

The Anatomy of a Library User Guide

Library guides usually begin innocently enough – the staff gets tired of answering the same old questions and prints up a flyer that provides an overview of hours, rules, and guidelines. Soon other flyers are developed to answer other questions, and before you know it, a whole flotilla of footloose flyers are floating around. Many are outdated. Some flyers are written in great detail while others are vague. Handed a fistful of flyers, library customers feel confused and overwhelmed. The flyers get trashed and the staff finds itself answering the same old questions. At a staff meeting everyone cries "Get rid of the flyers!" "Update the information!" "Stop these mundane questions!" And a library guide is born.

Sound familiar? Ah, yes. And you have drawn the short straw to produce the library guide. Oh joy! Writing a guide, whether to library services, archives, or an online catalog system, is a time-consuming project. This article will highlight considerations for producing a guide that meets the library's objectives and the user's information needs.

First of all, let's face it, not everyone reads user guides. It should come as no surprise to a librarian that it's a whole lot easier to ask someone for an instruction than to track down the answer. (There's job security in that statement somewhere.) The challenge is to produce a guide that the majority of people will review and keep for future reference.

The second point to be made is that a guide is *not* a promotion piece! When was the last time you bought a car because of the information you read in the owner's manual? Didn't read the manual? That's because you received glossy brochures that pointed out features, not how to do something. The purpose of a library guide is to help people get the most from your information service by instructing them on how to do something, for example, place a book request, order an online search, use the microfilm collection. The purpose of a promotion piece, such as a brochure, is to convince the reader that the library's services are valuable to use. Don't rely on your library guide as a promotion tool. User guides

don't sell information services; brochures with features and positive statements do.

Now that those two important points are clear, here is what you need to consider for your user guide.

Coverage. What will the guide cover? All library services and products, or only select ones? (Be careful here; you don't want to create another flotilla.) How in-depth will the guide be? Will it include instructions on how to use the Dewey Decimal System? Will you provide hints on using the library's resources for certain types of projects – perhaps provide a checklist of library materials and titles to be reviewed for the do-it-yourself library customer?

Make a list of what you think should be included in the guide. Be sure to find out from the staff at the front desk the most commonly asked questions. Ask library customers what questions they have about the library's services and products. Remember to make similar inquiries with infrequent library users – they'll probably benefit from the guide the most. Review other library guides, particularly from libraries with a similar subject coverage or customer profile. Note what you like and dislike.

Organization. How you arrange the contents will make or break your library guide. Your editor has found that building an annotated outline from the list of topics to be covered is the easiest way to get started. You can organize the contents alphabetically by topic or group them by services or products or by physical location within the library. If you find yourself with a multitude of topics, using index cards or a computer-based outlining program will be a big help in trying out numerous organization schemes.

Don't try to produce a guide in one afternoon. Work on it and then let it "simmer on the back burner" for a few days. Be alert to library customers and how they use the library's services and products. Are there any patterns that could be translated to the guide's organization? The more you work with the list of topics and your anno-

Pearls of Wisdom

Anyone who is interested in color will be interested in reading the latest issue of *Step-By-Step Graphics*. This magazine is devoted entirely to the topic of color. Articles cover the basic color concepts, the psychology of color, various techniques of using color in graphics, and color on computers, and one even offers a peek at how trend-setting colors are identified and used. Tipped into the pages are two colorfully printed paper samples that demonstrate different color print techniques. Look for the March/April (Volume 7, Number 2) issue of *Step-By-Step Graphics* at your local magazine stand, or send \$7.50 for a single issue to Dynamic Graphics, 6000 N. Forest Park Drive, Peoria, IL 61614-3592.

Looking for labels? Especially the type that advertise your library's phone number on little telephone-shaped stickers? Can't afford to have folders printed with your logo? Why not have labels printed to put on folders? A source for a wide variety of labels is Lancer Label. Ask for the 1991 Lancer Line Catalog for a complete assortment of labels, including labels with hard-to-find shapes. For a copy of the catalog, write to Lancer Labels, P.O. Box 3637, Omaha, NE 68103, or call 800/228-9668.

If your audio cassette collection needs some variety, perhaps some tapes from National Public Radio (NPR) will help. Their *Catalog of Sound: 1990-91* offers some of NPR's best programs. Topics range from health reports, biographies, science fiction, and piano jazz to self-help. For a copy of the catalog write to: NPR Publishing, 2025 M Street, N.W., Washington, DC 20036.

The January/February issue of *Currents* cites the results of a recent survey by Speciality Advertising Association International concluding that more than three-quarters of corporate executives interviewed said they had promo-

tional products—such as a coffee mug, calendar, pen, paperweight, or notepad—on their desks. These items were given to them free of charge and carried an advertiser's name or message. The survey also found that 52% of those surveyed had three or more advertising items on their desks. Another survey, cited by the *Service Dealer's Newsletter*, found that five of every eight airport travelers interviewed were carrying advertising items. Sixty percent remembered the advertiser's name and more than half said they used the advertiser's product or service.

The Ruge Group, the people who present the "Information Broker's Seminar," are now offering the free *Information Broker's Resource Kit*. To receive the kit write to: The Ruge Group, 46 Hiller Drive, Oakland, CA 94618, or phone 415/649-9743.

Those readers thinking about producing a video of their library's services and products may be interested in knowing that the American Library Association Council has approved a Video Roundtable. This in response to the increasing importance of video in all types of libraries and the need for librarians to be informed about this rapidly changing field. The roundtable is being chaired by Pat Lora, Visual Services, Toledo (Ohio)-Lucas County Library. If you are interested in finding out more of what the roundtable group will be discussing, contact the ALA Video & Special Projects Office at 312/280-5053.

The American Paper Institute has just announced the availability of its *Printing on Text and Cover Papers: Texture and Color*. This 140-page publication is packed with ideas, information, and insights on every aspect of designing, planning, and producing a printed communications piece. The book includes 36 samples of text and cover papers in a range of colors and textures, displaying different printing techniques. This is the type of book that graphic designers refer to when seeking ideas and advice on how to give a special look to their designs. You may wince at the \$75 price tag, but if you are seeking to increase your knowledge about paper, printing, and design, this book promises to be worth it. For more information contact the American Paper Institute, Dept. SBS, 260 Madison Ave., New York, NY 10016-2499, or phone 212/340-0798.

When getting bids on printing, be sure to ask if the final price includes delivery charges. Those charges can really mount up and the low bidder may not be the best buy if delivery charges are extra. Also, if you want the delivery to be made to your front door, make sure there isn't an extra charge. For many companies, delivery means "dropped off at the loading dock."

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Back Issues and samples are available at \$9.00 for U.S. and Canada. Overseas orders add \$1.50. Cost of sample issues will be applied to first subscription order. Additional binders are available at \$4.50 per binder.

Missing issues must be reported within 3 months of issue date. Missing issues requested after this time will be supplied at the regular back-issue price.

Library Guides *continued from page 1*

tated outlines, the more you will get a "feel" for the way you want the guide to ultimately present the information. During this process ideas will come to mind that should be jotted down on a piece of paper. Start a master list of ideas, things not to forget, concepts, and other thoughts that come to you as the guide settles into an organized presentation outline. Your editor has found master idea lists to be invaluable checklists at the end of large writing projects.

Inclusions. While organizing the guide's subject coverage, other independent pieces of information will begin to emerge for consideration. Should you include:

Photographs – of the library facilities? A guide without illustrations or photographs is very intimidating and is less likely to be read or used. Try to include pictures of people using the library's facilities. Don't take photographs of shelving units.

Photographs – of the staff? No, if you have a high staff turnover rate. Yes, if your staff is stable enough to last the three years the guide will most likely be circulated before it's updated.

Floorplans/layouts? Yes, but don't use architectural drawings or hand-drawn maps. Architectural renderings are too detailed. Have someone simplify the renderings so your customers can find the library's services and resources. Customers don't need to see how many chairs are in the reading room. And please have the floorplan reproduced by a professional draftsman or designer. With today's computer scanning equipment and drawing programs, there's no excuse for not producing legible, easy-to-follow floorplans.

Illustrations and diagrams? Yes! Whoever said that "a picture is worth a thousand words" was right on target when it came to producing a guide. It is much easier to assimilate instructions about a service process through diagrams than through words. That isn't to say that your guide should be composed of only diagrams and illustrations. However, you should identify library services that lend themselves to visual explanation, such as the interlibrary loan process, online database searches, and book purchasing. Diagrams are particularly helpful in providing an overview of a process and visually linking services to end products. Illustrations and stylized pictures can be used as visual markers to highlight recurring, similar types of information.

Table of contents? Yes. If your guide will be more than 20 pages and topics are not limited to one page, then a contents listing will be helpful. In fact, if your guide is going to be voluminous (yes, some libraries produce guides with more than 50 pages), then each section should have its own table of contents. Indexing

the guide is also a good idea – just don't get carried away.

Glossary? Your editor has yet to see a list of library jargon terms in a library guide, but it seems like a reasonable idea, especially if you find it difficult to write about library services and products without using terms like reference, bibliographic, serials, monographs, current awareness, and other terms that might need translating to the layperson.

Forms? If your forms change frequently or if they look overwhelming, then don't put sample forms into the guide. But on the other hand, supplying copies of forms that can be photocopied by the user to request services can be a real plus.

List of frequently asked questions? Great idea. It doesn't hurt to repeat information, and the Q&A format can deliver library usage instructions to people who might otherwise not get the message because they make it a habit not to read user guides. There are many people who fall into the "non-reader of guides" category. These are the people who load computer software and try to use it before passing a glance over the user guide. Even if you are not a "non-reader," you probably know someone who is. Generally characterized as impatient souls, these are the people who cause library staff members to mutter under their breaths. As the producer of your library's guide, you should identify every feasible means of heading the "non-reader" off at the pass. Use illustrations, diagrams, cheat sheets, Q&A's, quick reference boxes, summary overviews, checklists . . . anything that quickly and painlessly imparts information.

Writing style. Strive to make your guide "user friendly." The writing style shouldn't be dry. Consider the following guidelines:

- Write in plain, ordinary English and avoid acronyms (if you must use some, define them in the glossary), library jargon, and technical terminology – especially when writing about online computer searching and using CD-ROM products.
- Construct short, uncomplicated sentences. Don't write "down" to the reader, but save your compound, complex sentences for another day.
- Assume the point of view of the library customer, taking into account both regular customers who could be considered to be "advanced" users of library services, and infrequent or new library customers, your "beginners." Such consideration may lead you to have an "advanced" library user section in the guide to provide helpful hints and inside tips for the do-it-yourself researcher.

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- Whenever possible and appropriate put in examples of how to use a library service or product. Examples tend to reinforce instructions.

- Use the active tense when writing. The passive tense makes guides very impersonal. Change "The library user will find all the books . . ." to read "You can find all the books . . ." If you have difficulty writing active sentences, envision yourself speaking directly to a library customer. What would you say? And how would you say it?

Layout and design. Be prepared to write at least three drafts of the guide, and maybe more depending on the tendency of your colleagues (or whoever will be doing the reviewing) to be picky. After you have a draft that you believe represents the basic guide, then you can begin thinking about the visual layout of the copy. You will probably have jotted down some ideas on your master idea list – use them as a starting point. Even if you plan to have a professional designer do the final production, you should be prepared to make decisions on the following:

Typographic treatments. Your guide should present its information in a consistent form. This will help the reader to recognize topics and instructions and to scan a printed page for a specific type of information. Most word-processing and publishing programs offer style sheets. Use this feature to maintain consistency in your guide. If you don't have a computer-based style sheet, then maintain one on a piece of paper.

Go through your draft guide and identify all the different types of copy it uses – body copy, headlines, captions, examples, subheads, page numbers, section titles, running titles, highlighted instructions, etc. What typefaces will you use for each type of copy? What will be the point size? Will special treatments be used for any of the copy, e.g., italics, boldface, underlining, upper case? How many spaces will you put between paragraphs? sections? subsections? What gets indented and by how much? Where will you use bullets? asterisks? dingbats? other special characters?

Once you have identified your typographic treatments and styles, take some of the copy from the guide and try the styles on for size. Is it easy to read? Does the text seem to visually flow down the page? Make changes to your style guide, but realize that you probably will have to make adjustments during the final layout.

Page layout. You should develop a grid for the page layout. A grid standardizes how the text will be formatted on the page. First of all, what will be the final page size? If you plan on mailing the guide via the U.S. mail, then a size that will fit into a standard office envelope will prove to be the most practical. Will you use a two-column format, or will you divide the pages into three columns, using the outside third column to draw attention to instructions with margin notes? How much space will go between the columns? What about margins – top, bottom, left, and right? Where will the page number be placed? The running head? Will any special design treatments be used to define the layout space, for example, hairline rules, dotted lines, bars? Where will you place your illustrations and diagrams?

Laying out the page is very important, so don't skimp here. If you find yourself over your head, get professional assistance. Remember, you want this guide to be used. First impressions are based on how a guide looks. In fact, once you have a layout with some draft copy in it, test it on a few customers. Ask them for comments and suggestions. If you find a customer who is willing to review your entire draft copy, go for it!

Production. Early in the development process you should have identified how the guide would be produced and any limitations that would be encountered. Will the guide be photocopied and stapled? Will it be printed on a regular press that will print a couple of colors? What type of paper will you use? Perhaps you can use colored or textured paper to mark different sections of the guide. If your guide is lengthy, consider a three-ring binder with tabs. Many libraries apply the layered look to their guides. This is fine, but don't put loose, layered pages in a folder. The pages tend to flop around and are easily lost. Most library guides are staple saddle-stitched down the spine, but you may want to consider a colorful plasticcoil or plastic comb binding instead.

There is a lot to consider when producing a guide. Your editor has tried to raise only the major points here. Oh, and one more tip. Take your original production time estimate, and increase it by 25%.

This article is based on the experience of your editor, who has for the last five years produced the user guide documentation for the software program *Grateful Med*. Most recently she coordinated the production of the *PDQ User Guide*, which was cited as "Best of Show" and received the "Award of Distinguished Technical Communication" at the 1990-91 Publications and Art Competition of the Southwestern Ohio Chapter of the Society for Technical Communication. The *PDQ User Guide* is now being judged at the society's international competition.

Worth Its Weight in Gold

This issue of *Marketing Treasures* includes your new Cut & Paste clip-art sheet. The sheet presents original artwork in camera-ready form. If you would like previously published clip-art sheets, ask for the Cut & Paste Clip-Art Order Form. It shows all the clip-art sheets that have appeared in *Marketing Treasures*.

Hop on Down to the Library. With National Library Week right around the corner, your editor thought it would be fun to offer some light-hearted graphics as an alternative to all the serious images and messages out there. You can use the three frog images together or as single items. You can also combine any of these frogs with the Spring News headline.

Spring News. If you don't issue a newsletter on a regular basis, then you could use this graphic as your masthead banner and publish a one-page update sheet of what's new in the library. Using a seasonal title such as Spring News doesn't obligate you to a regular newsletter. (Although you should be publishing *something* on a regular basis!)

Ready, Fire, Aim. No, this is not a mistake. The message is "you wouldn't shoot before aiming, so why tackle your research, business plan, or competitors without first getting the facts from the information center?" Use this graphic as a one-page print ad or a poster with an adaptation of the message that fits your customer profile in smaller print at the bottom. And by the way, there's no reason not to place advertisements for your services and products in your own library newsletter. A full-page ad using this graphic on the back page of your next newsletter is guaranteed to grab attention!

Rolodex Card. Here's a graphic that you can use to draw attention to your library's telephone numbers, e-mail address, and other important access points.

Coffee Mug. We've made this mug large enough for you to put your library's name and/or logo and phone number right on it. The graphic could be used to announce morning library tours or a library promotion with coffee mug giveaways, or, accompanied with text, it can promote your latest alert/current-awareness/tracking service.

Piece of Cake. The impact of a message is increased when the message is accompanied by visuals. This graphic can be used to emphasize how easy it is to utilize the information center's resources. If you want, add words to announce your open house during National Library Week – and serve cake.

Promotion Gems

Sometime during the year most *Marketing Treasures* readers generate usage statistics about their information center's products and services. The statistics range from the number of questions answered at the reference desk to the number of book titles added to the collection. Most of the time these statistics wind up in a report that is forwarded to upper management as part of an effort by the center to vindicate its reason for being. After all, when an organization can point out that it answers xyz questions per month, there must be a need for it!

But unfortunately the statistics aren't foolproof protection from budget cuts. Submitted in a dry report, the numbers that show the center's worth are frequently forgotten or not reviewed when the dollars are allocated. What's a librarian to do?

How about turning those statistics into promotion tools? Why not analyze your statistics to see how you can turn them into positive statements. Here are some examples:

Every 5 minutes our information center staff answers a question. Take the yearly reference service totals and link them to intervals of time. Obviously, the time interval should make a positive impression.

Our staff offers over 400 years of combined professional experience. Total all the professional years of experience the library staff offers. Don't limit the years to working in your current organization. Professional years at other library jobs contribute to the pool of expertise.

700 reasons why the information center should be your first resource. The number could refer to your collection of online databases, reference materials, or other information resources.

The library gives 25 people a day a reason to cheer! Let's face it, most people are very happy when the librarian finds elusive information for them. Take your usage statistics and build a statement that expresses just that. A variation could be: *Our staff hears "Thank You" 25 times a day!*

101 ways to get the answers to your questions. Of course, when statistics fail to be supportive, be creative. Use this headline and list your library's name and phone number 101 times.

Put your statistics to work. Use them to emphasize the important role the information center plays in your organization.

Sparkling Reviews

Services Marketing. Second Edition. Christopher H. Lovelock. Prentice-Hall, 1991. \$36.00
ISBN: 0-13-807066-0

If it's been a while since you've read any marketing literature, or if you're looking to augment your knowledge base of marketing techniques, this is a great book to have on hand. Edited by one of the leaders of the services marketing concept, the book is a substantial update and revision to the title published seven years ago.

What makes this book a worthwhile purchase is its diverse offerings. It contains three types of materials: original text chapters written by Lovelock on various aspects of service marketing; reprints of articles, many of which are considered to be recent landmarks in the services marketing literature; and case studies. The ma-

terials are pulled together into four sections: Understanding Services, Strategic Issues, Tools for Services Marketers, and Challenges for Senior Management.

If you look at the book as an anthology of readings in marketing, your editor believes you will derive the greatest benefit from the ideas, insights, and discussions its pages offer. You need not start with the first chapter; be daring—select a chapter of interest anywhere in the book. Read it and give the marketing side of your brain something to chew on. Lovelock always puts a lot of meat into his writing, and his articles here are no exception. If you're a marketing novice this book may not be for you, but for those who understand marketing concepts and are looking for fresh, new perspectives for a library marketing program, *Services Marketing* may be the perfect buy.

The Crystal Ball

April 7-9 Third Annual Customer Satisfaction and Quality Measurement Conference in Washington, DC. Sponsored by the American Marketing Association. Contact: 312/648-0536, ext. 232.

April 9 "Image of Excellence". Led by Kaycee Hale in Fresno, CA. Sponsored by the Fresno Area Library Council. Contact: Sharon Vandercook 209/488-3229.

April 10-12 The Fourth Annual U.S. Pricing Conference in New York City. Sponsored by the Pricing Institute. Contact: 212/826-1260.

April 13 "The Information Broker's Seminar: How to Make Money as a Fee-Based Information Service". Led by Sue Ruge in Miami. Contact: 415/649-9743.

April 18 "Personal and Professional Image Projection". Led by Kaycee Hale in Indianapolis. Sponsored by the Indiana Library Association. Contact: Chris Miller 317/845-3780.

April 23 "Getting Printed Materials Produced". Seminar offered by Performance Seminar Group in New York City. Contact: 802/757-2714.

April 25 "Enhance Your Image . . . Impact Your Organization". Led by Kaycee Hale in Spokane at the Washington Library Association Annual Conference. Contact: Donna McCool 509/335-4557.

May 1-3 "Printing for People Who Aren't Printers". Seminar sponsored by the Rochester Institute of Technology in Rochester, NY. Contact: Val Johnson 716/475-5000.

May 2 "The Information Broker's Seminar: How to Make Money as a Fee-Based Information Service". Led by Sue Ruge in Philadelphia at the Association of Independent Information Professionals Conference. Contact: 415/649-9743.

May 2-3 "Questionnaire Design and Use Workshop". Sponsored by Anderson, Niebuhr & Associates in Atlanta. Contact: 800/678-5577.

May 4 "Partners in Marketing: Our Vendors, Our Clients, Ourselves". Afternoon roundtable discussion featuring Chris Olson and Sharon LaFlosa at the Association of Independent Information Professionals Conference in Philadelphia. Contact: 415/649-9743.

May 5-8 "First Congress on Customer Satisfaction". Conference at Disney World Swan, Lake Buena Vista, FL. Contact: 312/648-0536.

May 6-8 "Marketing Strategy and Planning". Seminar sponsored by the University of Chicago in Chicago. Contact: 312/702-1724.

May 6-8 "Marketing & Public Relations". A two and a half day seminar led by Arlene Sirkin in New York City. Sponsored by the Special Libraries Association as part of the Middle Management Institute. Contact: Joy Lerner 202/234-4700.

May 7 "Writing & Designing Successful Promotional Materials". Seminar offered by Performance Seminar Group in New York City. Contact: 802/757-2391.

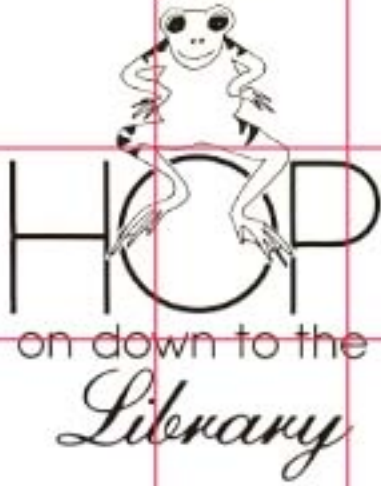
May 9 "The Speech: Pen-to-Podium Planned Excellence". Offered by Lou Williams Seminars in Dallas, TX. Contact: 800/323-2897.

May 10 "Mainstreaming the Special Library". Seminar by Alice Warner for Special Libraries Association in Minneapolis. Contact: Joy Lerner 202/234-4700.

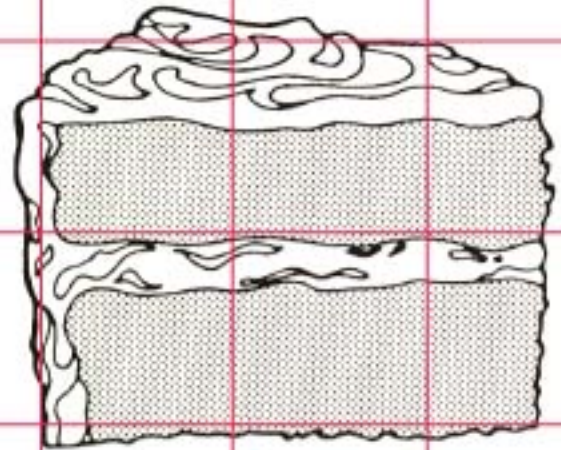
May 13-14 "Value-Added Selling". Seminar in Chicago. Sponsored by the American Management Association. Contact: Pamela Wilson 212/903-8229.

May 16 "Improving Your Public Relations". A workshop offered by Ragan Communications in Minneapolis, MN. Contact: Diane Mottier 312/922-8267.

Locating information through
the library . . .



Avante Garde Book, 24 pt.
Helena Script, 36 pt.



. . . is a piece of cake

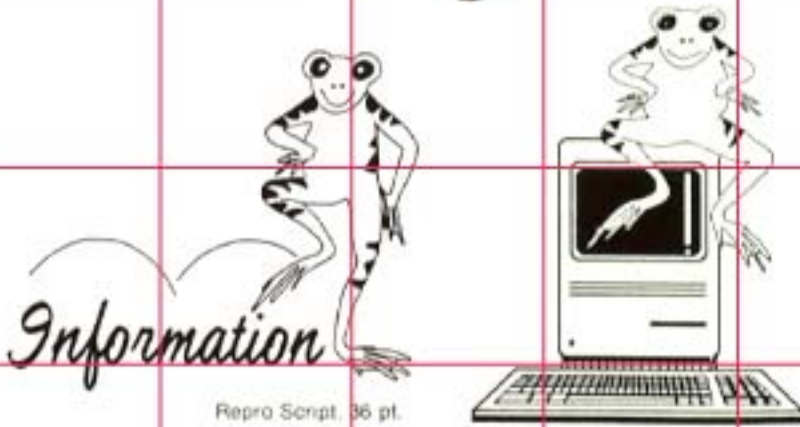
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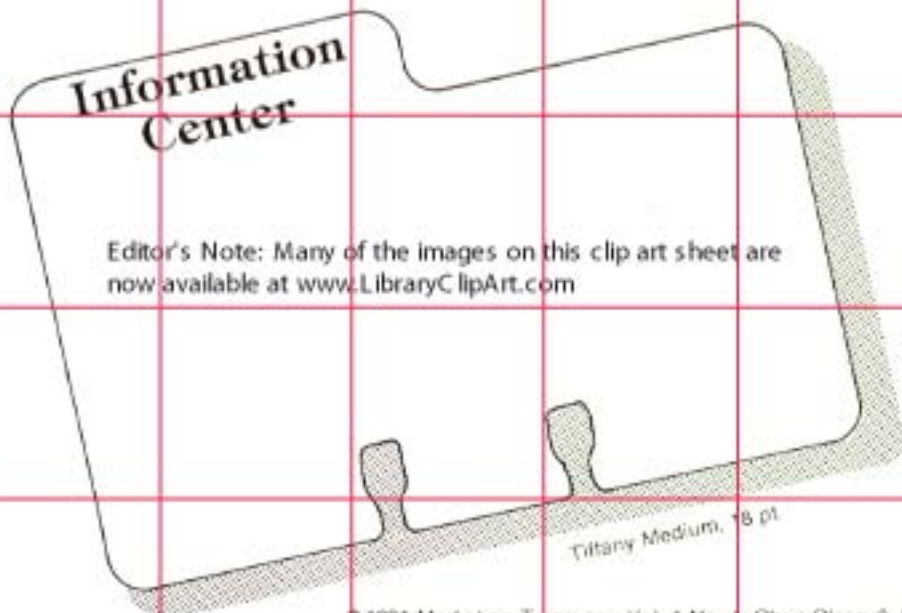
READY.

FIRE.
AIM.

Kabel Heavy, 72 pt.



Repro Script, 36 pt.



Editor's Note: Many of the images on this clip art sheet are
now available at www.LibraryClipArt.com

Tritany Medium, 18 pt.

