

By the Book: How to Develop a Company Style Manual

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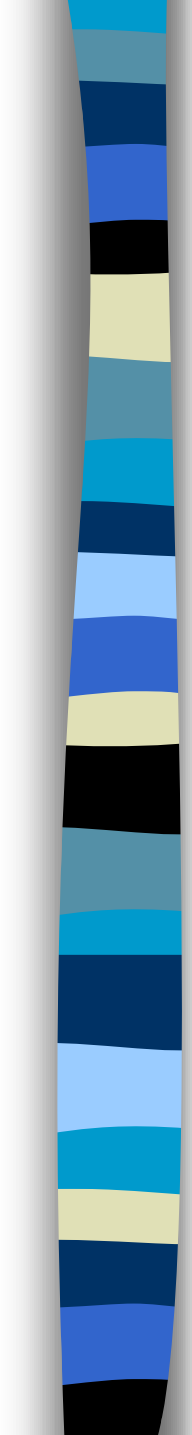
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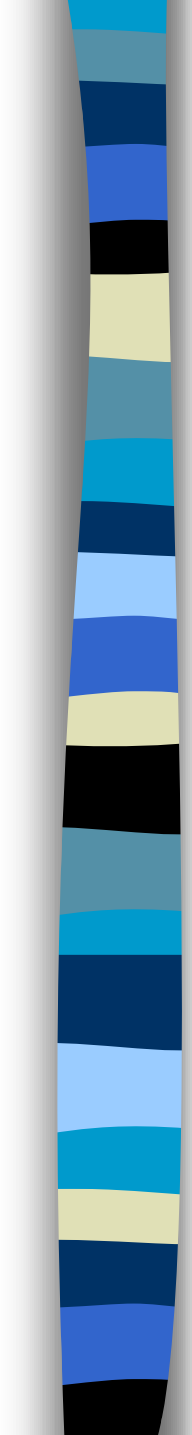
The First Steps...

- Do we need a style manual?
- What are the benefits?
- What are the drawbacks?
- How do I get approval?



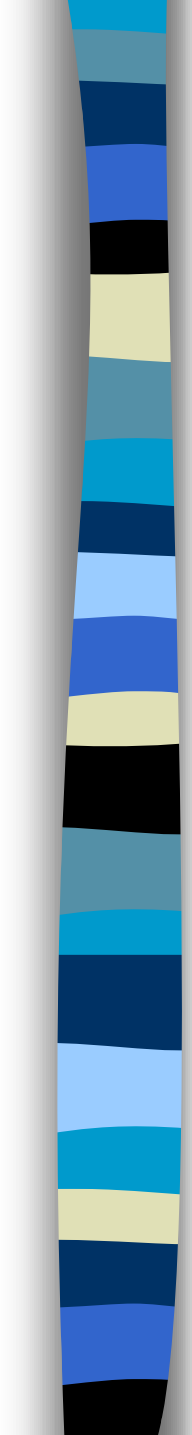
Do we need a style manual?

- What does a style manual do?
 - Provides guidelines for consistent style and format
 - Serves as a training tool
 - Provides documentation of the writing and publishing process
 - Can be used as a marketing tool



Do we need a style manual?

- Which of my/our organization's needs can be addressed by having a style manual?
 - Formats and style were being used, but had not been documented
 - Formation of new Publications Department
 - ISO 9000 requirements imposed by a new 5-year contract
 - Hiring new employees who will be writing reports



What are the benefits?

- To the company:
 - Consistency in style and format
 - Professional look for documents
- To the users:
 - Answer common questions
 - Reduce decision making (format, etc.)
 - Training and skill development
- To the customers:
 - Quality assurance/value added



What are the drawbacks?

- Risks of committing to publishing a style manual:
 - Takes time and resources (i.e., people and equipment) to prepare
 - Costs money to prepare and publish
 - May not be used if poorly written
 - Requires maintenance/updating



How do I get approval?

- 1. Show the benefits to the company and the users:
 - It will save time by answering writers' questions and providing guidance on style and format
 - It will provide a self-help training tool that employees can use as needed (and save the expense of outside training)
 - It will build writing skills, making employees more valuable to the company and helping them with professional growth



How do I get approval?

- 2. Show the benefits to your customers:
 - It helps keep a consistent and professional look among company publications
 - It provides a source of quality assurance and a perception of value added by standardizing some aspects of the writing and publishing process (especially valuable for ISO 9000 applications)
 - It tells your customers that you take the business of writing seriously



How do I get approval?

- 3. If you already have a style manual, show examples of customer satisfaction that can be attributed to it:
 - Compliments on quality of writing
 - Comments on quality of document “cosmetics”
 - Little or no revision/rework needed to go from draft to final (time and cost savings)



Organizing and Writing

- Define the users
- Decide what to include
- Decide what to leave out
- Assemble the pieces



Define the Users

- Writers (technical staff)
- Publications Department (editors, graphic designers, word processors)
- Others in the office (administrative staff, HR, accounting, marketing, etc.)
- Other company offices/locations
- Subcontractors, consultants



Decide what to include

- 1. Start with topics based on your observations and experience
 - Common writing problems
 - Grammar, punctuation mistakes
 - Frequently asked questions
- 2. Add other topics based on specific requests



Decide what to include

- 3. If revising a previous edition include:
 - Updated material (based on new customer requirements, new contract specifications, new legal/regulatory/industry requirements, etc.)
 - Corrections
 - Material that fills in gaps (omissions)



Decide what to leave out

- Information that can easily be found somewhere else
- Anything no longer useful/applicable (e.g., project- or contract-specific items)
- Items that are frequently updated
- Misinformation (check your facts!)



Assemble the pieces

- Present the material in a logical order
- Use separate chapters for different topics to make it easier to locate information



Assemble the pieces

- You may want to include front matter (cover, table of contents, preface, acknowledgements)
- You may also want to include back matter (illustrations, tables, appendices, flow chart, org. chart, index)



Publication

- Decide on a format
- Consider the costs
- Keep track of copies



Decide on a format

- Hard copy (also consider type of cover, binding, etc.)
- Electronic
- On line
- Offer users a choice of format based on what is convenient for them



Decide on a format

- Before the last update of our style manual, users were asked what format they wanted:
 - 5 wanted network version
 - 11 wanted CD version
 - 56 wanted hard copy



Consider the costs

- Hard copies: copying, binding, tabs, etc. (publish in installments?)
- Electronic: CDs
- Don't forget the cost of labor
- Consider available network space



Keep track of copies

- Controlled distribution
 - To prevent unauthorized copies
 - To facilitate recall/update
- Hard copies or CDs
 - Number the copies
 - Keep a distribution list
 - Include an acknowledgement form
- Network access



Following up

- Gather feedback
- Provide updates
- Reinforce learning



Gather feedback

- Active approaches
 - Questionnaire with each copy
 - Pre-update survey
- Passive approaches
 - Keep a list questions from users
 - Keep a list suggestions from users
 - Keep a list of compliments, too



Provide updates

- Decide on timing
 - End of a major project/contract
 - Change in procedures or organization
 - “Critical mass” of changes/corrections
- Decide on extent (update entire manual or just some sections)
- Provide interim updates, if needed



Reinforce learning

- E-mail (the “Grammar 101” series)
 - Tips on grammar and punctuation
 - Style and format reminders
 - Tips on software settings
- New employee orientation
- Informal group training (lunchtime “Brown Bag” seminars)



History of Our Style Manual

- **First Edition: March 1995**
 - comb bound
 - based on style manual from another company office
 - information on punctuation, grammar, treatment of words
 - information on document format, page layout, etc.



History of Our Style Manual

- **Second Edition: February 1996**
 - added Introduction to describe document production process
 - updated to reflect changes in format and word processing software
 - appendices added to answer FAQs
 - published in 3-ring binders



History of Our Style Manual

- Second Edition, Revision 1: November 1996
 - complete replacement of all sections
 - updated procedures, guidelines, and forms
 - added Subcontractor Style Guide
 - corrected errors in previous version (including formatting)



History of Our Style Manual

- **Third Edition: December 1999**
 - complete replacement of all sections
 - more information on punctuation, formatting, citing references from Internet, table and figure placement
 - new section on preparing an index
 - removed some unnecessary or long-winded material on style...



History of Our Style Manual

- Third Edition: December 1999
(continued)
 - chapter on Front Matter and Back Matter split into two chapters, more information added to each one
 - Subcontractor Style Manual updated to address submittals via email



History of Our Style Manual

- Fourth Edition: February 2002
 - complete replacement of all sections
 - modified text format so examples are easier to spot (placed in boxes)
 - deleted section on figures (now covered in a separate Graphics Style Manual)
 - chapter on Text and Tables split into two chapters and more information on formatting added...



History of Our Style Manual

- Fourth Edition: February 2002
(continued)
 - deleted Subcontractor Style Manual and added information on subcontractor submittals to the Introduction
 - deleted acronym list (now available on network)
 - examples of covers and other front matter updated to reflect current contracts/format