CHECKLIST: EFFECTIVE INSTRUCTIONS

This checklist helps you write effective procedural instructions. It assumes that you have researched the intended audience and the circumstances under which they would follow the procedure.

DK Consulting

IS THE PROCEDURE APPROPRIATELY SCOPED?

- ☐ The procedure falls within the intended audience's role, responsibilities, and capabilities.
- ☐ The procedure stands alone as a single, repeatable set of actions.
- ☐ The length of the procedure is limited to no more than ten (10) steps.
- ☐ The procedure is connected to and logically placed within a more extensive set of procedures, as needed.
- ☐ The procedure does not significantly duplicate another procedure.
- ☐ The title of the procedure accurately reflects its scope and purpose.

DOES THE PROCEDURE MATCH THE AUDIENCE'S NEEDS?

- ☐ The procedure's format and location are accessible to the intended audience and navigable in their work environment.
- ☐ The purpose and context of the procedure are clear.
- ☐ The technical content and level of detail match the audience's experience and expectations.
- ☐ An initial section of the procedure describes any necessary tools, preparation, or prerequisites.
- ☐ The pace of the actions and of information flow meets the audience's needs.
- ☐ Illustrations, tables, charts, and videos appear as needed to assist the audience.
- ☐ The graphical and video content is appropriately labeled, including with alternative text, and called out within the procedure.
- ☐ The procedure includes appropriately placed cautions and warnings, as needed.
- ☐ The procedure includes examples only as needed, and the examples are pertinent to the audience.

IS THE ORGANIZATION LOGICAL AND COMPLETE?

- ☐ The organization of the procedure has clear starting and ending points.
- ☐ The order of the procedure's steps is logical. Each step proceeds logically from the previous step without undocumented assumptions, as meets the audience's needs.
- ☐ All required steps are included.
- ☐ No extraneous information is present.
- ☐ Each significant step is delineated with a number (if the sequence is important) or a bullet.
- ☐ Each step encompasses only one action. Very short, simple steps are combined only as clarity permits.
- ☐ Sub-steps are kept to a minimum and are clearly delineated within the relevant step.

☐ Information about a step's result appears in a separate sentence following the step or at the beginning of the subsequent step, as meets the audience's needs.

☐ Steps include time-spend and other pacing information as needed. (This information can be part of the result content.)

☐ Each step is worded so that its information flows from the familiar to the unfamiliar, as meets the audience's needs.

☐ If a step includes a note, caution, and/or warning, those elements are clearly labeled.

IS THE LANGUAGE SIMPLE AND STRAIGHT-FORWARD?

☐ Each step in the procedure is written in the imperative (or "command") voice.

☐ The language of each step aligns with the language of the intended audience, including accepted acronyms and other necessary technical language.

☐ The word choice is translation-friendly, avoiding country-specific idioms and the overuse of jargon.

☐ Each step speaks directly to the audience, using active (not passive) verbs as much as possible.

☐ Each step uses positive phrasing as much as possible.

☐ Each step is grammatically parallel to every other step, as much as practicality dictates.

HAVE YOU TESTED IT?

☐ The procedure's content meets your organization's criteria for usability, as determined by a self-check or review.

☐ New or complex procedure content has been usability tested with representatives of the intended audience in their expected work environment.

☐ All web links included in the procedure work as intended.

☐ All media embedded in the procedure load as expected.

☐ All special formatting in the procedure looks and behaves as intended.

For more tips on writing procedures, review this blog post on the DK Consulting website: https://dkconsultingcolorado.com/2023/04/30/instructions-need-a-denouement-too/.