MORE THAN PRETTY

Designing Effective Training and Help Documents

Rosendo Gonzalez, M.Ed.

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Acknowledgements

Since my first job in the document industry in 1978 when I helped run a printing press, I have learned from managers, colleagues, employees, professors, and students. If we have ever worked together, whether you realize it or not, I learned something from you. I am still learning, and do not expect that to change.

I have included some of the best books I have learned from in the Suggested Reading list. There are many more, but if you study these authors' work, and read this book, you will already be far ahead in your field.

I owe thanks to the colleagues who read through drafts of the book, provided encouragement, caught errors, and provided suggestions for improvement. Special thanks must go to Thomas Edgerton who gave me the opportunity to join him at Sun Microsystems in the late 90s and launched me headfirst into the field of instructional design. I learned many things from Thomas, including the relentless and disciplined axiom that success in projects was "by design."

Introduction

Is This Book for You?

Across the table from me was a friend and accomplished graphic designer. “On a scale of one to ten, how would you rate my design skill?” I asked him. He paused, and answered, “Three.”

Thankfully, that was more than twenty years ago. A few years into my instructional design career, it became apparent that most training documents were poor-to-mediocre in their design. As a new instructional designer, I wanted to be good at what I did. To create top-notch training documents, I knew I had to get better at document design. I had the courage to ask for his honest opinion because I wanted to be better at document design, but I had doubts that I could be. It seemed that graphic designers were visual savants, and I knew that I was not. I had experience in photography and the printing industry, with an English degree. Now I was an instructional designer who designed training documents — I was good with words, organizing information, evaluating learning needs, and creating learning objectives, but terrible at document design.

The document design skill that I have developed since then is not through not any superior design talent; I accomplished it through the ability to learn and the willingness to practice. If you recognize the importance of good document design in the training and help domains, but do not yet have all the requisite skill and experience, then this book is for you.

This book introduces a process to follow, rather than being primarily organized around discrete topics that could go in any order. If you do not know how to bake, *5 Tips for Baking a Great Cake* will not likely produce a great outcome. You need to understand the whole process first. There is a thread to follow, and I tried to manage the amount of content so that the thread would not be lost. It is not *20 Great Document Design Ideas*, more like *5 Important Steps*.

My hope is that you will read the whole book, and then refer to sections as needed. Although I integrate information and instructional design principles, these are not the primary focus. The primary focus is on the visual and structural design of documents that are intended to improve performance. Read this book and it will immediately improve your documents.

The Value of Good Design

Instructional designers are sometimes asked to create documents that are going to be utilized by instructors, or *trainers* as they are sometimes referred to. Once, in a meeting with a stakeholder and a trainer, the stakeholder handed me a document that the trainer had created, and asked me to improve it. The trainer declared, with a wave of her hand, "Oh yes, make it pretty."

This dismissive attitude is quite common, and stems from the notion that the generation of information is the most critical component of any performance improvement deliverable, and the rest is just window-dressing — nice to have, pretty to look at, but hardly critical. Those who hold this attitude could not be more wrong. Read online product reviews and you will see how terrible instructions can completely destroy the user experience for an otherwise good product. The same can happen with poorly designed training or help documents. I have seen instructional designers labeled *learning experience designers*. Ask yourself what kind of experience is your document creating? "Making it pretty" was not going to be enough to make that trainer's documents effective. They were poorly organized, poorly formatted, and poorly written. To the untrained eye, "pretty" can actually mask poor information and instructional design.

This list summarizes the effects of poorly designed and implemented training and help documents:

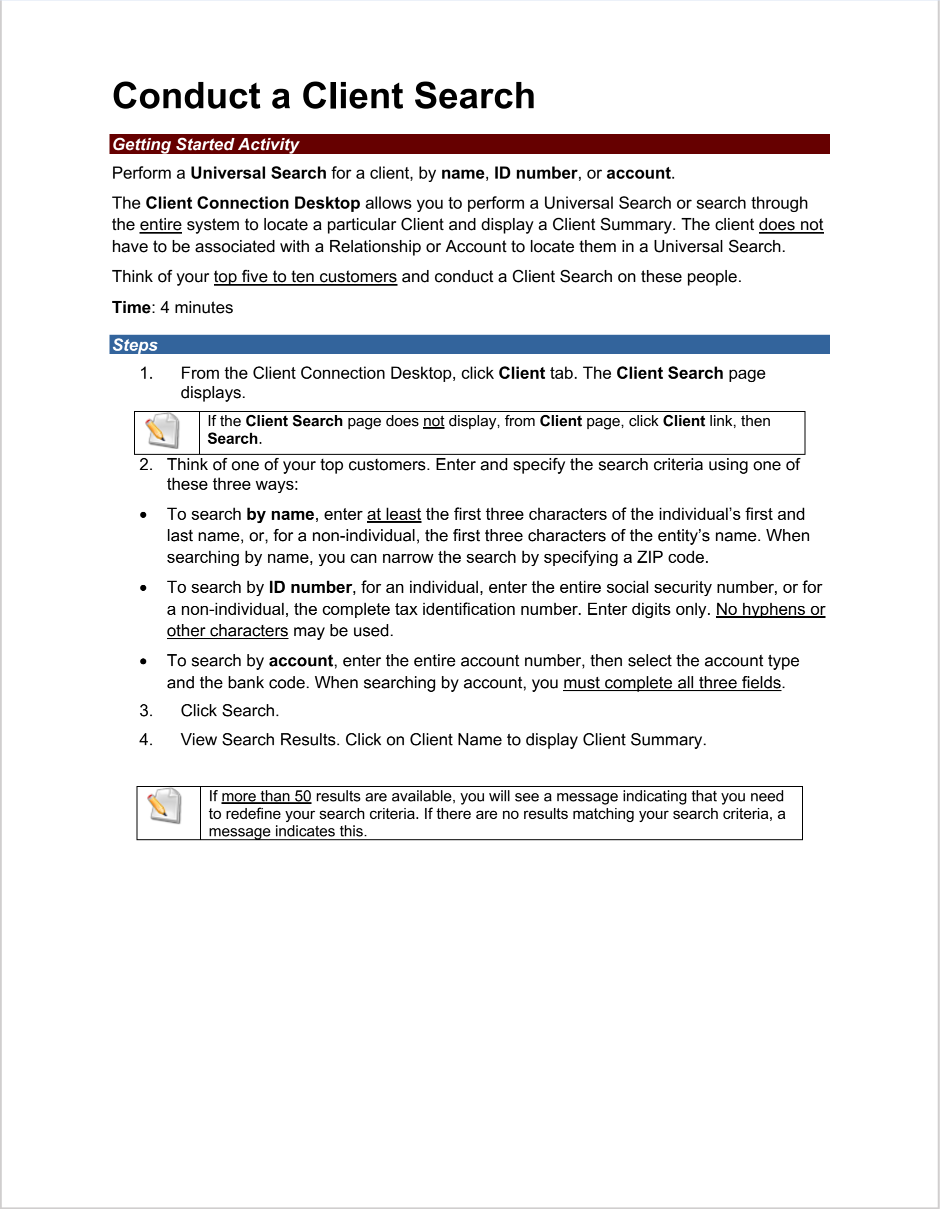
- Lack of clarity on the purpose of the document leads to cross-purposes and ineffectiveness.
- Poor appearance reflects badly on the organization and undermines credibility.
- Poor instructional design, information design, or graphic design obstruct information transfer.
- Bad user experience leads to poor adoption by the target audience.
- Version control is lost, and outdated information is used. Source documents are lost, producing extensive rework.

When comparing documents, almost all people can identify the more attractive document. A smaller percentage will recognize the more *effective* document. This primarily stems from the fact that most stakeholders are familiar with the content — they are not relying on the document to understand the topic — but they can see which one *looks* better. Aesthetic appeal, in the classical sense, means the information is easily perceived and follows visual principles that encourage consumption of the content. You could say that a well-designed document increases the aesthetic appeal, and that will increase the receptivity of the reader. This is the partial truth to the value of making something "pretty." However, if you just stop at pretty, then you are stopping short of what can be achieved with the visual and structural design of your document, which in turn will diminish its effectiveness. Figure 1 shows the difference.

Figure 1 *– Three Versions of the Same Document*

UGLY

This version has multiple formatting problems, and as a result, is cluttered and difficult to absorb.



Conduct a Client Search

Getting Started Activity

Perform a **Universal Search** for a client, by **name**, **ID number**, or **account**.

The **Client Connection Desktop** allows you to perform a Universal Search or search through the entire system to locate a particular Client and display a Client Summary. The client does not have to be associated with a Relationship or Account to locate them in a Universal Search.

Think of your top five to ten customers and conduct a Client Search on these people.

Time: 4 minutes

Steps

1. From the Client Connection Desktop, click **Client** tab. The **Client Search** page displays.

If the **Client Search** page does not display, from **Client** page, click **Client** link, then **Search**.

2. Think of one of your top customers. Enter and specify the search criteria using one of these three ways:

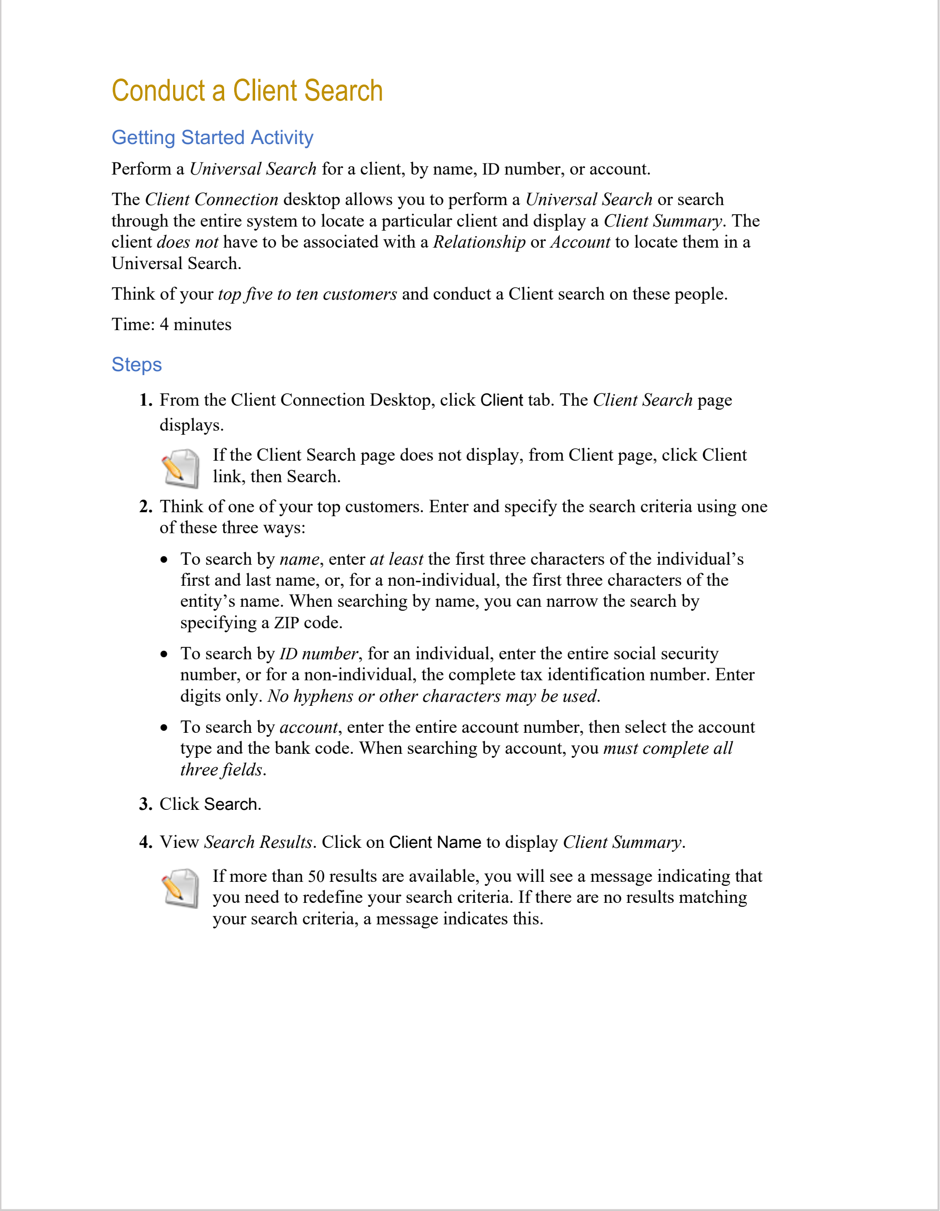
- To search **by name**, enter at least the first three characters of the individual's first and last name, or, for a non-individual, the first three characters of the entity's name. When searching by name, you can narrow the search by specifying a ZIP code.
- To search by **ID number**, for an individual, enter the entire social security number, or for a non-individual, the complete tax identification number. Enter digits only. No hyphens or other characters may be used.
- To search by **account**, enter the entire account number, then select the account type and the bank code. When searching by account, you must complete all three fields.

3. Click Search.
4. View Search Results. Click on Client Name to display Client Summary.

If more than 50 results are available, you will see a message indicating that you need to redefine your search criteria. If there are no results matching your search criteria, a message indicates this.

PRETTY

This version utilizes better formatting and invites the reader in with a more attractive appearance.



Conduct a Client Search

Getting Started Activity

Perform a *Universal Search* for a client, by name, ID number, or account.

The *Client Connection* desktop allows you to perform a *Universal Search* or search through the entire system to locate a particular client and display a *Client Summary*. The client *does not* have to be associated with a *Relationship* or *Account* to locate them in a Universal Search.

Think of your *top five to ten customers* and conduct a Client search on these people.

Time: 4 minutes

Steps

1. From the Client Connection Desktop, click Client tab. The *Client Search* page displays.

   If the Client Search page does not display, from Client page, click Client link, then Search.

2. Think of one of your top customers. Enter and specify the search criteria using one of these three ways:

   - To search by *name*, enter *at least* the first three characters of the individual's first and last name, or, for a non-individual, the first three characters of the entity's name. When searching by name, you can narrow the search by specifying a ZIP code.
   - To search by *ID number*, for an individual, enter the entire social security number, or for a non-individual, the complete tax identification number. Enter digits only. *No hyphens or other characters may be used*.
   - To search by *account*, enter the entire account number, then select the account type and the bank code. When searching by account, you *must complete all three fields*.

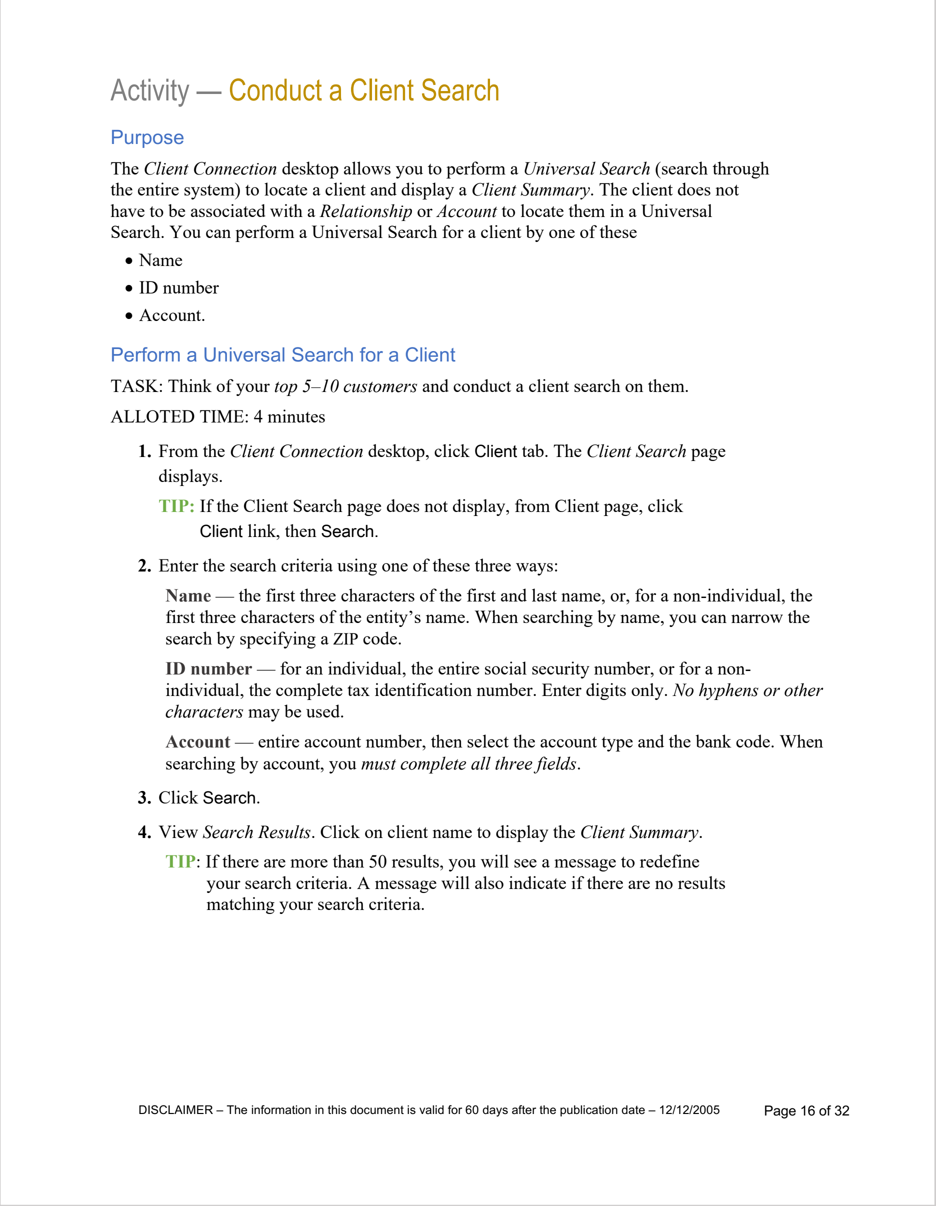
3. Click Search.

4. View *Search Results*. Click on Client Name to display *Client Summary*.

   If more than 50 results are available, you will see a message indicating that you need to redefine your search criteria. If there are no results matching your search criteria, a message indicates this.

EFFECTIVE

This version not only makes more effective use of formatting, it also has some reordering of the structure to a more logical order, the addition of a footer for versioning, replacement of an ambigous icon, and some editing of the text for clarity and conciseness.



Activity — Conduct a Client Search

Purpose

The *Client Connection* desktop allows you to perform a *Universal Search* (search through the entire system) to locate a client and display a *Client Summary*. The client does not have to be associated with a *Relationship* or *Account* to locate them in a Universal Search. You can perform a Universal Search for a client by one of these

- Name
- ID number
- Account.

Perform a Universal Search for a Client

TASK: Think of your *top 5–10 customers* and conduct a client search on them.

ALLOTED TIME: 4 minutes

1. From the *Client Connection* desktop, click Client tab. The *Client Search* page displays.

   TIP: If the Client Search page does not display, from Client page, click Client link, then Search.

2. Enter the search criteria using one of these three ways:

   Name — the first three characters of the first and last name, or, for a non-individual, the first three characters of the entity's name. When searching by name, you can narrow the search by specifying a ZIP code.

   ID number — for an individual, the entire social security number, or for a non-individual, the complete tax identification number. Enter digits only. *No hyphens or other characters* may be used.

   Account — entire account number, then select the account type and the bank code. When searching by account, you *must complete all three fields*.

3. Click Search.

4. View *Search Results*. Click on client name to display the *Client Summary*.

   TIP: If there are more than 50 results, you will see a message to redefine your search criteria. A message will also indicate if there are no results matching your search criteria.

DISCLAIMER – The information in this document is valid for 60 days after the publication date – 12/12/2005 Page 16 of 32

Conclusion

If you are designing a training or help document, your function is to take information and make it useful to improve performance. Creating these effective documents involves instructional design, information design, and graphic design. You must strive for more than pretty and make sure that your structural and visual design is adding to the effectiveness of a document, not detracting from it. What is the bottom line? *Performance either improves or suffers as a result of your design*. That is why any of this matters.

CHAPTER 1 Training or Help?

What is the Difference Between Training and Help?

Everybody knows what training means. You go to a class, or take some eLearning, watch a video, or read something — you learn, and then you do your job better. But what if you have a chart pinned to your cubicle, a job aid on a bookshelf, or a help page bookmarked in your browser, and use it to quickly reference some information? Is that still training? Did you really learn anything?

Training is usually conceived as an activity that requires learning that can be recalled, and applied to job performance. If you access information just-in-time, and get just-enough of what you need to perform your job, it can be referred to as *performance support, help,* or *user assistance.* But what if you took a class three months ago, then look up a procedure from the class participant guide, perform it, and then remember it so you do not need to reference the participant guide next time? The training vs. performance support labels serve a purpose, but reside on a continuum. In some cases, there is a clear distinction, in other cases, the two can overlap. The important thing is that they both have one goal: to improve performance.

Throughout this book when I want to refer to both kinds of documents, I will use the term *performance improvement document*, which is a broader inclusive term as shown in Figure 2.

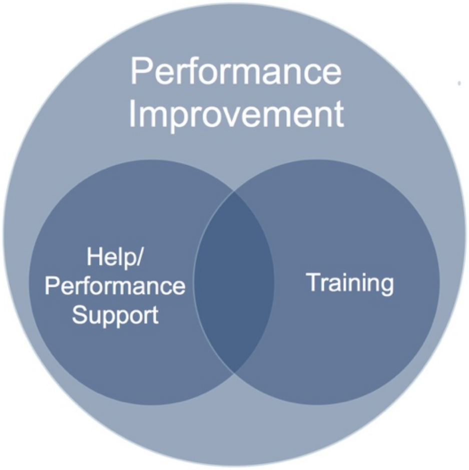


Figure 2 *– Help and Training are overlapping categories of Performance Improvement.*

It is important to identify where on the continuum your document resides because that will influence your design decisions. For example, a help document may have far less information than a training document, because one is intended to produce recall, whereas the help document is intended to provide just-in-time information. The training document would have a practice activity to reinforce the content; the performance support document would not.

What Is a Document?

This book focuses on performance improvement documents, which I have defined in two broad categories: training and help. This means it covers any document in print format that is designed to improve performance. Print format means that the document is *static* and designed for printing (even if it is distributed electronically.) By contrast, if the material is *dynamic* and not designed for printing, it can share any of these characteristics:

- Content that can change in real time (like a web page)
- Rich media (animation, video, audio)
- Formatting for a screen rather than paper

In short, this book does not address designing eLearning, web pages, video, or audio. In the performance improvement world, the form content takes is called *modality, medium,* or *delivery method*. Modality can also take several forms at once, for example, a class may be delivered by an instructor in a classroom, but also include a participant guide and a few job aids. For the purposes of this book, we can assume that the modality will always include a print document.

What About Tools?

Throughout this book I avoid any tool-specific tips or references because in the twenty-plus years I have been in the Learning and Development field, tools have changed. Beware of placing primary importance on a particular page layout or graphic program. Having these tools will not transform you into a better document designer, unless you also have design skills to utilize their greater capabilities. Universal design principles can be applied with any tool, from a word processor to a complicated page layout program. When tools change, migrate those principles to the new tool. If you need help with a particular tool, there are ample resources that can be found online. If you would really like a solid start with a tool, then I would recommend an in-person class with opportunities for guided practice.

CHAPTER 2 Information Design Principles

Introduction

You really cannot practice document design without information design — they overlap but are not equivalent, as shown in Figure 3. Information design pertains to the organizing and presenting of information to achieve effective and efficient transfer of information. Information design can span all kinds of documents, and can apply to graphics as well; it is not exclusive to performance improvement documents. Whenever you are making decisions about how to present information, you are practicing information design. In contrast, learner and task analysis, assessments, and learning objectives are the domain of instructional design. Finally, decisions about layout, graphics, and typography are part of what I call graphic design. Performance support document design requires an awareness of how each structural and formatting decision contributes to effective and efficient transfer of information, as well as incorporating appropriate instructional design elements.

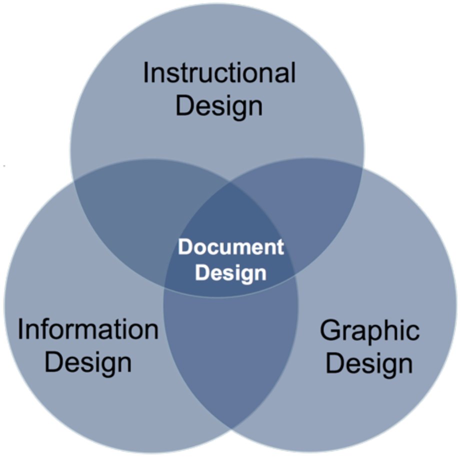


Figure 3 *– Design for performance support documents requires three disciplines.*

Schema and Information Design

When practicing information design, you have to consider the basis for organizing information. For performance improvement documents, I think in terms of organizing principles, or *schema.* These are the schema categories that I use[1]:

Sequential (alphabet, steps, time) – how to empty your browser cache.
Category (pre-established types/categories) – types of loans
Conceptual (ideas, concepts, logic) – why managers do not delegate
Magnitude (greater to smaller, many to few) – largest earthquakes
Location (physical space) – parts of a machine
Random (no particular order) – three ways to increase employee retention

Three Information Design Techniques

To realize your schema, there are three primary information design techniques that can be used, sometimes in combination with each other:

Grouping – what goes together
Placing – the location of information on a page or in a document
Hierarchy – ranks or levels of information

These three methods are utilized repeatedly on a micro-to-macro level — from words to sentences to paragraphs to sections to chapters.

The schema is the rationale for the structure of the information — the reason you group content, place one thing somewhere, and create hierarchies of information. When you are utilizing your schema, you are presenting structured information with the intention that it be adopted —providing a tool for your reader to organize information in their own mind. It is entirely possible to have schemas within schemas, but you always need to be aware of keeping the integrity of your schemas intact.

---

[1] Some of my categories are based in work by Richard Wurman and Nathan Shedroff.

Table 1 shows an outline in terms of schema and information design formatting techniques.

Topic	Schema	Formatting
Do-It-Yourself Car Maintenance	Category	Top-left/bold
A. Basic DIY	Magnitude: difficulty	First indent
I. Fluids	Category	Second indent
1. Engine Oil	Category	Third indent
a. Checking Oil Level	Sequential	Fourth indent
1. Car level	Sequential	Fifth Indent
2. Locate dipstick	Sequential	Grouped by enumerator
3. Remove dipstick	Sequential	Grouped by enumerator
4. Wipe oil with rag	Sequential	Grouped by enumerator
5. Reinsert dipstick	Sequential	Grouped by enumerator
i. Do not force	Conceptual	Fifth indent
ii. Insert fully	Conceptual	Grouped by enumerator
6. Remove dipstick	Sequential	Grouped by enumerator
7. Compare level to marks	Sequential	Grouped by enumerator
II. Filters	Category	Second indent
1. Air filter	Random order	Third indent
2. Cabin filters	Random order	Grouped by enumerator
B. Advanced DIY	Magnitude: difficulty	First indent
I. Brakes	Random order	Second indent
II. Belts	Random order	Grouped by enumerator

Table 1 *– Outlines are good examples of schema and formatting working together.*

The primary schema is the category of Do-It-Yourself (DIY) Car Maintenance. Grouping is achieved by indenting and alignment, and using the same type of *enumeration* (1, a, i, etc.) Sequencing is achieved by the top-down flow, and the order of enumerations. Indenting and alignment, for example between "5. Reinsert dipstick" and "a. Do not force," creates a hierarchy of primary and secondary (supplementary) information. Placing the first line at the top-left tells the reader that is the starting place, and the highest level of information.

Deconstructing content this way can seem complex, but I believe most people are accustomed to the schema categories and techniques I have listed. We will revisit creating hierarchies, grouping, and placement in more detail in subsequent chapters. The more you organize information, the more familiar the schemas and techniques become. You must be cognizant of your schema so that you do not fall out of your organization. If in the above content outline you introduced how the make of a car affects resale value, would it fit in the schema? Maybe it would, in the sense that maintenance can affect resale value. But you would need to connect the topic to the schema. You could change your top schema to *Things You Can Do to Improve Your Used*

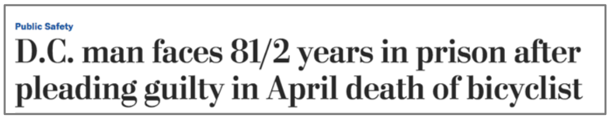
Car's Value, and then in addition to maintenance, you could add avoiding certain makes of car to the outline.

Importance of Conventions

I probably did not have to tell you in the car maintenance outline that indents, alignment, and enumerations signified grouping. You knew that items using the same indentation and type of enumeration were grouped for a reason. You knew that because of formatting *conventions* – widely established and accepted ways of using document formatting. Conventions are short-cuts to meaning. Conventions start out as good design, and then are adopted as a best practice. If you know the proper use of a convention, then you will likely do a better design job than someone who does not. In a more extreme case, you may cause confusion by using the wrong convention. How would you interpret each of these?

A Medication dosage -3 ML
B Medication dosage — 3 mill
C Medication dosage-3 Ml
D Medication dosage – 3 ml

The kind of dash, the space around it, and the abbreviation for milliliter (ml) all have conventions. Does item A mean lower (minus) the dosage by 3? Does item B mean 3 million units? What does item C mean? Item D utilizes conventions and is the clearest. Figure 4 shows what happens when a simple spacing convention is missing.



Public Safety

D.C. man faces 81/2 years in prison after pleading guilty in April death of bicyclist

© Washington Post

Figure 4 *– Conventions convey meaning. How many years?*

When you use conventions, you have the best chance of being understood because they are based on good design, and most of us know what they denote. *A large part of effective formatting is utilizing established conventions, and creating consistent variations on these conventions, all of which create visual analogs to your schema.*

✓ Design Exercise

Your manager asks you to create job aids to familiarize workers with a new multi-function copy machine. Come up with a way to use each of these schema types:

- Sequential
- Category
- Conceptual
- Magnitude
- Location

Compare your ideas with the answers at end of the chapter.

Conclusion

The structure and formatting of your document should serve your schema, and your tools are grouping, placing, and establishing hierarchies. *Every formatting decision I make with performance improvement documents utilizes graphic design to create visual analogues for information design and instructional design*. The pages that follow will make that connection for you by starting on a broad level and drilling down. I start with the type of document and its components, then explain page design, and finish with content formatting and conventions. The result of these techniques should be to support the purpose of the document by achieving clear, predictable meaning.

✓ Design Exercise Answer

Here are examples of how each schema type could be used to organize information effectively.

Sequential – how to replace a toner cartridge
Category – functions: copying, printing, scanning
Conceptual – troubleshooting errors
Magnitude – available paper sizes from smallest to largest
Location – using the three paper trays