

How to create a quick start guide

May 2020

Make it Clear

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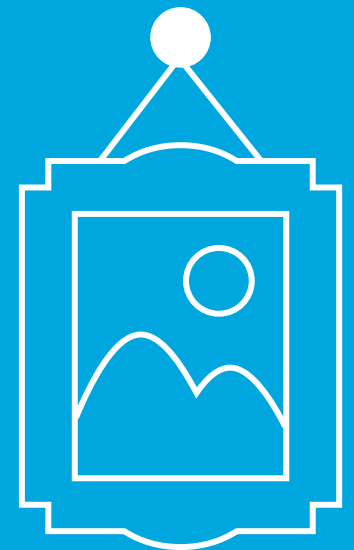
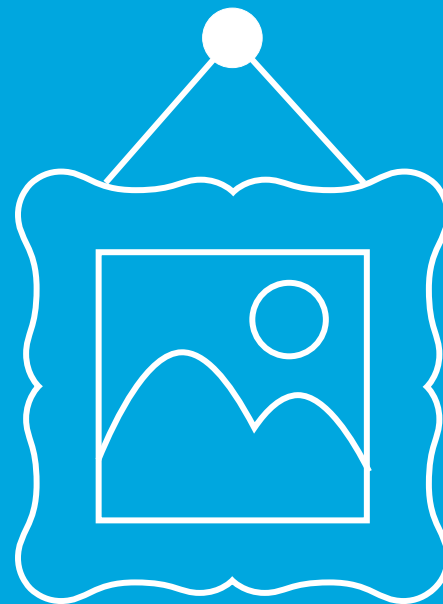
This 'how to' guide details everything you will need to consider when creating your own quick start guide; from why and where it can help, to how you should approach the creation process.



What is a quick start guide?

A quick start guide (QSG) helps the user to get started with a product or service that they've bought.

A succinct set of instructions, they are often supplemented with icons and imagery to help guide the user to a successful set up and first-time use.



The benefits of quick start guides

Improve clarity and understanding

A QSG gives the customer all the information they need to set up and use their new product or service properly.

It can help prevent confusion and improve the experience with a new product or service.

Reduce costs and resources

An excellent guide saves the business time and money by reducing the need for in-person expert assistance, such as installation engineers.

It decreases the volume of customer service calls and the amount of time that the customer may have to spend seeking help with their installation and set up.

Empower the customer

By reducing the need for additional help, the customer does not need to schedule and wait for installation engineers or outside assistance.

This can be inconvenient and incurs both direct and indirect costs, both for the customer and the business. The customer can complete their setup and combat many problems in their own time, without the additional cost of help from experts or customer service.

Increase understanding of the new product or service

By going through the process of self-installing, the user now has a rudimentary understanding of how their product works, which can provide some context for them to fall back on and reassure them in the case of a future problem.

Support future problem solving

The QSG also gives the business the opportunity to present supplementary information to support the user, in advance of future issues.

The user may absorb more information about their new product than they immediately realise by reading the quick start guide.

Contribute to the overall experience

By reducing the stress and cost that the user may experience when booking an installation engineer, the company is creating a better user experience for the user.

If the guide is well written, carefully thought out and sufficiently descriptive, the user can have a smooth, quick set up immediately. This improved experience can help to cultivate brand loyalty, increase sales from existing customers and encourage users to become brand advocates.

A good guide can reflect well on the company

Lastly, the quick start guide can reflect the company brand identity and purpose, showcasing how they treat their customers and how they stand out from their competitors.

It can influence what the customers and end-users think of that company, supporting their image and providing instructions that are testament to their commitment to, and care of, their customers.

10 tips for creating a quick start guide

1 Identify the objective(s)

What problem does your quick start guide help the user to solve?

Your guide may need to cover multiple setup scenarios. It is important to identify the objectives for creating it and the problems that it solves before starting to write it.

This will help you to ensure that the QSG continues to align with its purpose throughout the creation process.

2 Show don't tell

Have you considered imagery and visual indicators?

Users may depend on illustrations or imagery to understand the part of the equipment they should be using and how to complete the actions. Including imagery in the steps creates a QSG that is accessible to more users; ensuring that readers of all abilities can comprehend the steps they need to take by observing the imagery.

Adding visual indicators, such as icons and colours, can tie sections or steps together or make them stand out, helping the user to identify what type of content it is or what type of action is required.

3 Define the scenarios

Do you know what they will be thinking or feeling?

In order to cover and explain everything required to solve the problem, the guide must consider the user perspective and the writer should imagine what it is like for the user; especially their likely environment, level of understanding, situation, emotions and thoughts around the problem.

Consider the format of your quick start guide; would a video or walkthrough suit their needs more effectively?

4 Research the user

Do you really know your user?

Before you start to write your guide from the assumed perspective of your user, carrying out research into the user and scenario will help you to understand what they are thinking or feeling at the time of reading the QSG.

This can inform the language and the content used. It will also help to ensure that you cover every aspect or piece of information that a user may need during the process. Research activities that are useful for this stage are interviews and focus groups.



5 Assume a low level of understanding

Quick start guides are written to help guide non-technical individuals to a setup solution.

It is best to not assume that a user will understand something, even if you consider it a basic function.

Address the user and explain every aspect thoroughly, imagining that they have no prior knowledge or understanding about the product.

Additionally, assume your user will not read the instructions in the order you intend them to and may not have picked up on the context by reading a previous section.

6 Add headings and timings

Have you clearly separated the steps of your guide?

Creating clear, succinct headings that summarise the step in the process allows users to quickly ascertain whether that step matches their progress.

Adding a time scale to each step, or sequence of steps, can help a user to accurately estimate the time it will take them to complete the setup process.

7 Keep it simple, but descriptive

A QSG guide should be simple and succinct but simultaneously descriptive and add context where it needs to.

The language should be positive, but not patronising. Technical language should be avoided wherever possible and any necessary terminology or acronyms should be explained wherever your user will encounter them.

What is required for each step or situation can be ascertained by user research.

8 Be clear and consistent

The design and the language of the guide should be clean and clear, adhering to the brand tone of voice and optimised to improve the readability of the guide.

In order to create a good user experience and easily understandable guide, ensure that terminology, design elements, imagery, iconography, colours, heading structures or styles and copy are consistent throughout.

9 Test with real users

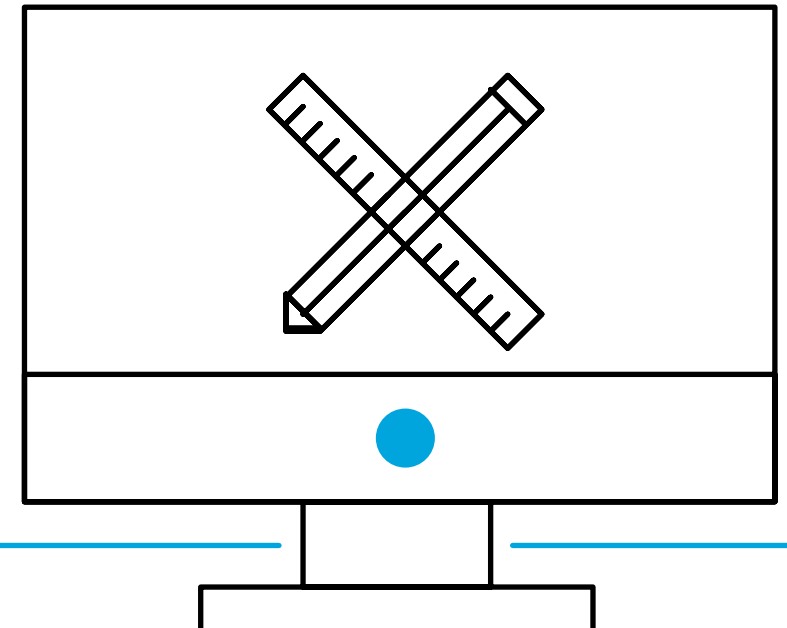
Have you checked that your quick start guide is helpful to the user?

Before you publish your guide and celebrate completing a valuable project, user testing will confirm that the guide solves the problem, fulfils your objectives and helps the user without adding to their frustration.

10 Keep the content up-to-date

Last but by no means least, quick start guides are only useful if they are accurate, up to date representations of the product or service.

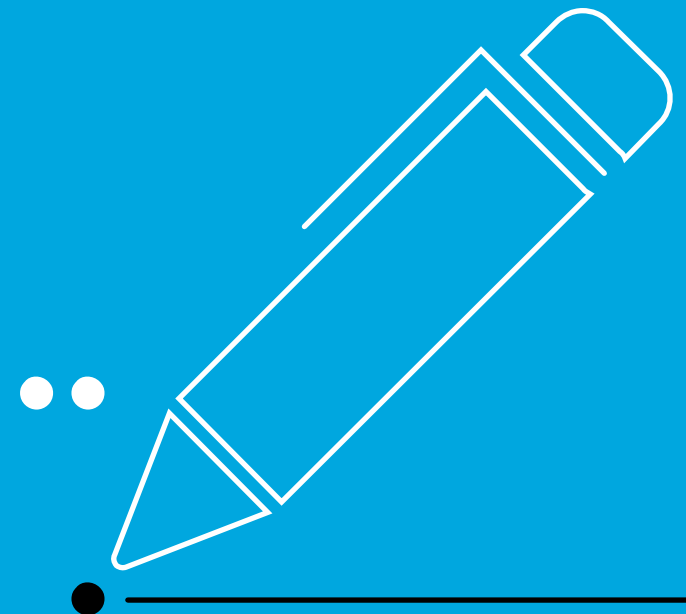
Update your guide when there are changes to the product or service.



The Make it Clear quick start guide process

We follow a four stage process for all our work - Definition, Solution, Implementation, and Optimisation. The activities at each stage differ depending on the project, however they always include some form of objective setting and initial research, conceptual design solutions, testing and the production of final designs that are either built by development teams or printed to be shipped with products.

We've outlined the key activities we undertake as part of the process to create a quick start guide. This includes tips to ensure your QSGs are fit for purpose and considerations around maintaining and updating your new product documentation.



Definition

We take an evidence based approach to everything we do. This means understanding our client's business, their audiences and the context in which they interact.

Objectives

As with every project, we first define objectives, discuss the challenges, what success looks like and what the key metrics should be.

Ideally the success metrics should be based on existing benchmarks such as NPS score, customer service calls or engineer call outs.

- Set objectives
- Benchmark success metrics

Audience definition

One of the most important activities within the definition stage is to define the target audience that will be using the quick start guide.

We then outline the potential scenarios the quick start guide needs to support. In some cases, different variations of the guide may be required.

Scenarios could include variations in the combination of products and services a customer has purchased, new product upgrades or, as we've seen with internet providers, a guide to help customers as they move home.

- Define audience
- Outline set up scenarios



Existing content audit

Many of the quick start guide projects we work on have some form of existing guides or product set up information.

We spend time reviewing how the current process works and looking at ways to improve it.

This includes familiarising ourselves with the product, setting up processes and the key information required for a customer to get started quickly.

- Review existing materials

Research

Once we have a good understanding of the product and any existing information, we conduct research.

The level of research differs from project to project, but as a minimum we would cover the following activities: stakeholder interviews, competitor review, customer observations and a survey to collect quantitative feedback.

Each of these activities serves a specific purpose that can help to uncover insight into challenges and opportunities for improving the customer experience with the quick start guide.

- Stakeholder interviews
- Competitor review
- Observational research
- Customer survey

Reporting and recommendations

Following the research, we produce a report that details the findings of the activity and outlines recommendations and considerations to inform the success of the project.

Generally, our research report for a quick start guide will include comments on the existing materials and customer challenges.

This may cover suggestions on the most suitable format(s) for the quick start guide, the level of information required and the order in which that information should be delivered, noting any areas of potential confusion that should be highlighted.

- Research findings
- Quick start guide recommendations



Solution

We work in close collaboration with our clients to produce design solutions that support customers and deliver results for the business.

Guide structure

Quick start guides help customers install or set up a product or service, removing the need for customer service or engineer support.

Relevant information must be communicated clearly and at the right time. To set expectations, start by outlining the equipment and steps a customer must take to get set up.

This can be a bulleted list, but it must include sufficient details. Usually quick start guides are printed, however if you're creating guides in other formats, such as video or in-app, consider how the way you present content might need to change.

- Basic guide structure

Wireframes

Here we build out the guide structure into a basic visual map, outlining the flow of content and considering supporting elements that need to be included.

The wireframes will ultimately form the basis of the final guide layout so it's important to spend time working on different options and, if possible, testing with customers.

- Wireframe guide



Design concepts

Once we're happy with the wireframes, we then create visual concepts for how the final design could look.

This includes use of photography, icon styles, colours and any other relevant supporting elements.

Generally we produce 2-3 concepts and review with the client. In most cases, our concepts are informed by existing brand guidelines.

As quick start guides are a crucial part of the customer journey, it's key that they make sense and fit cohesively with any other communications or brand assets.

- Visual design concepts

Testing

We advise testing as much as possible with real customers.

This may not always be possible, so as a rule we aim for at least one round of testing to assess the visual guides. This includes a report and recommendation on areas of both strengths and weaknesses, along with recommendations on improvements.

- Testing report and recommendations

Revisions

Based on the findings of the user testing and feedback from our client we work iteratively to finalise the quick start guides.

Once approved by the client, we move to the implementation stage.

- Finalised guide designs



Implementation

We work closely with the appropriate client teams to properly plan and execute the implementation phase in a cost effective and efficient way.

Artworking

Once the designs are approved, they are handed over to our artworking team for final checks.

Depending on the format of the guide the artwork process may vary – print files are different to assets for a website. In all cases, the artworking stage includes setting up processes to ensure quality and consistency throughout.

This is the last chance to check everything is correct, especially with printed guides where you can't make changes once they've been produced!

Production

Whether print or digital, we provide support throughout the production process.

From quality checks to advising on the type of paper or using sustainable inks – choices made in production are treated with the same level of consideration and quality as the information in the guides themselves.



Optimisation

Any solution is only as valuable as the results it delivers for our client; we work with client teams to establish appropriate measurements to track the impact of our outputs. This could include tracking NPS scores or the number of customer service calls.

Results gathering

Following launch, we work with our client to conduct research often in the form of surveys and observations which help track the success of our design solutions.

The feedback is used to inform ongoing improvements and helps us monitor what works and what doesn't for our client's customers.

Guide management

From inventory control to software updates, the quick start guide process doesn't end when the first version of the guide is finalised.

In our experience, quick start guides need to be regularly monitored and updated – often due to technical improvements or even a new version of the product being launched.



What can we do to help?

Make it Clear helps global organisations achieve clarity with data-driven design.

Our research-led approach to creative solutions, from marketing campaigns and event support to user experience design and brand strategy, helps our clients address fundamental communication challenges, whilst improving engagement, driving revenue and reducing costs.

If you're interested in creating a quick start guide, get in touch today by emailing: freya.wallace@makeitclear.co.uk

Thank you



Make it Clear

2nd Floor, 101-102 Turnmill Street,
London EC1M 5QP

+44 (0)20 3058 1100
Info@makeitclear.co.uk

www.makeitclear.co.uk

dba member