

# Instructing

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- Instructions are step-by-step explanations for how to do something
- Typically, instructions explain how to assemble something, operate something, or repair something
- When you write a set of instructions, your goal is to help your reader do something quickly, efficiently and successfully

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Good instructions make sure:

- Every detail is included
- Every detail is accurate
- The steps are in the right order

If you leave something out or make a mistake, it will frustrate your reader.

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- Besides getting the details right, instructions must be very concise
- Don't include extra words, steps, or information your reader doesn't need

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To write instructions:

- Identify the audience
- Identify the number of steps
- Group the steps
- Write the introduction
- Write the steps

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- The first step in writing instructions is to *identify the audience*
- As you go through the stages of planning, organizing and writing, you must always remember the needs, interests, and background of your readers
- The types of readers you might encounter are...

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## *Experts:*

- People who know the product inside and out. They designed it, tested it, and know everything about it
- Experts may have advanced degrees and work at universities or in research and development departments

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## *Technicians:*

- People who build, operate, maintain, and repair the product
- Techs also have highly technical knowledge, but of a more practical nature

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## *Executives:*

- People who make business, economic, and administrative decisions about the product
- Executives decide when, where, and how to build and market the product
- They usually have considerable business knowledge, but little technical knowledge

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## *Nonspecialists:*

- People who want to use the product
- Nonspecialists usually have little technical or business knowledge

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- Once you've identified the audience, the next task is to identify the *number of steps*
- Some things are easy to do, and require only a limited number of steps. Others, however, are more complex, and require many more steps. For example:
  - Sending a text message on your cell phone contains a small number of steps
  - Assembling the various components of your cell phone contains many more steps

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When identifying the number of steps, keep in mind:

- The *background* of your audience. How much knowledge, experience, or training can you expect from your readers?
- The *needs and interests* of your audience. What will your audience expect from your instructions?

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How do you identify the number of steps?

*Go through the process yourself, stop after every step and record every detail.*

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Now that you've identified the number of steps, the next step is to *group the steps*. Within the list of steps, there may be natural divisions. Two common groups are:

- Tasks
- Tools

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- In the *task* approach you group steps based on tasks your reader will do
- For example, if you're writing instructions for using a cell phone you could group the instructions by such tasks as recording your greeting, playing back messages, saving messages, forwarding messages, etc.

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- In the *tools* approach, you group steps based on the different parts of the product or machine
- For example, if you're writing instructions for using a cell phone you could group instructions by the different buttons and keys on the phone, such as the power button, the dial and disconnect keys, the menu key, etc.

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Once you've grouped the steps, it's time to *write the introduction*. The introduction should:

- Summarize what the instructions do
- Describe what's included and what isn't (the scope)
- Explain the background needed to follow the instructions
- Indicate any special conditions needed to follow the instructions
- Describe any required equipment or supplies
- Include key warnings, cautions, or danger notices

Despite the importance of the introduction, make sure to keep it short and to the point.

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- Finally! It's time to *write the steps*
- When writing the steps, you have to decide how to structure your words.
- There are many approaches to organizing instructions, including...

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## *Fixed-order steps:*

- These steps must be performed in the order presented
- For example, when changing the oil in a car, you must drain the old oil before putting in the new oil
- For fixed-order steps, it's best to use numbered lists (usually, vertical numbered lists)

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## *Variable-order steps:*

- These steps can be performed in almost any order
- For example, when your computer can't connect to the internet, you need to check multiple things (your connection, your modem, your router, etc.) to diagnose the problem
- For variable-order steps, use a bulleted list format

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## *Alternate steps:*

- Alternate steps describe two or more ways to accomplish the same thing
- For example, the different ways to add a new contact to your cell phone
- For alternate steps, use bulleted lists with OR inserted between the alternatives

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## *Nested steps:*

- When individual steps are complex, you need to break the steps down into substeps
- For example, building an addition to your home requires so many steps that you should list the major steps and then subsequently describe those steps in more detail
- For nested steps, indent and sequence the substeps as a, b, c, and so on

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## *"Stepless" instructions:*

- Finally, there are those instructions that really don't need a numbered vertical list or some other ordering
- For example, situations that are so generalized or so variable that adding steps to the instructions do not help the reader

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- Remember, when writing instructions, make sure that every word is necessary
- You do this by striving for conciseness
- To achieve conciseness, eliminate *redundant words* and *padded phrases*

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*Redundant words* repeat the idea contained in the word they modify. For example:

- 12 noon
- Blue in color
- Brief in duration
- Past experience

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*A padded phrase* uses extra words to express an idea:

*"Due to the fact that I don't have enough information, I need more information to be provided so that I can process the information."*

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In addition to writing concisely, a common issue with instructions is the use of technical terms. For example:

- To a financial reader, "*divestiture*" means "*the disposition or sale of an asset by a company*"
- To a programmer, "*array*" means "*an area of storage containing data organized in rows and columns*"

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- If you're confident that your audience will understand the technical term, use it to ensure precision
- However, if you're not sure, define the term in plain language the first time you use it. If your audience is likely to be confused, explain it by including an easy-to-understand example

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- Unlike technical terms, jargon is specialized slang that is unique to a specific group
- For example, human resources professionals use "*headhunter*" to describe "*a recruiter of professional and executive personnel.*" But to others, a headhunter is "*a savage who cuts off and preserves the heads of enemies as trophies*"
- As a general rule, use jargon only in the appropriate context