

CHAPTER 12

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Writing Instructions and Procedures

CHAPTER OUTLINE

Instructions, Procedures, and Your Job

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Assessing and Meeting Your Audience's Needs

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Using Visuals Effectively

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Writing Procedures for Policies and Regulations

Some Final Advice

Clear and accurate instructions and procedures are essential to the world of work. Instructions tell—and frequently show—how to do something: perform a specific task (draw blood; install new software); operate a machine (a pH meter); construct, install, maintain, monitor, adjust, or repair equipment (an incubator; a scanner).

While the purpose of writing **instructions** is to explain how to perform a task in a step-by-step manner, the purpose of writing **procedures** is slightly different. Often the two terms are incorrectly used interchangeably. **Procedures** refers to policies, duties, protocols, and guidelines that a business or organization expects its employees to follow.

INSTRUCTIONS, PROCEDURES, AND YOUR JOB

As part of your job, you may be asked to write instructions and procedures, alone or with a group, for your co-workers or for your customers who use your company's services or products. Your employer stands to gain or lose much from the quality and the accuracy of these documents you prepare. Well-written instructions and procedures are important because they ensure safety and efficiency at your workplace. They help you and your colleagues

- assemble a product
- know what problems are present in a process
- carry out the duties your employer expects

This chapter will first show you how to develop, draft, illustrate, edit, and design a variety of instructions. Then it will move into a discussion of writing procedures about job-related duties.

WHY INSTRUCTIONS ARE IMPORTANT

Perhaps no other type of occupational writing demands more from the writer than do instructions because so much is at stake—for both you and your reader. The reader has to understand what you write and be

able to perform the steps. You cannot afford to be unclear, inaccurate, or incomplete. Instructions are significant for many reasons, including safety, efficiency, and convenience.

Safety

Carefully written instructions get a job done without damage or injury. Poorly written instructions can cause an injury and may result in costly damage claims or even lawsuits. Notice how the product labels in your medicine cabinet inform consumers how to take a medication safely. Without those instructions, consumers would be endangered by taking too much or too little medicine or by not administering it properly. To make sure your instructions are safe, they must be

- accurate
- consistent
- thorough
- clearly written
- effectively illustrated
- carefully organized

Your instructions also have to be legally proper. Companies have a legal and ethical obligation to prepare instructions that protect readers' safety. Instructions must

- specify what constitutes normal and proper use
- warn about misuse and identify potential risks and hazards
- signal any cautions, risks, or dangers through prominently displayed symbols, warnings, and cautions
- inform readers how to obtain further help

Failure to provide such information in plain, clear language that readers can understand and easily follow is regarded by the courts to be as serious as manufacturing a defective product or not meeting code specifications. Several government agencies such as the U.S. Consumer Product Safety Commission (www.cpsc.gov) notify consumers about products that have been found to be unsafe.

Efficiency

Well-written instructions help businesses run smoothly and efficiently. No work would be done if employees did not have clear instructions to follow. For example, without instructions on how to operate a piece of equipment, employees would not know how to get a job done. Imagine how inefficient it would be for a business if employees had to stop their work each time they did not have or could not understand a set of instructions. Equally alarming, what if employees made a number of serious mistakes because of confusing directions, costing a business sales, decreasing productivity, and increasing expenses? Giving readers helpful tips to make their work easier will increase their efficiency in doing it.

Convenience

Clear, easy-to-follow instructions make a customer's job easier and less frustrating. Instructions reflect a product's or service's quality and convenience. They can create goodwill or destroy it. How many times have you heard complaints about

a company because its instructions were hard to follow? Poorly written and illustrated instructions will cost your customers time and you their business. Customers want instructions that are written in clear, plain language and that use helpful photographs or drawings so they can assemble, install, or use a product right away. Instructions are also a vital part of “service after the sale.” Owners’ manuals, for example, help buyers avoid a product breakdown and help them keep the product in good working order.

THE VARIETY OF INSTRUCTIONS: A BRIEF OVERVIEW

Instructions vary in length, complexity, and format. Wordless instructions such as those in Figure 12.1 from an airline safety card can be quickly understood by a large international audience. Other instructions are one word long: *stop*, *lift*, *rotate*, *print*, *erase*. Others are a few sentences long: “Insert blank disk in external disk drive”; “Close tightly after using”; “Store in an upright position.”

Instructions can be given in a variety of formats, both in print and online, and can include

- numbered steps (see Figures 12.2; 12.3, page 484; and 12.4, page 485)
- bulleted steps (see Figure 12.4)
- concise paragraphs (see Figures 12.2–12.4)
- online instructions (see Figure 12.4 and Figure 12.9, pages 500–509)

You will have to determine which of the above formats are most appropriate for the kinds of instructions you are to write.

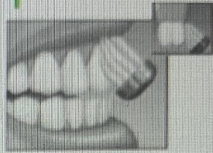
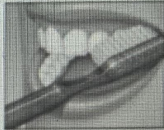



Many instructions are given online. If you purchase a new iPad, for instance, online instructions will guide you in setting up and registering it. Figure 12.4 shows a set of instructions posted online to help its customers repair a leaky faucet. Websites for products and services often include hyperlinks to “help screens” that give consumers information on assembly and use. The long set of instructions on installing the Epson WorkForce 610 series printer in Figure 12.9 combines print and online instructions.

Instructions are also provided through videos on YouTube and other sites that actually show viewers how to assemble or install a product or perform another task.

FIGURE 12.1 Wordless Instructions on How to Use an Oxygen Mask on an Airplane



FIGURE 12.2 Instructions That Supply a Visual with Each Written Step

Proper Brushing	
<p>Proper brushing is essential for cleaning teeth and gums effectively. Use a toothbrush with soft, nylon, round-ended bristles that will not scratch and irritate teeth or damage gums.</p> <p>Place bristles along the gumline at a 45-degree angle. Bristles should contact both the tooth surface and the gumline.</p>	<p>1</p>  <p><i>Uses easy-to-follow steps with ample space between each one</i></p>
<p>Gently brush the outer tooth surfaces of 2–3 teeth using a vibrating back and forth rolling motion. Move brush to the next group of 2–3 teeth and repeat.</p>	<p>2</p>  <p><i>Clear, numbered visuals help readers follow directions</i></p>
<p>Maintain a 45-degree angle with bristles contacting the tooth surface and gumline. Gently brush, using back, forth, and rolling motion along all of the inner tooth surfaces.</p>	<p>3</p>  <p><i>Begins each step with strong, active verbs listed in color</i></p>
<p>Tilt brush vertically behind the front teeth. Make several up and down strokes using the front half of the brush.</p>	<p>4</p>  <p><i>Offers helpful hints</i></p>
<p>Place the brush against the biting surface of the teeth and use a gentle back and forth scrubbing motion. Brush the tongue from back to front to remove odor-producing bacteria.</p>	<p>5</p>  <p><i>Explains why a step is important</i></p>

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In these online instructions, someone talks you through each step, alerts you to potential problems, and gives helpful tips at various stages of the process. One smoke detector manufacturer, for example, hired a New Jersey fire chief to demonstrate how to properly assemble, locate and mount, maintain, and test its product.

FIGURE 12.3 Instructions in a Numbered List

Uses numbered steps

Strong, active verbs give readers clear directions

Provides photograph to assist readers

Inserts "CAUTION" statement at proper place

Tells reader how to determine if he/she did step accurately

How to Copy Files to a USB Flash Drive from Your Laptop or Notebook

Follow these instructions to copy your files to a flash drive from your laptop or notebook. As you perform these instructions, refer to the photo of a USB flash drive below:

1. Insert the USB flash drive into a USB portal of your laptop or notebook.
2. Find the folder or file to be copied to the USB flash drive, and right-click on it.
NOTE: The folder or file will be highlighted, and a menu with "Open" at the top will appear.
3. Within the menu, move your cursor down to the "Send To" option. Here you will see a list of locations where you may send the selected folder or file.
4. Choose the USB flash drive location. Your folder or file will be automatically copied over.
CAUTION: DO NOT REMOVE THE USB FLASH DRIVE AT THIS POINT, OR YOU WILL RISK DAMAGING IT.
5. Go to "My Computer" from the "Start" menu, and double-click on the USB flash drive. If the folder or files you selected in Step 2 are listed here, your copying was successful.
6. Eject the USB flash drive before removing it from the computer. To do so, go to "My Computer" again, right-click on the USB flash drive, and select the "Eject" option from the menu.
7. Remove the USB flash drive from the USB portal.



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ASSESSING AND MEETING YOUR AUDIENCE'S NEEDS

To assess your audience's needs, put yourself in your readers' position. Do not assume that your readers have performed the process before or have operated the equipment as many times as you have. (If they had, there would be no need for your instructions.) No one who has written a set of instructions ever disappointed readers by making directions too clear or too easy to follow. Remember, too, that your audience will often include non-native speakers of English, a worldwide audience of potential consumers. The more you know about how and why your reader will use your instructions, the steps likely to cause problems, and the background information you need to supply, the easier and clearer your instructions will be to follow.