

Digital Guide Checklist

Follow these three principles for creating digital guides that are easy to find, follow, and skim.
Use this checklist to evaluate and update your digital guides.

Is it findable?

Guides cover one topic/procedure

If not, break guides into smaller articles.

Titles are phrased how customers and employees ask questions

Is it followable?

There is a clear path from the first to the final step

Guide is consecutive

You don't make people jump around within the document

For complicated procedures, you use decision trees and workflows

Is it scannable?

End-users can skim your guides and still handle a procedure correctly

Instructions are concise

Remove long descriptions and text that doesn't provide directions

Language is actionable (use verbs to direct actions)

Simplify guides by using these formatting tools:

- Screenshots with annotations

- Checklists

- Bulleted or numbered lists

- Styled text (e.g. tip, warning, etc.)

- Collapsible sections

- Headings

- Highlights

- Links

Did you test it?

Watched and listened as end-users followed your guides

Made notes where end-users got stuck or were confused

Confirmed end-users can perform a job while following the guide without the need for additional explanation

Updated guides for clarity