

TCO 341 Guide to Instructions

1. Know your audience.

Most college assignments are written for an ideal reader -- an expert whose job includes scrutinizing and pondering everything that you write. But in the real world, **write instructions so that impatient, fatigued, or even terrified readers can understand** with minimal effort. No matter how well you plan your document, there is no way you can possibly predict all the ways that human beings will misunderstand it.

2. Provide a brief introduction.

Help your readers determine, even before opening the brochure or downloading the web page, whether this document will help them do whatever it is they want to do. State in plain language, what your document will help the reader to do: "Installing and Operating the Canon BJ-200ex Bubble Jet Printer."

What is the **purpose** of the document, **who should read it**, and under what **circumstances**? If it will help your reader, you might also explain what your document does **not** do. If you wish, you may place extended background information in a subordinate position (a marginal note, a sidebar, or a completely different document) that does not interfere with the user's access to the list of required actions. *Note: Technical support documents are no place for marketing slogans -- the reader has already got the product, and is probably annoyed with it at the moment.*

3. Write each step as a command.

Use the the imperative mood -- that is, phrase each step as if your reader has just asked, "What should I do next?" Answer by giving a direct command: "Add two cups of flour."

"Tab A should be inserted into slot B."

A reader consults a set of instructions in order to find out what actions to perform, but this phrasing de-emphasizes the action.

Who or what is supposed to insert the tab? Is this a value statement, akin to "The world's precious resources should be conserved"? One might agree with that assertion, but still have no idea how to go about performing the action of conserving. For this reason, commands should employ the [active voice](#).

"Insert tab A into slot B."

This revision begins with a verb that specifies what action the reader is supposed to perform.

Note: most readers will skip the introduction and start reading at the first numbered step. If your user will need to know a lot of background information before beginning, put the vital information into the form of a checklist, rather than a long, discursive essay.

4. Use numbers for commands, bullets for options.

Since some readers will only need help for one section of a larger operation, divide up your instructions according to discrete subtasks. If you want your reader to perform tasks in a specific sequence, number the steps. If you want your reader to choose from among a list of options, bullet the options (otherwise the reader won't know when to stop). Write brief introductions to each section, to clarify whether a list of steps is supposed to be sequential or optional.

5. Plan to Test and Revise

Instead of investing your resources into polishing your first draft, **create a prototype and conduct usability testing on it**. You'll be surprised at how much you can learn.

1. As closely as is practical, simulate the environment in which you intend your audience to follow your instructions.
2. Find a volunteer who represents the intended audience, and ask him or her to follow your instructions.
3. Keep quiet and take careful note of any problems.
4. Revise your document, and then try again with another volunteer.
5. Repeat until you are satisfied with the results.

Adapted from: <http://jerz.setonhill.edu/writing/technical/instructions/>