

5 Steps FOR **STREAMLINING** **THE DOCUMENTATION** PROCESS



1 WRITE DOWN QUESTIONS OR ACTIONS AS TITLES

The two biggest barriers to writing a help article are:

- **Knowing what to write about**
- **Knowing how much information to include and how much to leave out.**

Many authors spend much more time trying to figure out what to write and how to approach the topic than they do actually writing.

If you write down actual customer questions or actions as titles then you instantly know what to write. And if you make the titles very specific, you make it easier for your content authors to know what to include and what to leave out.



2 GET EVERYONE USING THE SAME TOOLS

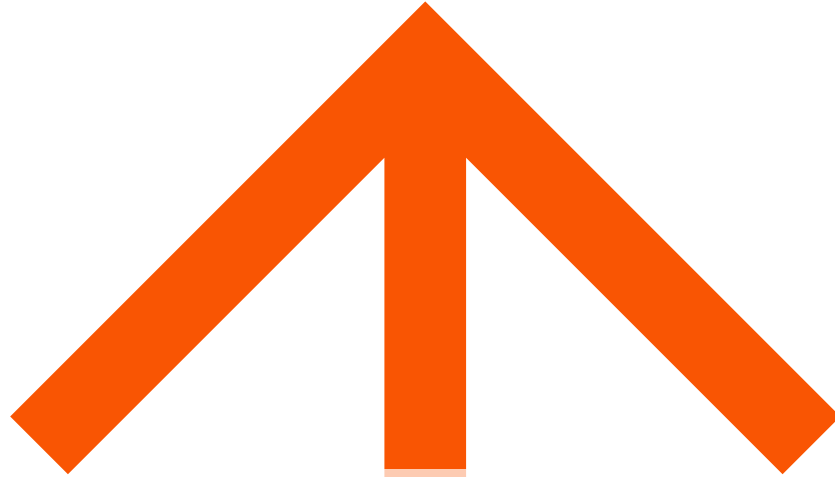
Is every writer in your organization using a different tool? Do some use Word, others Google Docs? Or do some use Print Screen and Photoshop while others use SnagIt?

Make sure that you get everyone on the same page. This becomes important for several reasons:

- If everyone uses the same tools, it is easier to collaborate
- If everyone uses the same tools, it is easier to establish "best practices" for using those tools
- If everyone uses the same tools, it is easier to update documents that have become out of date
- If everyone uses the same tools, articles will look more consistent, regardless of who authored them.

Remember, your support documentation is customer facing so the way it looks and the way it reads is just as important as your marketing website. Customers are judging your company based on how good your documentation looks.

3 REMOVE^{THE} BARRIERS TO PUBLISHING



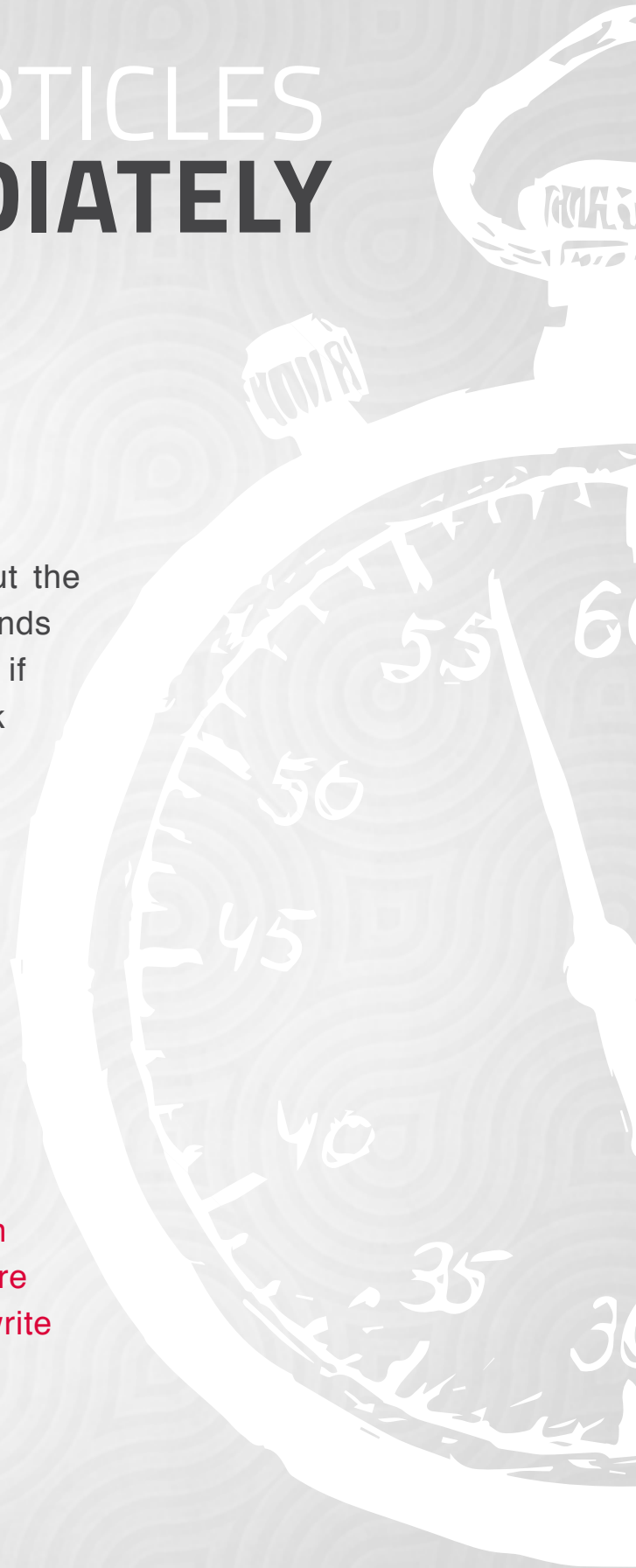
How many steps exist between finishing the authoring of an article and getting it published? Do you have to upload images? Encode video? Does your IT department or a developer have to get involved in the process? Do you have a cumbersome approval process? Do you have to manually update a table of contents somewhere?

If you have any of these barriers, then work to eliminate them by getting better tools and establishing better processes. Barriers to publishing not only take time, but they suck up energy.

4 **USE** ARTICLES IMMEDIATELY

This might seem like a strange tip, but the sooner you get a help article in the hands of a customer the sooner you will know if it really worked. That instant feedback allows you to make changes while the content is still fresh in your head. If it takes days or weeks before you get feedback on an article, it takes a lot more energy and work to dive into the article again.

By getting instant feedback you will also learn more quickly what works and what doesn't. Your team will then be able to apply that knowledge to future articles which will make everyone write more effectively.

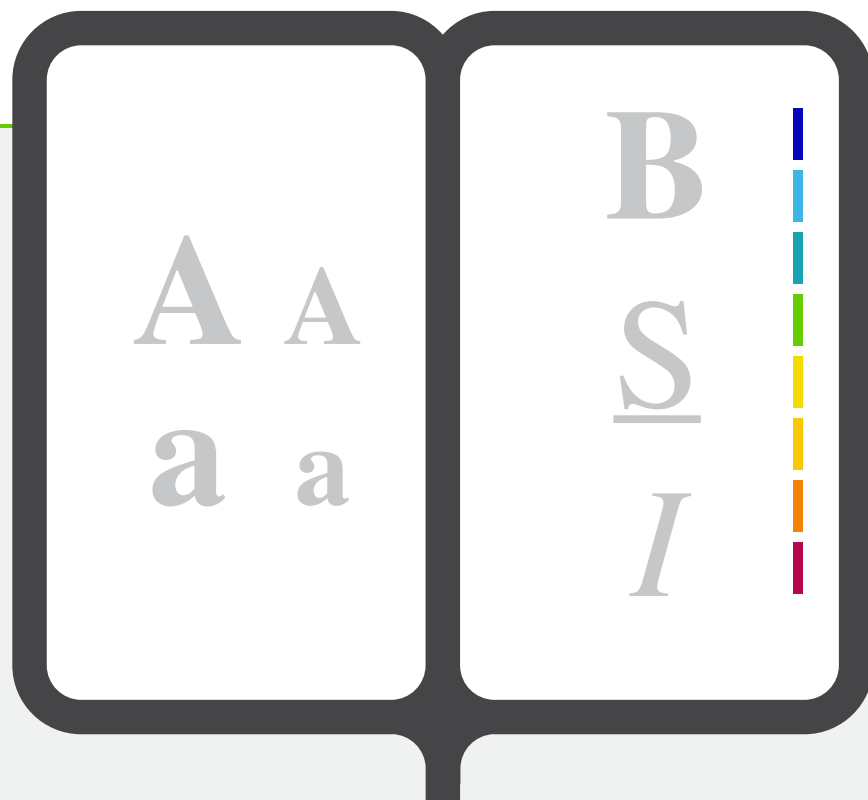


5 ESTABLISH A STYLE GUIDE



Do you **bold** text when you mention a button label? How do you **C**apitalize article titles? What color do you use for image annotations?

Establish a style guide so that everyone on your team knows exactly what is expected and doesn't have to spend time trying to remember how they should format a document.



About ScreenSteps

We hope that you have enjoyed this guide and that you find the tips useful. And we hope that you will take some time to look at ScreenSteps.

ScreenSteps is a cloud based help-authoring and knowledge base application that helps businesses support software products that are changing very quickly.

Our primary customers are:

- B2B Software companies
- School districts
- Universities
- And anyone else who is tired of answering the same support questions over and over again.

ScreenSteps combines the authoring and publishing process into a simple, integrated workflow. The ScreenSteps authoring system can support teams from 2 up to several hundred authors. It also integrates with systems such as Zendesk, Desk.com, WordPress and Help Scout.

You can learn more about ScreenSteps here: <http://www.screensteps.com>

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