

Aiding and Abetting Your Users

Building Help for Web Applications and ECommerce Sites

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In an ideal world, your business application or e-commerce site would be so intuitively designed that users would need no Help. They would breeze through the tasks of placing orders or entering transactions, using only the information presented in the interface. They would never get lost and give up on an order, never make errors, never need training or customer support.

But, while intuitive design and usability practices can make it possible for many users to "figure it out" (at least on simple tasks), there is always a subset of the user population that needs assistance. Also, the more robust and feature-rich an interface is, the greater the need for Help. The most successful e-commerce sites, such as Amazon.com and eBay, though considered models of usability, still provide detailed Help pages.

In many organizations, building Help is an afterthought, an extra job assigned to developers or business analysts or support. But creating effective Help is not easy. A good Help author needs the skills of a trainer, an editor and an information architect.

This article teaches the basics. It provides a blueprint for designing, building, and iteratively improving Help for applications and web sites.

The Question-Answering Machine

The first principle to understand about Help is that people turn to it only when they need a question answered. Effective Help content must be written with this in mind. It is not a description of all product features, and it is not the equivalent of a Functional Spec. Documentation and training expert William Horton once described the ideal Help system as a "Question Answering Machine."

The key to building good Help then is to anticipate the users' questions and provide the right answers as clearly and efficiently as possible. To do this, you must first understand the users and their interactions with the product or web site.

Analyze the Users and Tasks

Training professionals refer to these research steps as *audience analysis* and *task analysis*. Whether you are starting at the beginning of a development project or creating Help for an application or site that is already in production, be sure you can articulate the answers to these questions.

Who are the primary and secondary users? What is their level of understanding of the work? What is their attitude and comfort level? In the case of an application or B2B site, how does the technology change the way they formerly worked?

What tasks will users accomplish? Will they need detailed instructions for any task or is a process overview sufficient? Are task steps (high-level and detailed) clear from the interface or do they need to be explained in the Help?

What conceptual knowledge (domain knowledge) will users need in order to accomplish each task? Do they already have this knowledge or does it need to be provided in Help?

Where are users likely to need decision support for choosing options or deciding what data to enter? What guidelines and tips should the Help contain?

Design and Write the Content

By documenting your answers to these questions, you can develop an outline of the Help content. The outline should be reviewed by stakeholders and, ideally, by representative users. Remember

too that your goal is to answer questions. Continue to refine the outline until all of your content is structured around anticipated user questions and the best ways to present answers.

When you've done a thorough job with design, the writing itself is straightforward. You simply expand the approved outline, providing answers to the questions you've anticipated. The writing style and format are the same as for any online writing:

- Use the active voice and clear, direct statements.
- Make it easy to scan by using subheadings and bulleted lists. Use numbered lists for step-by-step instructions.
- Above all, be concise. Use as few words as possible.

Consider Access Methods

As with any hypertext, it is also crucial to design effective channels for the user to access the content. Your understanding of your users and the complexity of your interface will drive the answers to these questions:

- What does the Help front page look like? Does it contain explanatory text, a table of contents, a set of Frequently Asked Questions, or all of these?
- Is there a Search box for Help, and if so is it available on every page?
- Is the Help context-sensitive? That means, is there different Help content displayed from different locations in the interface?
- What other access channels might be appropriate? For example, eBay's Help offers an A to Z Index, an Acronyms list and a Glossary.

If, despite all your efforts, the user cannot find his or her answer in Help, what happens? Naturally, they'll want to contact a real person. While one of the goals of Help is to reduce the burden on customer service, it's also essential that you make it easy for the user to escalate their questions. Be sure to provide a contact form or email link to customer service throughout the Help. Consider also providing a phone number or live Chat service.

Make Iterative Improvements

No matter how strong your initial design, much of the information in an optimum Help system comes only from understanding users' real behavior with the application or web site, including the questions they ask and where they have trouble. Iterative enhancements to Help should be part of the ongoing maintenance cycle.

Information to improve Help can be obtained from usability testing and customer support logs. You might also include a user feedback forms within the Help. Here are the questions you need to answer:

- Are there parts of the initial Help system that are unclear and need revising? Are there parts of the Help that are unnecessary and should be deleted?
- Do users need help understanding when to use a particular page or process?
- Is the conceptual information and decision support built into the Help on-target? Where can it be improved?
- Are users failing to take advantage of advanced features for lack of understanding?
- Are their new FAQs that should be included?

By gathering feedback and iteratively improving the content, you can ensure an excellent Help system. As a result, you can reduce the ongoing costs of customer service and support, and ensure more productive and satisfied users.

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