



Instructions

Instructions are written as a means to provide audience members with step-by-step process descriptions for the purpose of performing a task.

1. Considerations:

- A. Analyze your audience and purpose before you begin writing the instructions—a knowledge base for your coworkers will not be as specific as instructions for consumers.
- B. Determine where the reader will be using the instructions—if the instructions are for an outdoor project, the instructions will need to be printed on durable, perhaps even waterproof paper.
- C. Rate the difficulty level and provide graphics to accompany more difficult projects.
- D. Follow the safety guidelines by providing appropriate signal words with the appropriate color indicator:
 - I. **DANGER = Red** and is used to alert readers of an immediate and serious or fatal hazard.
 - II. **WARNING = Orange** and is used to alert readers about the potential for serious injury, death, or damage to equipment.
 - III. **CAUTION = Yellow** and is used to alert readers that there is a potential for moderate to serious injury or damage to equipment.
 - IV. “Note” is used to offer a tip or a suggestion that may help the reader succeed in following the instructions.
 - V. Any signal word and its accompanying information should be of a different font, and a highlighting device such as bolding or underlining should be used.
- E. Perform a usability test to measure the effectiveness of your instructions.

2. Characteristics of Effective Instructions:

- A. Simple language—clear and concise.
- B. Imperative mood—very direct and to the point. (Imperative mood gives a command. “Open the door” is imperative. The “you” is implied—“You open the door,” or: “Open the door.”)
- C. Include all necessary parts of speech—do not leave articles out.
- D. Use headings and provide easily identifiable steps.
- E. Provide more white space than text—instructions that are filled with text and little white space add to the user’s anxiety level.
- F. Identify the graphics clearly—match the graphics and text horizontally and with prompts from the text such as “see Figure 1.” The graphic or figure should contain a label: “Figure 1,” and there should be a name following the label. Also, there should be a caption underneath the graphic that gives additional information.

3. Content of Instructions: Instructions contain three sections: Introduction, Step-by-Step Instructions, and Conclusion.

- A. Introduction: The introduction’s function is to provide general information about the process that the reader will be performing. It will contain the following information:
 - I. Safety information in a clear and concise simple sentence.



- II. Skill level: If you have written instructions for an electrician, you should state that only a licensed electrician should attempt this process.
- III. Level of difficulty: This is especially important for highly technical processes.
- IV. Why your reader will be using these instructions.
- V. When will these instructions be needed—every four months, etc.?
- VI. Tools and materials that your reader will need to perform these instructions.
- VII. Length of time to complete the tasks.
- VIII. Specific referencing points and/or parts included in the packaging.

B. Step-by-Step Instructions:

- I. Give your reader specific cues for each step: “Step One,” or “Step 1,” or “1.” Some use “A, B, C.” If the instructions are complicated, use 1, 1.1, 1.2, and 2, 2.1, 2.2, etc. If you have a long list of instructions, try to logically break them into six or more steps and give each step a main heading.
- II. Provide only enough information that the reader can perform the task without looking at the instructions—too many actions in one step will create confusion.
- III. Use the imperative mood.
- IV. Provide clear and specific steps and follow with clear and specific feedback. The step is the action you are directing the reader to perform and the feedback is an event that occurs as a result of the step. “Step—insert disk into disk drive.” “Response or feedback—the disk will begin formatting your hard drive.” Feedback statements are not numbered but are housed in the step to which they refer back to the action. You can highlight the feedback so that your reader will note that it is different from the instructions. For highlighting, either underline it or put it in italics. Do not use bold because bold indicates a higher level of importance. The important information is the step.
- V. Include graphics for clarifying one or more steps but place the graphic horizontal to the text and prompt your audience to the graphic through a statement such as “See Figure 1.”

C. Conclusion: Conclusions are essentially an ending to the instructions.

- I. Provide a cue that the process is complete.
- II. Provide waiting or downloading time.
- III. May provide maintenance tips or a troubleshooting guide table.
- IV. May provide website information, call centers, and/or technical support numbers.

Note: Well-written instructions will save companies money because the consumer is less likely to rely upon calling a helpdesk or a technical support person.