

Guide Checklist

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About this Checklist

This checklist provides a comprehensive guide on optimizing

- the functionality,
- text & wording,
- engagement of Guides and
- language handling.

It covers various aspects such as setting clear objectives, segmenting users, ensuring stability, and incorporating interactive elements. Additionally, it emphasizes the importance of user satisfaction and multilingual support.

Implementing these strategies can enhance the effectiveness and user experience of Guides across different platforms.

Functionality

1. Does the Guide have a clear goal?
2. Does the Guide have less / around 12 steps (recommended maximum: 20)?
3. Does the Guide work on every page (starting point) where it is visible in the Assistant? If not, use context-based segmentation to only show it on the right pages.
4. Does the Guide work for every user group (users with different features, limitations, etc.)? If not, segment it to the right users.
5. Stability: Is the Guide safe from breaking accidentally by clicking somewhere outside the Guide?

Text & Wording

6. Is the title of your Guide clear and actionable? Does it answer “what” the Guide is about, what its goal is?
7. If you have a subtitle, does it tell “why” the user should do this tour?
8. Does the first slide of the Guide tell the user about the content they’ll experience? Is it motivating? Tell your users why they should do this tour.
9. Does the last slide wrap up what your users have achieved? Does it praise the user for what they have done?
10. Does the Guide have a friendly and clear tone that fits your company style?

11. Look at your texts: Are there any sentences/parts that don't contain relevant information? Delete/shorten any sentences that don't add value.

Engagement

12. Are your Guides as interactive as applicable to the content?

13. Did you [add media elements](#) or other relevant resources, e.g. help center articles to improve the user experience?

14. Are your Guides integrated into and accessible through multiple channels (help docs, emails, support, etc.)? For example, [use link boxes](#), [trigger commands](#), and [the promotion feature](#).

Languages

15. Have you translated the Guides into all languages needed? If not, [add and manage multiple languages](#).
