include requirements and time needed for completing the process
- Offer help (customer service phone number, e-mail, website, FAQs, hotline) in order that the company would prefer (least expensive to most expensive help options)
- Should include a date of issue (for easier updating and tracking later) and last updated MM/DD/YY
- Should include a header/footer with key info. Including updates
- May need to be translated for non-English speaking users
- May include a deadline for completion
- Highlight any changes from previous editions
- Have been beta tested (a typical user critiques a draft of the instructions before they are published; subsequent drafts include revisions based on the beta tester's experience)
- Offer hints/tips/notes that will save the user time and effort

Examples: User Manuals, Tutorials, Instructions, Training, Job Aids on Machines, "Help" Screens, Assembly Line Guidelines, Online Documentation, Equipment Literature, Memos, Manuals, Work Journals/Logs, Blueprints, Certification Processes, Emergency Plans, Directions to locations, Forms, Applications, Tests, Examinations, Policy/Procedures, Software Installation, Recipes, Instructions for Care, Shutdown Procedures, Job Ticket/Work Order, Instruction Memos from Boss

**Troubleshooting Guides are usually presented using a table:

Problem	Probable Cause(s)	Possible Solution(s)

Synonyms: Guidelines, Procedures, Directions, How-To

2/2009, Rev. 2/2011, 6/2011, 9/2011, 2/2012, 5/2012, 10/2012, 6/2013, 2/2016, 10/2016, 1/2017, 2/2017, 2/2017_2, 10/2017