# How To Do How-To:
# Watch Your Steps

*A-B-C. It's easy as 1-2-3. As simple as do-re-mi, A-B-C, 1-2-3, baby you and me girl.*
—The Jackson Five, "ABC"

If you've ever jotted down directions to get to someone's house, make a soufflé, use an e-book reader, repair an engine, or transplant a heart, you've written a how-to, also known as a procedure. Maybe you consider yourself a technical writer, in which case you may think you already know what you need to know about writing procedures. Maybe you consider yourself a nontechnical writer, in which case you may think you don't need to know *anything* about writing procedures.

Whatever kind of writer you consider yourself, I hope that you give this topic a chance. You never know when you'll be called on to explain how to do something. When you write a helpful procedure that makes its way to the right person in the right way at the right time, you make that person's life better.

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*A note on terminology:* Technical writers often differentiate, with good reason, between *procedures*—instructions that walk people through product functions—and *task-oriented instructions*—instructions that help people accomplish their goals, which might not directly correspond to product functions. For my purposes here, I use the term *procedure* broadly to describe step-by-step instructions of any kind.

*A note on sources:* The step-writing tips in this chapter come from a variety of sources, including writers I've known and books that you'd

never hunt down if I gave you their ISBN numbers. You couldn't pry the titles of these books out of me even with rapturous declarations of fondness for my footnotes.[144]

## Overview

You may wonder why this chapter goes on for so long since procedure writing consists of, basically, *do this, do that*. Not much to it. But when you write steps, just as when you take steps, you can fall into traps. To help you avoid those traps, this chapter describes the following strategies:

- Get clear on what a step is.
- Eliminate steps that lack action.
- Number only steps that must occur in sequence.
- Put numbered steps in the right sequence.
- Create subtasks (with substeps).
- Flag any optional, conditional, or branching steps.
- Rewrite ambiguous steps.
- Title the procedure.

After you've mastered these strategies, bring on that heart-transplant manual.

*Note:* For long pieces of writing, like this chapter, readers deserve a tell-'em-what-you're-gonna-tell-'em section (also known as an overview, an executive summary, an abstract, a preview, a *précis*, or an advance

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144. If you insist, I'll divulge my favorite sources on procedure writing:
- Sun Microsystems, Inc., *Read Me First! A Style Guide for the Computer Industry*, 2nd ed. (Upper Saddle River, NJ: Prentice Hall, 2003), 127–132.
- Gretchen Hargis et al., *Developing Quality Technical Information: A Handbook for Writers and Editors,* 2nd ed., IBM Press (Upper Saddle River, NJ: Prentice Hall, 2004), 41–44.
- Kurt Ament, *Single Sourcing: Building Modular Documentation* (Norwich, NY: William Andrew Publishing, 2003), 123.
- JoAnn T. Hackos, PhD, and Dawn M. Stevens, *Standards for Online Communication* (New York: Wiley, 1997), 271–272.

organizer). Research shows that advance organizers have "measurable benefits."[145] Textbook author Mike Markel says that advance organizers "improve coherence by giving readers an overview of the discussion before they encounter the details."[146] I recommend including advance organizers, whatever you call them (with or without bullets), in your own long pieces. To aid recognition, use the same terms in the advance organizer as you use in the piece itself. For example, the first bullet point above uses the same wording as the heading you're about to read.

### Get Clear On What a Step Is

A step is an action. A numbered step is an action in sequence. So far, so good.

### Eliminate Steps That Lack Action

A step that includes no action is not a step. In the example below, Steps 1–4 are steps. Step 5 is a point of information, not a step. It doesn't tell the cook to do anything. Every step must include a verb in the imperative mood (also known as a bossy verb), like *boil*, *make*, or *bake*. No imperative verb, no step. To fix Step 5, you'd delete its number and put the information where it belongs.

*Before:*

1. Boil and drain the cabbage.

2. Make the white sauce.

3. Layer the cabbage, the white sauce, and the cheese.

4. Bake at 350°F until the casserole bubbles.

5. **This dish won't take long to bake—maybe 15 minutes— if the cabbage and sauce are hot when you layer them.**

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145. William Lidwell, Kritina Holden, and Jill Butler, *Universal Principles of Design: 125 Ways to Enhance Usability, Influence Perception, Increase Appeal, Make Better Design Decisions, and Teach through Design—Revised and Updated* (Beverly, MA: Rockport, 2010), 18.

146. Markel, *Technical Communication*, 253.

*After:*

1. Boil and drain the cabbage.

2. Make the white sauce.

3. Layer the **hot** cabbage, the **hot** white sauce, and the cheese.

4. Bake at 350°F **for 15 minutes** or until the casserole bubbles.

Another kind of step that lacks action, like Step 5 below, is a result. Results—if they need to be stated at all—belong right in the step.

*Before:*

4. Bake at 350°F for 15 minutes.

**5. The top becomes golden brown.**

*After:*

4. Bake at 350°F for 15 minutes. **The top becomes golden brown.**

**Number Only Steps That Must Occur in Sequence**

Steps that can be done in any order (or single steps) need no numbers. Use bullets, or simply delete the numbers.

*Before:*

1. Pour yourself a glass of wine.

2. Take the cabbage out of the fridge.

3. Put on a chef's hat.

*After:*

• Pour yourself a glass of wine.

• Take the cabbage out of the fridge.

• Put on a chef's hat.

**Put Numbered Steps in the Right Sequence**

Writers sometimes stick a numbered step at the end because they thought of it at the end. (Doubt me? While writing this chapter, I received an e-mail describing, step-by-step, how to apply the latest update of a certain smartphone app. At the bottom of the procedure came this note: "We advise you to sync your library before applying the latest app update." Too late!)

*Before:*

1. Boil and drain the cabbage.

2. Make the white sauce.

3. Layer the hot cabbage, the hot white sauce, and the cheese.

4. **Set the oven to 350°F, and wait for it to get hot.**

5. Bake for 15 minutes.

**Note: To save time, turn on the oven earlier.**

*After:*

1. **Preheat the oven to 350°F.**

2. Boil and drain the cabbage.

3. Make the white sauce.

4. Layer the hot cabbage, the hot white sauce, and the cheese.

5. Bake for 15 minutes.

**Create Subtasks (With Substeps)**

When multiple steps work together to accomplish something, clue the reader in by creating a subtask. For example, in the *before* example below, Steps 2, 3, and 4 tell how to make a white sauce, but they don't spell that out. The *after* example does. Readers understand, at a glance, that they have not five but three main things to do.

*Before:*

1.  Boil and drain the cabbage.

2.  **Melt the butter in a small saucepan.**

3.  **Add the flour and whisk the mixture until it becomes frothy.**

4.  **Gradually add the milk, stirring constantly over low heat.**

5.  Layer the hot cabbage, the hot white sauce, and the cheese.

*After:*

1.  Boil and drain the cabbage.

2.  **Make the white sauce.**

    a.  Melt the butter in a small saucepan.

    b.  Add the flour and whisk the mixture until it becomes frothy.

    c.  Gradually add the milk, stirring constantly over low heat.

3.  Layer the hot cabbage, the hot white sauce, and the cheese.

## Flag Any Optional Steps

An optional step can be ignored at the reader's discretion. Flag any optional steps by leading with the word *optional*, as in Step 5 below.

*Example:*

4.  Bake at 350°F for 15 minutes.

5.  **(Optional)** Broil for 2 minutes.

6.  Remove the casserole.

Avoid starting optional steps with *if* (as in "If you want to …" or "If desired …"). *If* lead-ins are more suitable for conditional steps.

## Flag Any Conditional Steps

A conditional step can be ignored only under certain circumstances. Flag any conditional steps by leading with the word *if*, as in Step 2 below.

*Example:*

1. Boil and drain the cabbage.

2. **If no one has wheat allergies**, make the white sauce.

3. Layer the hot cabbage, the cheese, and, if you're using it, the hot white sauce.

In a conditional step, you don't need to say, "Otherwise, skip to the next step." If you need an *otherwise*, you're probably looking at a branching step.

**Flag Any Branching Steps**

A branching step describes alternative ways to accomplish an action. The person following the steps selects the appropriate branch (alternative). Typically, writers flag the branches with a bulleted list or a table.

*Branches in a bulleted list:*

5. Set the oven to medium heat.

   • **If your oven uses a Fahrenheit scale, set it to 350°.**
   • **If your oven uses a Celsius scale, set it to 175°.**
   • **If your oven uses a Kelvin scale, set it to 450°.**

*Branches in a table:*

5. Set the oven to medium heat.

| Scale | Medium |
|---|---|
| Fahrenheit | 350° |
| Celsius | 175° |
| Kelvin | 450° |

If the same branches recur throughout a procedure, make separate procedures. Say you're writing a pizza recipe that says—over and

over—in your own kitchen do this, at a campfire do that. You might as well create two standalone recipes. (The campfire recipe has one step: order pizza.)

*Tip:* Avoid false branching steps, which include branches like "If yes, skip to the next step." This kind of step, as shown in Step 6 below, is an optional step in disguise.

> *Before:*
>
> 6. Determine whether your counter resists heat.
>     - **If yes, skip to the next step.**
>     - **If no, place hot pads on the counter.**
> 7. Remove the casserole from the oven, and place it on the counter.

> *After:*
>
> **6. (Optional) Place hot pads on the counter.**
>
> 7. Remove the casserole from the oven, and place it on the counter.

## Rewrite Ambiguous Steps

Ambiguous steps leave you wondering, *Am I supposed to do this step, or can I skip it?* Ambiguous steps often start with *to*. Delete the *to*. If the step is optional, say so.

> *Before:*
>
> 8. **To flambé** the casserole, douse it with liquor, and blast it with a blowtorch.

> *After:*
>
> 8. **Flambé** the casserole by dousing it with liquor and blasting it with a blowtorch.
>
> *or*
>
> 8. **(Optional) Flambé** the casserole by dousing it with liquor and blasting it with a blowtorch.

**Title the Procedure**

Give each procedure a title.

> **Tip 1: Choose a capitalization style, and stick with it.**
>
> Create a Casserole Flambé (title case)
>
> Create a casserole flambé (sentence case)

*Warning:* Title-capitalization questions—*with*? *With*?—can lead to bloodshed. If you work with a team of writers, let a style guide serve as referee. First, of course, you must agree on a style guide.

> **Tip 2: Choose a syntax, and stick with it.**
>
> How Do I Bake a Casserole Flambé? (question form)
>
> How To Bake a Casserole Flambé (how-to form)
>
> To Bake a Casserole Flambé (infinitive form)
>
> Baking a Casserole Flambé (gerund form)
>
> Bake a Casserole Flambé (root-verb form)

The question form works well if you have plenty of space for title text and if the reader may feel anxious about the topic. A pamphlet describing a surgical procedure, for example, might walk the prospective patient through a set of questions as if the writer were reading the concerned patient's mind.

The how-to lead-in may lend itself to the title of a magazine article or…I don't know…a book, say, or the odd book chapter. *How to* draws readers. (Here you are.) If you're writing a handbook or website full of procedures, though, and if their titles will appear together in a topic list or in search results, all those stacked up *How to*'s amount to pure clutter. In that case, drop *How to*. People browsing your titles on smartphones, especially, will thank you.

The infinitive (*to*) form shortens a *how to* title by four characters. Some tech writers use the infinitive form to create a stem sentence within a procedure. A stem sentence is a subheading that flags the

break between any introductory paragraphs and the first step.[147] In procedures that include stem sentences, the overall procedure title needs a distinct form, often a gerund.

The gerund (an *-ing* word that acts as a noun[148]) is waning in popularity for procedure titles, and for good reasons. Compared with the root verb—we're getting to root verbs—the gerund takes up more space, takes longer to process cognitively, and raises more questions for translators, who often translate it the same way as a root verb anyhow.

When in doubt about what kind of title to choose, use the verb in root form, an imperative look-alike but not a command. Like the gerund, this form enables you to put the action word first. The compact root form has the added advantage of revealing more of the title on a small screen. Finally, because people usually type root verbs in search boxes, this form of title shows up more reliably in search results.

*Warning:* Title-syntax questions, like capitalization questions, can lead to bloodshed. Say what you will about style guides, they help keep the peace.

**Take the Last Steps**
When you've finished writing your procedure, put it in front of people.
1. Observe.
2. Edit.
3. Repeat.

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147. For a discussion of stem sentences and of some reasons that writers might want to let go of them, see Carol Geyer, "Stem Sentences," DITA.XML.org: Online Community for the Darwin Information Typing Architecture OASIS Standard, March 20, 2008, http://dita.xml.org/wiki/stem-sentences.

148. Not all *-ing* nouns are gerunds. See the glossary under "*-ing* noun" on page 202.