

Guidelines for Effective Documents

Certain principles of clear communication apply whether the product is a manual, a report, a sales brochure, or online documentation. By following the guidelines listed here, a writer can produce work that is clear, concise, and easy to use. By applying these guidelines during review, an editor can help ensure effective communication.

Audience and Purpose

- The audience is consistently and clearly identified.
- The level of detail and language are appropriate to this audience.
- The document answers a specific, identified purpose for the audience.

Organization

- The overall design of the document reflects its purpose.
- The sequence of sections and topics reflects the way the audience will most likely use the document.
- There is an obvious hierarchy of headings and topics at all levels in the document.
- Titles, headings, and subheadings are clear and easy to use.
- Each piece of information is relevant to its heading or subheading.
- The text in each paragraph is limited to only one kind of information.

Reader Orientation

- Adequate information is provided on how to use the document, what other documents are needed, and what prerequisite knowledge is needed.
- Overviews are presented for each section, and within sections where appropriate.
- Long, complex procedures or sets of tasks are treated with overviews as well as detailed instructions.
- Summaries and quick-reference lists are provided where appropriate.

Accessibility

- The information is broken down into manageable pieces.
- Frequent use of headings, subheadings, and white space makes it easy to find information by scanning.
- A concrete explanation (such as a description, overview, or example) is provided wherever an abstract instruction or concept is introduced.
- Tables and bulleted lists are used where appropriate to eliminate wordiness and improve accessibility.
- Diagrams and illustrations are inserted logically wherever they are needed.

Completeness

- The document contains all of the information necessary to meet its stated purpose.
- There are no gaps in information, especially in knowledge the reader needs to perform tasks.
- All content is relevant to the defined purpose. No unnecessary information is included.

Consistency

- The same terms are used to mean the same things throughout.
- Similar formats (including lists, tables, and diagrams) are used for similar information.
- The same headings and subheadings are used consistently for similar pieces of information.

Writing Style

- The text is written in the present tense and, primarily, in the active voice.
- The text is written in simple, unambiguous language and is easy to read.
- The writing follows standard rules of grammar, punctuation, and usage.