GUIDELINES FOR PROCEDURES

“Toast” is the only procedure you will write this term. You’ll do fine with future ones if you remember the basic rules and techniques of Technical Communication. The material below is a “freebie” to help you next time; you will not be tested on it.

Characteristics of Procedures

Procedures seem easy to write, until you begin to explore what can go wrong if you make too few or bad assumptions!

- Procedures tell the reader how to do something; they are usually either informative (“If you should ever want to do…”) or instructional (“To hook up your DVD, perform the following steps:”). Procedures can be designed for one-time use (rich with explanations and introductions) or as reminders for experienced people (checklists).
- Procedures are designed specifically for their intended audience, and consider probable specific experience, education, general experience, language competence, age group, etc.
- Procedures are sequential steps – they must be performed in order. They are numbered to ensure that the reader knows the order, and knows where one step ends and the next begins. (Lists that are order-independent usually use bullets, not numbers.)
- Steps are discrete and self-contained: Each step does one thing, and tells everything that’s needed to do it. (Making the reader jump to another place to do or read something, then come back and resume the procedure, is terrible technique!)
- Procedures should give advance warning of hazards and potential problems so the reader is prepared for them and knows what to do.
- Writing good procedures requires “route planning” and “defensive driving” techniques.

Writing a Procedure

Procedures, like everything else, should be developed in a logical, audience-centric manner.

Preparation:
1. Read the instructions or otherwise find out exactly what you should be doing.
2. Think about the overall task. What will it accomplish, and who will be doing it? (Example: If giving instructions on driving from LBCC to the Rt. 22/I-5 interchange in Salem, mentally picture a map with Albany and Salem on it.)
3. Think about the different ways to accomplish the same objective (Highway 34 to I-5, Highway 34 to Highway 99 to Highway 22 to I-5, etc.). Using the audience definition, the exact objective, and the overall context, and any other criteria, choose one “best” way.
4. Mentally dry run all the steps, identifying choices and potential hazards. (If taking Highway 34 to I-5, be sure to take the I-5 Northbound on-ramp. Don’t exit at Knox Butte. Be aware of the speed trap always sitting at mile marker 241. Etc.)
5. Never surprise your reader. Determine any required materials, tools, prior knowledge or experience, and other prerequisites. List them right up front. If warnings or cautions are needed, give them far enough ahead that the reader can act on them.
Recording:
6. Actually perform the procedure, carefully recording every step. Make note of choices and hazards, and how to navigate them successfully. Note: More choices and hazards will always present themselves in the real run-through than you can ever imagine in step 3, so never skip the real run-through!
7. As you perform each step, actively look for ways the reader might become confused, might misunderstand ambiguous words, might do the wrong thing, might be injured, etc. Deal with those explicitly.
8. Account for the possibility of real-time, unexpected hazards, choices, emergencies, and contingencies. Give workaround or troubleshooting instructions, often as a separate section or appendix after the procedure. *(When crossing the overpass, if you see that I-5 has heavy traffic, don’t get on it; turn around and take highway 99. Etc.)*

Finishing and Polishing:
9. Accurately and fully title your procedure so the readers know they are using the right one.
10. Tell the readers your relevant and important assumptions before the first step of the procedure.
11. Number steps if they must be done in order.
12. Break things down to simple discrete tasks that have a clear starting and ending point.
13. Begin steps with action verbs.
14. Don’t treat pure information as a task or numbered step, because the reader can’t “do” it. Add it to the end of the previous or current step, or insert something like a “Note,” “Caution,” or “Warning” block.
15. Use illustrations if they will help clarify, but tailor the illustrations to the purpose.
16. Use vocabulary appropriate to the task and the audience; err on the side of formality. Define new terms if the reader might not know them.
17. Avoid shortcutting by having the reader re-perform earlier steps (e.g., “Repeat steps 3-5”), unless you are absolutely certain they won’t get confused and that they will return to the correct step in the procedure when done.

Testing:
18. Proofread it, spell check it, and read it aloud.
19. Test the procedure as if you have never seen it before.
20. Let several members of the real audience test the procedure. If they do something wrong, it is not their fault – you didn’t write the procedure well enough!