

How to build successful Guides

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Why use it

Overall, good guides contribute to a positive user experience, increased user adoption, improved productivity, reduced support dependency, standardized training, user confidence, and the ability to measure and optimize user success.

Before getting started

- **Make sure the content of the Guide is relevant to your users.**
 - What do your users want to achieve/learn? What are their pains?
 - Who should be addressed with this Guide?
- **Be clear on your goals.**
 - What do you want to achieve with the Guide? How will you measure success?
- **Set a communication guideline fitting your company culture.**
 - What style do you use when communicating with your end-users? Is the style more formal or informal?
- **Review and improve your Guides regularly.**
 - Is the Guide as successful as expected? Are users achieving what they need to achieve?
 - How happy are users with the Guide?

How to create a good Guide

1. Add an actionable title and match the title to the goal of the content. The title and sub-title should answer the “what” to expect in this Guide and can prevent users from starting a Guide unintentionally.

2. Define the amount of possible interaction of your users.

A) If you want to introduce users to your app or a feature but don't want them to get confused, reduce the amount of interaction.

Use explanation steps with prevented interaction to show the user around. Use the “Specific Value” option in a step to ensure the user only creates a test object. We also recommend this for the first Guide(s).

B) Improve the quality of interactions with the underlying application. Use our [automation](#) and [validation](#) tools to support your users in their learning process. In that way, you don't only teach your users the processes, but you are also ensuring data quality.

Use the “Any Value” option to allow users to decide what they want to type into an input field. Or “Specific Value” option to validate what users can type in an input field.

3. Only have user-relevant information in your Guide and keep it simple.

Ask yourself for every step and every word that you add:

- Does this step or text add value for the user?
- Is this information necessary for the goal of the Guide and the user at this moment?
- Does this information help the user to achieve the goal of this Guide?
- Can external resources be linked?

4. Avoid long overview tours, but reduce them to the relevant basics. We recommend max 20 steps per Guide.

5. Avoid cognitive overload. Stick to a clear and consistent top-down structure in the order of your Guides and chapters (from general to specific information). Whenever possible, only write one piece of information into one step box. Use info boxes to highlight specific information.

6. Keep the user's attention and motivation. Add praises, Call-To-Actions, emojis, GIFs, images, or whatever keeps the user motivated whenever the tone is appropriate.

7. Use the first and last slides effectively. Use the first slide to set expectations or goals. Use the last slide to wrap up, praise, link additional information, or include a Call-to-Action.

Checklist

Check whether your Guides have everything they need. Find our Guide Checklist [here](#).
