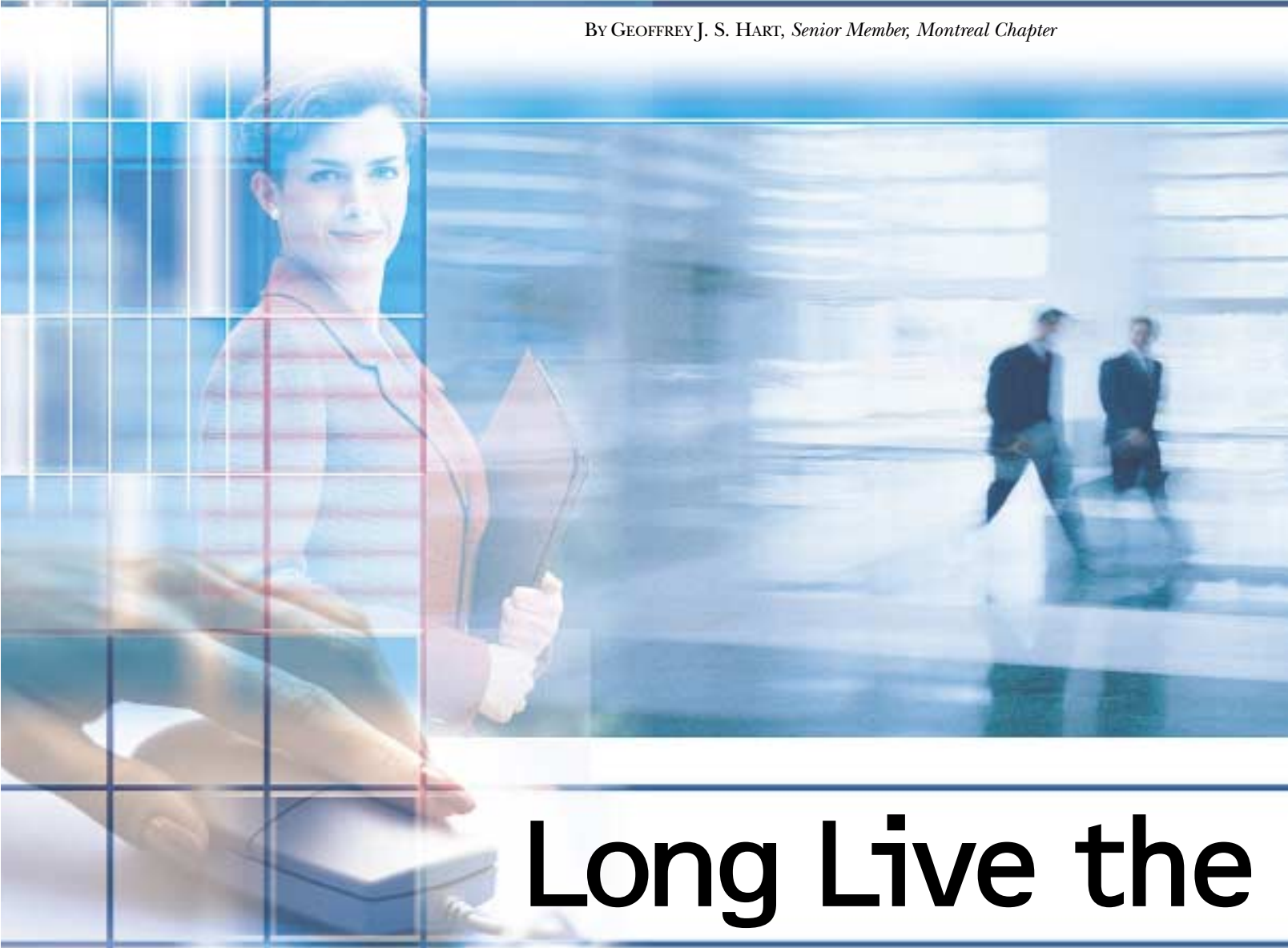




The Style Guide

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Long Live the

Nobody would really contend that printed style guides are dead—they're still with us and still useful. Yet there's no doubt that printed style guides are looking a little antiquated these days. Despite the valuable information they contain, they are simply too static—and cumbersome—for most writers and editors to use regularly. But if you're thinking that online style guides are

inherently better solutions, think again: Finding information on the computer is certainly easier, but simply moving a paper guide online only exchanges one form of "static" for another.

So what's the solution? Make the guide dynamic. Take advantage of your computer's technology to develop a system of templates, macros, and reference materials that actually *guides* writers through their work.

is Dead



reports how writers actually use words, or a proscriptive philosophy that describes forbidden usage patterns. The best style guides adopt a mixture of both approaches.

It's unlikely that any commercial guide covers all the style issues your company encounters, so most companies create their own style guide. (If your company doesn't have its own style guide, see either of the two excellent bibliographies of technical communication resources in the Suggested Readings section. Pick a commercial guide that appears to be most relevant to your industry, then build on it.) Every organization has different communication needs, and even when a comprehensive published guide covers 90 percent of those needs adequately, other resources must cover the remaining 10 percent. A custom style guide can bridge the gap. But a dynamic guide does more: It actually puts the contents of the guide to work.

You don't want to throw away your printed or online style guide—it's an important reference tool. But you can integrate the guide with the tools and processes your organization uses to produce its communication (whether in print or online). You can embed style and formatting in a template, or create macros for common tasks. *That's* what makes the guide dynamic.

Developing a Strategy

Before creating a dynamic style guide, you must develop a strategy that is appropriate for your organization's communication products and meets their style needs. Begin by identifying the main types of communication your organization develops: These may include technical reports, data sheets, user manuals, marketing materials, business letters, online help, Web pages, or even speeches and presentations. Some style issues will be common to all these products, whereas other products may be sufficiently complex that they require their own style guides. For my current employer, I created separate guides for writing our reports and for creating our graphics and presentations. It's really not more difficult to create multiple guides; you simply need to analyze each guide's requirements separately.

Dynamic Style Guide

Philosophy of a Style Guide

Any style guide—printed or online—should undertake certain goals. Style guides ensure consistency of voice and language throughout an organization's external and internal documents. Style guides contain well-organized, effective solutions for recurring problems. Guides provide these solutions in the same way dictionaries do: They follow either a descriptive philosophy that

As in any other technical communication project, you must know your audience and its needs. In this case, your audience includes all the writers who create each type of communication product. They can help you develop a list of the most serious and frequent problems they face in their daily work—and you should try to solve these problems first. Furthermore, information gleaned from usability tests, audience analysis, techni-

cal support databases, and training staff will focus your attention on the aspects of style with the greatest payback in terms of customer satisfaction. Your editors, marketers, technical support staff, and trainers can provide additional advice on the kinds of things writers must do to satisfy your own internal audiences (e.g., management reviewers). Ask managers, peer reviewers, and anyone else who approves your communication products to identify the style

take advantage of three types of tools that you can create on your computer:

- Templates
- Macros and other shortcuts
- Reference tools

Templates


Many style guides contain elaborate descriptions of the typographic specifications for various types of reports, and checklists of the types of material to

their contents. Instead, writers must save the file under a new name, thereby leaving the original template intact for others to use. Because the formatting information is part of the styles you've defined within the template, writers do not need to be familiar with the details of the format: They simply *use* the format. That's a good first step toward making those styles dynamic, but you can do better than that. One possibility is to develop a template full of textual prompts that guide the writer through the steps of creating the text.

Upon opening the template in their word processor, writers immediately see these prompts. For example, the first line in the document, formatted using the "Title" style, might read, "Type the title here." The text reminds the writers that they need to type a title at this position, but more important, the writers don't have to remember the name of the style they must apply: The title field is already formatted correctly. To insert the actual title, writers need only select the prompt's text and type the title, thereby replacing the prompt with the correct information. (The static version of your style guide should still include an appendix that lists the names of the styles and what they are used for so that writers can reuse the styles consistently in other forms of communication. Plus, if disaster strikes, you can use the printed guide to rebuild the template.)

In some cases, the prompt may be more instructive. For example, a prompt might read, "Procedures. (If you have more than one procedure to document, copy and paste this heading below as necessary. Replace this prompt with the name of each procedure.)" Beneath that prompt, an additional prompt might read, "This is step 1 in the procedure." The basic principle, which you can use throughout the template, is to provide text already formatted in the correct style that tells writers what to insert at that location.

Where certain main headings or "boilerplate" text are standard for a type of document, you can include this text in the template so that writers won't have to insert it in each version of the document. If the standardized language requires minor tailoring for different document versions, you can provide detailed prompts that tell authors what



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problems they face. Combining all this knowledge will let you create a list of challenges to address.

Some challenges lend themselves well to the types of dynamic solutions I'll discuss below, but others don't. Add the latter to your static style guide, or solve them with more creative approaches. (See the sidebar for an example of a creative approach.) For problems that appear amenable to dynamic solutions, you can

include in each. But it's easier for everyone if you provide a word processor *template* that already contains this information.

A template is a special kind of word processor file that stores important formatting information, such as the style names used in the document, the page size, and shortcuts such as macros (which I'll discuss in the next section). Most word processors protect template files so that writers can open them but not change

to include and how to include it. For example, the disclaimer section at the end of a technical report might read as follows: “Mention of product names does not constitute an endorsement by Geoff-Co.” An additional prompt might read, “If there is a risk of personal injury, add the following text: ‘Use of this product in any manner other than that described in these instructions may cause injury.’” If there’s no risk of injury, the writer simply deletes the prompt and the disclaimer that follows it.

The same approach works well to remind writers what to include in various sections of a report. For example, the prompt for a document’s introductory section could read, “The first paragraph of the introduction should describe the purpose of the report, why that purpose is important to the reader, and who is responsible for fulfilling that purpose. In the second paragraph, explain the context in which the reader will work, and note any particular safety hazards. The third paragraph is our standard disclaimer, which we’ve provided below.” You’ll have to tailor the level of detail and the sophistication of the prompts to the needs and preferences of your authors; putting in too many details will annoy more experienced authors, whereas newer authors require more hand-holding.

Complex documents require a correspondingly sophisticated approach. For example, most word processing software automatically defines which style to use after the writer hits the Enter key. Paragraph styles usually follow headings and other paragraphs, whereas bullets or numbers automatically continue when the writer hits the Enter key. Such lists are a little trickier, because you have to include a prompt for the paragraph that follows the list (so the writer doesn’t have to figure out what style to use), but it’s easy enough to include appropriately formatted text that reads, “This paragraph follows the preceding list.”

This approach makes it easier to remember what styles to apply to various text elements (that is, the writer can look at an existing paragraph to find out what style

was used for that type of paragraph) and helps authors plan their writing process. By examining a template, they can see what elements they need to include, and can use them as a “checklist” to ensure that they cover each required component.

Your template can even encompass your organization’s review process. For example, the template might include a line at the end of the file that instructs the author to forward the document to the editor or a macro that does this auto-

Non-technical Approaches

Not all style issues lend themselves to technological solutions, but neither do you have to resolve them with a static style guide. For these types of problems, one of the better dynamic approaches involves direct interaction with the writers. Instead of simply providing a static word list that explains the differences between commonly confused word pairs (and spending fifty minutes per month fixing such errors), invest five minutes to explain the differences to each writer who has a word-reversal problem. If the problem is widespread, hold an information session at a staff meeting or organize an informal lunch so you can spend that five minutes only once. Make it fun, and people are more likely to participate and learn. Building relationships with your colleagues, though not formally part of any style guide, helps make you an integral part of the writing process; it’s always easier for writers to call the editor than to hunt through a static style guide. (Evidence from several sources shows that this is how corporate users work with many manuals: First, ask a smart friend, then turn to the manual only if the friend can’t answer the question. People are likely to apply the same technique to style guides.)

matically. A dynamic style guide could create a different template for each type of communication your organization produces, with notes on how it differs from other communications.

If your needs are truly demanding, it may well be worthwhile investigating Standard Generalized Markup Language (SGML) tools. SGML-based document production has been around for years, but it remains far less common than

other forms of word processing: SGML is more difficult to learn and imposes a more “rigid” (i.e., structured) style of creating documents than some writers are comfortable with. Furthermore, the authoring and formatting tools tend to be expensive, and many companies are hesitant to invest in them despite the potential paybacks. You can, however, achieve a reasonable compromise between power and complexity using the template approach I’ve proposed.

Macros and Other Shortcuts

You can further tweak your template through shortcuts such as macros or “wizards” that walk writers through the process of filling in required information as soon as they open the template. Most word processing software includes options for creating macros, and if you’re comfortable with computer programming, or have a friend among the developers willing to work with you, you can develop a sophisticated “wizard” that guides someone through a series of predefined steps.

A macro replaces a series of keystrokes with a single menu choice, toolbar icon, or keyboard shortcut. (For the sake of brevity, I’ll label all such shortcuts, including wizards, “macros.”) The good news is that for most purposes, there’s no need to learn a complex programming language, since most software lets you “record” macros; that is, the software records your keystrokes and menu choices so you can reuse them. You can accomplish surprisingly powerful things in this manner, though you may eventually need to learn some of the macro language to fine-tune what the software recorded for you.

Macros and wizards have considerably more power than simple templates because they actually *do* things to reduce the writer’s workload. A simple task analysis of the way your writers write should reveal all kinds of repetitive steps that you can automate for them. For example, if they routinely add chapters within a file as developers add new features to the product, you can create a macro named “Add chapter” that inserts the complete tem-

plate for a new chapter at the current cursor position. If your style guide mandates the use of standard boilerplate text for certain purposes, and the text is stored somewhere on the network, you can create a macro that searches through the network hierarchy, finds the correct file, and inserts it. In some cases, the software can even check whether the original file has changed and update the inserted text with the most recent version of the file every time the writer opens the document.


enhance the original behavior of the command. For example, the “save document” keystroke (usually Control-S in Windows and Command-S on the Mac) normally does nothing more than save the document in the active window. By creating a macro that uses this same keystroke, you could update the table of contents, update certain fields (e.g., calculations in tables), replace all double spaces with single spaces, run a spelling check, and so on... *every time the writer saves the file.* If

project by posting updates in that file? Sure, you could just send an e-mail message, but e-mail is easy to ignore or inadvertently delete; a dialog box that appears whenever the writer opens a project file is much harder to ignore. Or you can create custom macros to help each writer solve particular stylistic problems. For example, if passive voice is a problem, you can easily identify the most common problem phrases (e.g., “was done”) and run a macro that changes their color to highlight the problem. The writer can now easily find the phrases and reword them if necessary. If your style guide states that certain phrases are illegal, provide a custom macro that searches the entire file for these phrases and replaces them with the officially sanctioned replacement phrases (e.g., to change “on the basis of” to “based on”).

For macros to be part of a dynamic style guide, writers will have to actually use them. That means you’ll need to tell your writers that the macros exist, and take the time to show them how to use the macros. That personal contact also provides an excellent opportunity for a reality (and usability) check: You can watch the writer use the macro, and look for any problems or inefficiencies that should be corrected. With a little fine-tuning, the macros will be sufficiently useful that you won’t have to persuade writers to use them. You may even get suggestions for additional macros.

Reference Tools

You can use built-in tools to accomplish effects comparable to macros without any programming whatsoever. Most word processors let you create personalized or custom dictionaries for use by the spelling checker, and it doesn’t take long to build a list of key words and add them to the custom dictionary. Once you’ve done so, you can make that dictionary available to everyone. For each new word that the author doesn’t have to click to accept (“Yes, you idiot spelling checker... that word’s legitimate!”), you’re saving your writers time. If you work in an industry with its own vocabulary, you can sometimes purchase a pre-built dictionary of that industry’s vocabulary from the word processor’s developer or a third party.



A dynamic style guide reduces mechanical labor, thereby allowing your writers to focus on the creative aspects of their work.

You can create custom macros for the various sections within a document and for the various components within each section. Armed with an understanding of the kinds of tasks your authors regularly perform, you can identify repetitive series of keystrokes or even entire tasks. Because some word processing software lets you replace existing keyboard shortcuts for menu commands with corresponding macros, you can use this feature to

your word processor links with your e-mail software, the same macro could e-mail the file to the editor so the editor can monitor progress or edit and return the file.

You can get more creative still. For example, Microsoft *Word 97* lets you create macros that execute as soon as you open a file. Why not create a macro that automatically opens a specific file on your network, so you can alert writers to changes in the scope or schedule of the

Specialized dictionaries exist for medicine, law, and foreign languages, among others. If your needs are more complex, working with a terminology management system such as Trados *Multiterm* or SDL *TermBase* can help.

The much-maligned grammar checker, though of little use to a skilled editor, can provide significant assistance to less skilled writers. Modern grammar checkers generally let you specify which rules they will use for their checks, and by turning on

or discussion groups, you can create a virtual community for all writers so they can exchange information and ask questions. This approach is particularly useful for proprietary information that you don't want to reveal to people outside your organization. If you're willing to look further afield for help, the public lists, copyediting-l (editing) and techwr-l (technical writing), are excellent resources, with a host of experts who are willing to provide suggestions. (Look for

reference material provides actual, proven solutions for various problems other writers have faced. A dynamic style guide reduces mechanical labor, thereby allowing your writers to focus on the creative aspects of their work. Of course, no matter how much you automate the writing process, writers will still encounter issues that aren't covered by any style guide. So always make it clear that, when in doubt, writers should ask their editors or colleagues for advice.

One last thing: You'll find a lot of style *guides* in the library, but you won't find many style *rules*. The best style guides recognize that there will always be situations the guide doesn't cover, and truly superior guides provide tools to help writers find solutions rather than simply providing rigid rules carved in stone. Develop a dynamic guide, and you're well on your way to creating the latter kind of style guide. ❶

SUGGESTED READING

Allen, Paul R. "Save Money with a Corporate Style Guide." *Technical Communication* 42 (1995): 284-289.

Allen, Paul R. "User Attitudes toward Corporate Style Guides: A Survey." *Technical Communication* 43 (1996): 237-243.

Caernarven-Smith, Patricia. "Aren't You Glad You Have a Style Guide? Don't You Wish Everybody Did?" *Technical Communication* 38 (1991): 140-142.

Nichols, Michelle Corbin. "Using Style Guidelines to Create Consistent Online Information." *Technical Communication* 41 (1994): 432-438.

John Renish of Seagate has provided a comprehensive bibliography of technical communication resources (including style guides) that can be found at the following address: www.prc.dk/user-friendly-manuals (Select "Literature Lists").

A list of style guides is also available on the TECHWR-L site at www.raycomm.com/techwhirl/directory/index.html (Select "Grammar and Style").

Listserv Subscription Information

Subscription instructions follow for two excellent public discussion groups (available via e-mail) on editing and writing:

	Copyediting-l (editing)	Techwr-l (technical writing)
To the address	Listserv@listserv.indiana.edu	Lyris@lists.raycomm.com
Send the message	Subscribe copyediting-l YOUR NAME	Subscribe techwr-l YOUR NAME

Leave the subject line blank. For the best results, turn off any attachments and signatures that your software automatically appends to messages.

only the rules that are most effective for each writer, you can help that writer focus on problem areas. *Word 97's* grammar checker lets you selectively enable and disable twenty-one separate problem areas (such as passive voice and use of jargon) using five different "writing styles" (including "casual," "formal," and "technical"). Although writers need to use this tool with a certain amount of skepticism, it can nonetheless help them identify problems and gradually improve their writing.

A more low-tech approach can also prove helpful. Since some writers prefer to learn by example rather than using prepackaged solutions, giving them access to good examples helps them learn. If you have access to an intranet (or can set aside a protected space on your server), you can store good examples of previously published documents. Each document provides proven examples of house style or how other writers solved particular problems. Writers even may be able to simply copy text from the sample documents and paste it directly into their current documents.

Finally, if your corporate e-mail software lets you establish distribution lists

subscription information for both lists in the sidebar above.)

How Do You Get People to Use It?

One of the sad things about static style guides is that unlike the baseball diamond in the movie *Field of Dreams*, there's no guarantee that if you build it, they will come. In fact, if your organization follows the standard pattern, many (perhaps most) people *won't* come, and the style guide will be consulted primarily by editors and diligent new employees eager to learn the ropes. But some writers will turn to the static style guide for direction. And if you keep your static guide short and simple and focus it on your writers' needs (rather than just creating a set of rules), you'll greatly increase the chance that they'll use it.

But your writers are more likely to use a dynamic style guide. Integrating the style guide with the way people work makes it easier to use the guide than to work without it. Standardized, widely available templates negate most formatting and style issues; macros and other shortcuts allow your writers to generate reports more efficiently; and appropriate, integrated ref-