

How to design and format manuals.

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Introduction

Why add design and formatting to manuals?

You'll create better looking manuals and save time later if you set up design formats (& templates) for different sorts of content **before** you start writing.

Manuals are easier to use if recurring standard formats quickly signal what readers are expected to learn from any page. Keep designs simple and clear, so they don't distract from content.

Get some pointers on designing manuals in the next pages.

We can help

Get in touch for our help.

We offer a free initial consultation in which we'll examine your plans and give you good advice with no cost and no strings. We'd rather start a rewarding relationship with you instead of boring you by just trying to sell our services! And, when you're ready, we can create business operations manuals and franchise manuals, documents and training for you in simple and affordable ways.

Get in touch anytime at www.manualwriters.co.uk

Define the layout and style of your manuals.

It's important to define the structure and style of your manuals before you start. A single consistent style makes your manuals clearer (and changing styles later is a pain). **Consider:**

- Should the manual be in one volume or separated into booklets for each area of operation? (i.e. one for each department, function, operation, type of staff, etc.)?
- What's the best way to communicate to the target audience(s)?
- What design-set to use (E.g. branding, colours and fonts, images, heading styles, etc.)?
- What's the 'tone' of writing to be used?
- **What style of communication to use?** (E.g. detailed write-up; bulleted lists; operational checklists; quick reference cards; step-by-step graphics, photos, cartoon-style panels; flowcharts; or legal-style policies; etc.)?

E.g. This...

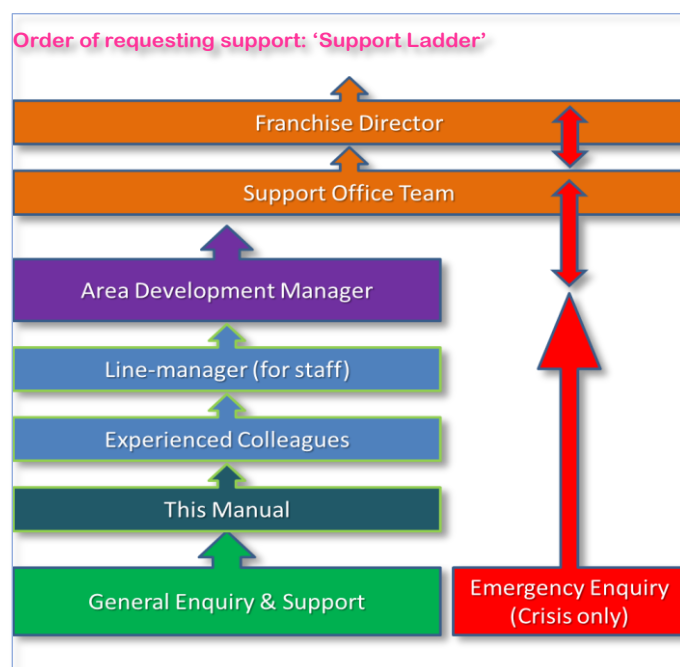
Order of requesting support.
If you need additional support, then you should first have a good look for answers in this manual and discuss your issue with experienced colleagues to see if they can help. If that fails, then chat with your Line Manager who will contact the Area Development Manager for assistance if they can't help. Ultimately, questions can be raised with the Support Office team and if they can't immediately respond then they will discuss your issue with the Franchise Director. However, if you have an emergency, you should get in touch directly with the Support Office team.

...might be better communicated, in this way...

To get support, follow this order of enquiry:

1. First look for answers in this manual.
1. Speak to colleagues.
2. Raise the issue with your Line Manager.
3. They may raise your issue with Area Managers or the Support Office.
4. **In a crisis, you may contact the Support Office directly.**

...or like this.



Create design styles, formats and templates ahead of writing.

Manuals are easier to use if recurring standard formats quickly signal what readers are expected to learn from any page. Keep designs simple and clear, so they don't distract from content.

Create standard formats ahead of writing, so you can use them or fill them in as you go along.

Designs, graphics and design-styles you should set up include:

<i>Style Set</i>	<i>Manual Design</i>	<i>Content Designs</i>	<i>Callout Designs</i>	<i>Other</i>
<i>Your 'brand book' should include these.</i>	<i>The look of the manual and standard pages.</i>	<i>Formats for each type of content.</i>	<i>Graphics to alert readers to important information</i>	<i>As appropriate for your business</i>
Logos and their usage.	Manual/booklet covers.	Standard page for text.	Standard callout boxes.	Building layouts.
Slogans, statements, etc. and their usage.	Binding.	Company vision, mission etc.	Mission critical warnings.	Work area layouts.
Images, standard graphics and usage.	Section division/header pages.	Core values.	Health & safety (etc.) warnings and callouts.	Process layouts.
Watermarks (if used).	Contents.	Core policies.	Important information/ 'NB'/ 'Attention!'.	Workstation layouts.
Fonts.	Copyright and authorised usage.	Organisation charts.	Tips and Tricks.	Manufacturing flows.
Header styles.	Version.	Official policy document.	Case studies/ real life examples.	Merchandising planograms.
Text styles.	Update and revision.	Bulleted lists.	Interesting information, historical notes.	Etc.
Bullet and numbering styles.	'How to use this manual' guides.	Checklists with explanation and detail.	Placeholders for photos, graphics and figures.	
Page and paper layouts, sizes and margins.	Useful contacts.	Checklists (simple) for daily use.		
Electronic formats.	'Where to get more information'.	Quick guides/ reference cards.		
Communication formats.	Glossary.	Process or Recipe cards (as appropriate).		
Colours, sizes & orientation.	Index.	Step-by-step guides with photo/graphics panels.		
	Appendix cover pages and contents.	Step-by-step cartoon panels (used by some).		
		Product/service specs.		
		Flowcharts.		
		Calendars and timetables.		
		Financial information charts and tables.		
		Charts and tables.		



Finalising manual designs once you've finished writing.

How far you go with the final graphic design of your manuals is up to you and your budget.

Above all else, manuals need to be clear, clean and readable.

They don't need to be as 'glossy' as your other corporate materials (because customers will never see them) – BUT a smart manual will nevertheless reinforce corporate image and make a good impression on your employees (and franchisees, if you're franchising).

Reformatting and redesigning a manual can take a long time. **It's better to create standard formats ahead of writing, so you can use them as you go along** (see above) than to leave design until after you have finished.

Follow these steps:

- **Complete the design and graphics.**
Once the final content of your manual is agreed, pass to your design/marketing department (or third-party) to ensure the manual is clear, its formatting and fonts (etc.) are consistent and graphics are simple and complete.
- **Review and agree the final design before publishing.**
Designers may accidentally erase or change the meaning of something when they're updating designs and layouts.
- **Ask someone objective (who is experienced in writing) to proof-read the manual in its final design, before publishing.**
- **Publish in the agreed format.**
- **Check the quality of the published item.**
Software might render the final version in an unexpected way; fonts that aren't embedded might be lost; graphics might bleed over margins; pagination might go awry; links or page numbers in tables of contents might need updating; pages uploaded onto websites or apps might lose formatting; pages that look fine in 'desktop view' might not read well on smartphones or tablets; an online graphic might not fit the screen, so requires awkward scrolling; etc.



Get in Touch/ Ways We Can Help

Get in touch at www.manualwriters.co.uk/contact-us for advice and help with manuals and training. If you're franchising, see our [Franchising Guides](#). **And explore our website for more:**

Operations Manuals

Because our manuals explain every task in your operation step by step and are written bespoke - we can use the 'language' of your brand to create manuals that are easy to follow and that your Team actually use. And we manage the whole process and write everything for you.

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New Procedures for Brexit

To remain successful, your business must adapt for Brexit (even if you don't trade in Europe). Let us develop the new procedures and manuals you need to stay ahead, leaving your team free to concentrate on your success post-Brexit.

[See how we can help you plan and adapt for Brexit>>](#)

Review of Existing Manuals

Existing manuals become less useful (even dangerous) without regular review - as they won't detail changes to procedures and may contain/omit policies contrary to law. We review manuals, manage changes, write updates and help introduce new versions to your Team or franchisees.

[Learn about or manual reviews and updating>>](#)

Consultancy

We have served clients in all sectors at all stages of development and have the experience to advise you on performance and improvement, Standard Operating Procedures (SOPs), best practices, growth, organisational structures, change management and more.

[Explore our consulting services>>](#)

Franchise Manuals

With over 20 years' experience serving franchises in all sectors, our franchise manuals reinforce relationships with franchisees, protect your brand and provide clear step-by-step guides for franchisee (and head office) operations to a high standard.

[Find out more about our franchise manuals>>](#)

Training

Good training is imperative to support your manuals. We create engaging programmes that your Team will enjoy and your business (or franchise) will profit from - and can deliver them too.

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User (Customer) Manuals

Because we have many years' experience developing operations manuals and writing up clear step by step procedures - we can also create detailed user manuals and instruction books for you that your customers will find easy to follow.

[Find out about our user manuals>>](#)

Online Guides & Templates

For a quality manual that's ready on time, it's usually better (and often more cost effective) to use professional manual-writers instead of trying to write manuals yourself. But if you are set on giving it a go - have a look at our expanding selection of online guides and templates.

[Online guides and templates \(NEW\)>>](#)