WHITE PAPER

Document Standards Development -
Image and Quality in Business Communication

(Developed by: Zaetric®)

Introduction

The quality and appearance of a company's documentation creates a lasting impression on both current and potential customers. It often is a factor in how an organization is perceived by their clientele and represents the company's position as a matter of record regarding policies, procedures, safety issues, and other critical content.

One measure of a well written document is a lack of questions from the target audience regarding the topics covered in that document, thus indicating effective communication of the information. The alternative is a poorly written or structured document that generates numerous questions, via phone and email, which require critical resources and time to provide explanations and/or further detail that should have been included with the documentation originally or presented in better detail.

Developing document standards that best suit the company's target audience is a critical step in delivering professional, reliable high-quality documentation that raises the level of communication and minimizes confusion.

Benefits

The benefits of having defined document standards include:

- Users produce consistent, high-quality documents that have same look and feel by using company-approved document templates. This eliminates individual interpretations of how a document should look or be organized and improves the company's image branding through a consistent approach to document creation.

- Establishes specifications and procedures designed to maximize the reliability, completeness and accuracy of the information.

- Specifies company-approved language to increase comprehension and eliminate slang, regional colloquialisms or other forms of informal vocabulary that may cause confusion for audiences from different backgrounds and cultures. This is especially critical for foreign language translations in keeping costs as low as possible.

- Ensures documentation produced includes the required proprietary information notices, safety issues, legal notices, disclaimers and other 'boiler plate' content that must be repeated identically in each document.

- Builds comfort level and loyalty with clients as they become familiar with document structure, level of detail and the accuracy and reliability of the content. If the customer is confident in the documentation then they will seek the answer there rather than call by phone or correspond through email which ties up resources.

What Document Standards Include

Document standards define a company's approach to creating, formatting, revising and distributing content critical to their business operations. The standards must establish a consistency across all document types regardless of their content and purpose. This includes internal documents and those distributed to customers.

Documentation standards include procedures and guidelines to cover the following elements:

- Document creation, file naming syntax, saving and sharing

- Writing, language and style

- Company-specific content and style

- Document design, format and printing / production

- Graphic creation and annotation

- Quality assurance and accuracy

- Document lifecycle - development, review, revision, approval and distribution

Developing Company Documentation Standards

The first step is to determine what the company's document standard needs are and directly address those areas. The goal is to create trustworthy, reliable documentation the audience can comprehend and utilize to great effect.

Some specific tips for creating document standards found in many business operations include:

- Determine storage locations (company server, cloud and others) and access rights for documents and templates to be used and stored. These may be different locations for various departments as, for example, engineering will not need the same document templates as marketing.

- If documents are to be shared or revised, develop procedures for editing, reviewing changes, change approval and version control. Tracking these updates is critical in providing the latest, correct information to the customer with the revised version.

- Author documents in plain and consistent language to effectively communicate content to the reader. Use clear and concise verbiage that the audience will understand to avoid misinterpretation. Do not use slang or other informal vocabulary that may confuse the reader. How that will be understood and/or translated into other languages presents an unnecessary opportunity to misunderstand the content.

- Create different document standards for specific types on content. For example, engineering and marketing have very different content deliverables that require different document standards to meet those objectives.

- Develop separate document templates that contain all elements necessary to create a proper document in the company-approved fashion. These templates determine the 'look and feel' of the company's document output and are the vehicle through which the company impresses their customers with their commitment to professional quality documentation. Important considerations for designing templates are:

  o Use 10 pt (minimum) sans-serif fonts for document body text. Sans serif font types utilize a simplified letterform which is easier to recognize and reduces reading fatigue. Most online content uses sans-serif font. Stylistic fonts are better suited for graphic design and artistic expression.

  o Define proper headers and footers that include logos, page numbering, revision information, document number and other necessary document control information.

  o Set standard page margins and page orientation. For printing and binding, ensure the left page margin is sufficient to facilitate hole-punching without interfering with text and graphics on the page.

  o Decide how bullet lists should appear and their hierarchy through the creation of bullet style and sub-bullet styles in the word processing program. Sub-bullets are usually indented underneath the main bullet.

  o Determine how tables appear in documents through the use of font styles and formatting. Each table in a document should have the same style heading text, column text and table text throughout the document and be similar in appearance throughout.

  o Define rules for creating proper graphics and how they appear in documents. Decide if text will be part of the graphic or use numbered callouts with a corresponding legend below graphic, keeping in mind that text on graphics cannot be translated into other languages. Define rules to ensure each graphic in the document has the same style caption located in the same place each time.

  o For longer reports, plans or proposals set the standard for title pages, company logos, tables of content, appendices, references and other front-matter and back-matter elements.

Conclusion

The basic rules of document standards apply equally to documents that are circulated internally within the business operation and those distributed externally to customers. Uniformity of appearance, accuracy and usefulness of the information and a defined process that includes procedures for generating, sharing and storing documents make up the foundation for all document standards.

Internally, this improves communication as employees have familiarity and access to the latest versions of business forms, letterheads, manuals with required boiler-plate information and other documents based on company-approved templates. Each employee will understand the elements required for the internal documents they create, use the same templates as everyone else, and be familiar with internal documents received from other employees. This increases the level of communication throughout the business operation as everyone is on the same page with regard to the style and format of the information being created and shared.

Externally, consistency of documentation, in both appearance and verbiage, is a positive indicator to customers that the company places a high priority on the professional quality of, and the information contained in each document. This enhances brand identity among customers by building a level of trust that translates to customer loyalty. Customers who have confidence, not only in the products, but also the associated documentation that contains the critical information they need at the critical moment, will be inclined to use that company again in the future and possibly spread the word of their satisfactory experience to other potential customers.

Repeat customers are the bedrock on which a company's stability and growth are realized and this builds a positive impression for new customers as the company's professional, can-do reputation becomes common knowledge throughout their industry. Implementing document standards enterprise-wide elevates the level of professionalism of the entire company by improving communication within the organization and creating trust, respect and confidence with the customer.

Further Reading

For more details on document standard creation and guidelines, see the following;

*ISO How to Write Standards, (*https://www.iso.org/files/live/sites/isoorg/files/archive/pdf/en/how-to-write-standards.pdf)

The Open Group Standards Process, (https://www.opengroup.org/standardsprocess/standards-dev.html)