

Developing a Style Guide

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While most technical writing articles and books provide great information on organizing a documentation project, they don't often tell you the importance of creating a style guide. Style guides insure consistency of voice, language, and formatting throughout your documentation. This is especially important in departments with multiple writers where the goal is to have all material read as though one person wrote it.

The decision whether to establish a style guide can be difficult for corporate writing departments. Management must decide whether it is worth the time, money, and energy to develop a customized style guide when various commercial style guides already exist. It is unlikely that any one commercial style guide covers all the style issues your company encounters, so consider incorporating your styles with a commercial guide.

Why use a style guide?

- **For consistency**
Style guides are important for maintaining consistency across all documentation. Your documents should look as though they were written by the same person.
- **To keep up with industry standards**
Industry standards change on a regular basis. Style guides help your writers keep up with the changes.
- **Because everyone has their own vision of what looks good**
Everyone has their own opinion of what the perfect document looks like, and even more have opinions of what poor documentation looks like. A style guide provides standards that everyone adheres to so documentation always has that "wow" factor.
- **To provide one form of reference for all writers**
You can't expect your writers to remember all aspects of your style from memory. They need to reference one source for the most up-to-date information.

Top reasons to create your own custom style guide

- **You may not agree with everything in a commercial style guide**
Customize the style guide with information that pertains to your specific operation
- **You have your own policy for phrasing certain things**
A style guide is not only what words to use, but a way of making phrases consistent. For example, one person may write "Click File," while another writes "Select File." Both are correct, but not written consistently.
- **To provide new writers with company-specific guidelines**
New writers to your staff need a basis foundation to follow, otherwise you will spend hours training them and editing their work to have it conform to the company standard. Writers need instant guidelines.

- **To create a reputation for publishing professional and consistent documentation**
What you will create with a style guide in place is documentation that users can depend on. End-users need the structure and formatting of one manual to look consistent with the next. Consider how confusing it would be to an end-user if one writer bolds the items you click in the application, and the next writer does not.

What should your style guide include?

- **Proper usage of approved copyright and proprietary statements for your company**
The copyright information may be different depending on the type of documentation you are producing. All the various statements can be outlined in the style guide.
- **Rules for word use when your style guide differs from the commercial guide**
For example, how do you phrase a “drop-down list”? Is it a drop-down list, selection list, or pick list? Do you want a user to “click” a menu option, or “select” it? In online Help, do you provide “Related Topics” or “See Also”? Decide which one you want to use and make entries in the style guide. This keeps various phrases consistent across all documentation.
- **Rules for formatting specific text such as buttons, menu selections, check boxes, and radio buttons**
Do you bold everything you want the user to click? What about field names and keyboard keys? Define the rules for formatting such as bold and italic type for buttons, keyboard keys, icons, menu options, field names, and so on.
- **Department processes and procedures**
Include procedures your department uses for editing, using outside print vendors, inserting graphics into documents, etc.
- **Location of templates and finished project files**
The style guide can describe the centralized location for storing templates, documents in progress, and published documents.
- **Acronyms and abbreviations**
Include acronyms and abbreviations that industry-specific. For example, in the energy industry, the acronym MWh is used frequently to describe a Megawatt hour of electricity.
- **Links to industry and internal Web sites**
References such as industry glossaries, company intranet sites, and technical communication related Web sites.

What your style guide should not include

- **Grammar rules**
We all know that in most cases, sentences should not end with a preposition.
- **Template information**
Keep your template guidelines separate from the style guide. The style guide should focus on how to write, and not how to format a document.

Develop a strategy

- **Gain support from management**
Before you begin developing your custom style guide, it is important to develop a strategy. First, gain support from management so your team has incentive to adhere to the new standards. Considering the idea of holding people accountable by making it part of team members' performance review.
- **Determine the format of your style guide**
The Microsoft Manual of Style was the foundation for the style guide developed by the technical writing team at Mirant Corporation. This book is sold with an online version in HTML Help format. Because our group agreed with the majority of the items in this guide, we decompiled the Help file in RoboHTML, and changed only the items we wanted to customize. Our compiled customized style guide in HTML Help format now resides on the network so everyone has access to the same source.
- **Select a centralized location for the style guide**
Select a centralized location, such a network drive or the company intranet, to store the style guide. This way you can update it dynamically and everyone has access to the same source. You can create shortcuts to the style guide on everyone's desktop.
- **Form a style committee**
Very important! Form a style committee to interview the intended audience, review the commercial style guide of choice, and make decisions on style issues. It is highly recommended to have a department manager or team lead on the committee.
- **Set your boundaries - determine what the style guide is not**
Set your boundaries by defining the scope of the style guide. For example, if an issue relates to how to format a Heading 1 or indenting a bulleted list by 5 points, save it for the template "how to" guide.

Get Started

- **Set up weekly meetings for the committee to discuss style issues**
Have the committee meet at the same time each week. Have an agenda in advance and keep the meetings to one hour. Assign a “keeper” to record the style decisions and distribute on a regular basis the entire writing team.
- **Inform the writing team of the feedback policy**
Inform the group of the feedback policy and which person has the authority to make the final decision (member of management).
- **Set up weekly meetings to discuss the style decisions with the writing team**
Once you begin making style decisions, keep the group informed by reviewing the decisions at weekly staff meetings. Distribute the minutes of the style committee meetings so the group has a hardcopy to review. You will receive valuable feedback, and in the process, the group will know their opinions count.
- **Be flexible**
In some cases, the team majority may not agree with the committee’s decision. Be flexible. Take votes and be willing to go along with a unanimous decision or the manager’s decision. You may also encounter strong and conflicting opinions on certain issues. Give each person adequate time to describe their suggestion and do not criticize when you don’t agree with it. Thank the individual for offering the suggestion and let them know you will consider it.
- **Interview the intended audience**
Make notes about areas of the style guide you want to change, and get feedback from your audience (technical writers, trainers, instructional designers, etc.).

Document the style guide

- **Enter the style decisions weekly**
Entering the information into your new style guide in small segments saves time and brings you to publication date sooner.
- **Back up your work**
Make sure you are working on a drive is backed up on a regular basis.
- **Keep the group informed of your progress**
Make a point to keep the group informed of your progress at weekly staff meetings, or frequent e-mail updates.
- **Consider creating a quick reference card**
While the style guide is under construction, or after the guide is complete, consider creating a quick reference card for the team. This can include the most frequently used style issues such as when to bold text, and standards on how to phrase certain actions such as “select” menu options and “click” buttons and icons.

Publish the style guide

- **Have a kick-off party at publication**
Celebrate your accomplishment. Invite the entire group and make it a party.
- **Reward people for teamwork**
Give certificates of achievement, appreciation, and other rewards for being part of the team – this can also include those people who were not on the committee, but offered feedback at the review meetings.

Going forward

- **Make a commitment to keep the style guide up-to-date**
Keep the style committee in place to keep the style guide current. Later, you may find it feasible to reduce the meetings to once or twice a month.
- **Distribute notification if the style guide changes**
Ask the “keeper” from the style committee to send e-mail messages to all team members when areas of the style guide change. Include details of what changed and where to find it in the style guide.
- **Continue weekly style review meetings**
Continue to reserve time on a weekly basis, such as staff meetings, to review style issues. It may take several weeks for the team to become familiar and comfortable with the new styles, and this is a good time for questions and answers. If you have an editor on staff, this person can determine who has full grasp of the new styles and who is struggling. Work with these individuals, or consider a short class with working examples, lab exercises, and tests.

In summary

Involve the entire department to make people feel a part of the process. Be flexible and patient with people. The earth will not come to an end if the team majority decides to use the phrase “pick list” instead of “drop-down list.” Also, every opinion counts. Welcome feedback from the team and tell them you will consider their suggestions. Never criticize anyone’s suggestions. Have fun and be patient with the process. It may take several months to complete the style guide for your company, but long term, your documentation will shine with consistency in writing and formatting.