Building a Better Style Guide
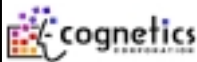
Whitney Quesenbery

Cognetics Corporation

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Why style guides?

- **We were asked for them**
  - ◆ Style guides as shorthand for "get me some usability"

- **We needed to use them**
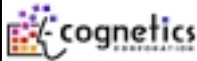 - ◆ Style guides as a way to communicate design concepts and guidelines

Bottom line

- If a style guide...
  - Does not have management support
  - Is created by a small group without broad input
  - Is not integrated into an overall process
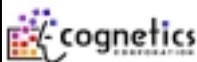 - Does not reflect a consensus

  …its long-term impact will be minimal

If "style guide" is shorthand, what's it shorthand for?

or

When in doubt, conduct a survey

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Survey participants
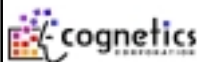
- Conducted using Zoomerang
- Notices posted on three popular e-lists
  - Technical Writers
  - Information Architects
  - Usability Engineers / User Interface Designers
- N=50

Style guides are…

- Created for multiple applications
  - Suite of products (44%)
  - All applications (28%)
  - Internal apps (14%)
  - Just one product (14%)
- Owned by
  - Usability/UI design (64%)
  - Product management (18%)

- Primary contributors:
  - UI Designers (90%)
  - Usability (60%)
  - UI Developers (73%)
  - Product Mg'ment (46%)
  - System Architects (29%)
  - Marketing (23%)
  - Business Analysts (19%)
  - Customer Service (17%)
  - Documentation (8%)
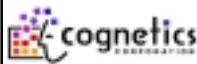
- Top three goals
  - Create a consistent look and feel
  - Improve usability
  - Communicate standards to developers
- Maintenance
  - Ad hoc basis (51%)
  - Regularly scheduled meetings (25%)
  - None (8%)
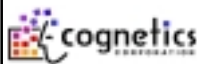 - Formal process (4%)

Most common topics

Over 70%
- Colors and fonts
- Screen/page layout guidelines
- General design principles
- Required elements
- Controls appearance and behavior
- Standard terminology

Over 50%
- Branding guidelines
- Image library
- Use of controls
- Technology standards
- Errors and messages display

Generally successful

|	Agree------------------Disagree			
The guide has been successful in meeting its goals	**12**	67	**16**	4
The guide has become a daily tool	8	45	39	8
The style guide is a well-respected information source	**14**	53	29	4
Our UIs have become more consistent	**20**	57	**18**	4
Our UIs have become more usable	24	43	27	6
There is general agreement with the guidelines	**16**	65	**12**	4
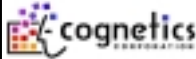
But, comments reflected a struggle

- "have trouble with compliance"
- "was not part of our design process"
- "CEO believes everyone should express their individuality"
- "development team seldom uses it"
- "number one factor in its success is upper management support/direction"
- "(we) battle 'it doesn't apply to us'"
- "communication of the style guide has been our biggest issue"
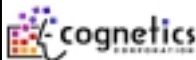
Style guides and a common look and feel

UPA 2001
Common Look and Feel Workshop
Mary Beth Rettger, Diana DeMarco
with 22 participants

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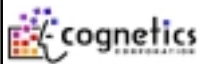
Benefits of a common look and feel

- Branding
  - The 'trade show problem'
- Internal efficiency
  - Knowledge transfer
  - Code/design re-use
  - Faster time to market
  - Reduced support costs

- Usability
  - Easier to use a single product
 - Easier to learn new products
  - Increased satisfaction

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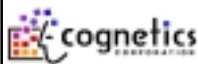
Taxonomy of consistency*

More visible to users →

1. Terms and definitions (language)
2. Appearance (layout, colors, icons)
3. Common operations
4. Deep model (navigation, menus)
5. Underlying software architecture

More effort required →

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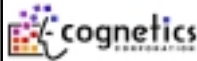
* Proposed
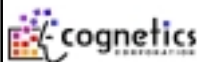

Lingering questions

No consistency at all ←———————→ Total, rigid consistency

How do we select the right point on this scale for each context?

Can you have too much consistency? When does discrimination begin to suffer?

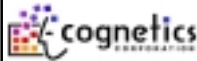Is there a performance curve for users we can match to specific types of consistency?

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People don't typically go
to an emergency room on
a good day

or

Why create a style guide

Triggering events

If you don't understand what event
triggered the call for a style guide, you
don't know what problem you are solving!

- Competitive pressures
- Customer demands
- Internal cost issues
- Manage growth
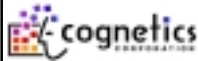- Need to merge designs
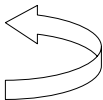- New branding
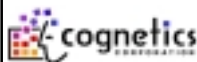
Context

"You're not just building guidelines but also creating a process"

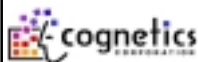- **People interaction**
  - Talk
  - Collaborate
  - Review

- **Authority**
  - Executive support
  - Performance plans
  - Defect tracking
 - Ability to stop a release
  - Certification

Follow a UCD process

- Define goals, scope, success criteria
- Understand users, context, requirements
- Establish guideline(s)
- Evaluate resulting design   Iterate
- Communicate guidelines
- Evaluate process and impact
- Maintain and extend

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Style guide user needs

All	What are the rules I must follow in my work?
UI Designers (Design Concept)	How should the interface be structured, both for layout and navigation?
System Architects	What are the implications for the architecture of any UI decisions?
UI Designers (Detail Designs)	How do individual functions fit into the program structure?
	What screen/page or interaction templates are available?
Developers	How should the UI code be structured to meet design requirements?
	What controls or widgets are needed?
User Assistance	How will assistance be offered to users?
	What standard UI elements are used? How should they be documented?
Quality Assurance	What are the standards the user interface has to meet?
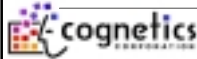
Two case studies:

How style guides helped
two design teams get
their work done
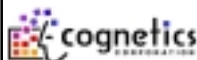
Helping a dispersed team communicate

A small central design team needed to publish guidelines for a larger group of geographically dispersed product and content developers.

Documentation

- Site structure
- Visual design rules
- Page layout rules
- Image library
- Samples and templates

Communication

- Documented guidelines for future development
- Provided links to prototypes
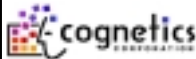
Forging a common approach

A group of designers working on a product suite needed a way to stay in sync and meet goals for usability and consistency.

Documentation

- Design ideas and approaches
- Common elements and layout
- Specifications for controls and widgets

Communication

- Weekly meetings focused on shared solutions
- Frequent additions
- Tools to help make design decisions
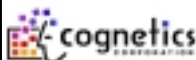
In both projects…

- Original goal was "consistency rules," but...
  - Needed a shared approach to user interaction styles, not just surface look
- Style guides documented design work
 - Shifting between descriptive and prescriptive

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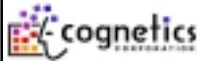
Making it useful

- Early useful content was critical
  - Developers visited for image libraries and style samples
  - Comparisons between controls, guidelines for choosing templates helped designers work better
  - Detailed examples were available
  - Specs for common elements housed in the style guide

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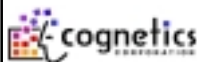
A style guide is the durable portion of a design
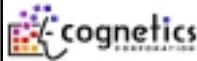
Style guide contents

- Introduction
- UCD Principles
  - **Heuristics, usability goals, user profiles, accessibility**
- Design Process
  - **All related processes**
- UI Concept
  - **Metaphors, assistance**
- UI Architecture/Frame
  - **App/Site structure, menus, control bar, home**
- Page/Window Layout
  - **Page structure, shell**

- Controls
  - **Usage guidelines**
- Interaction
  - **Keyboard, pointers, voice**
- User Assistance
  - **Text, messages, help**
- Common Functions
  - **Patterns, shared specs**
- Visual Design
  - **Logos, fonts, colors, icons**
- Audio and Multimedia
  - **Animation**

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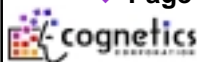
What's in, what's out

Include:

- Only as much as needed to communicate intent
- Exceptions to platform style guide
- Justifications for guidelines
- Pictures, samples, examples, prototypes
- Unanswered questions
- Checklists and job aids
- Meeting minutes, process
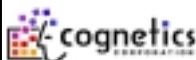
Don't include:

- Specific design specs
- Detailed process or technique descriptions
- Detailed user analysis for a single product
- <u>Only</u> sample screens without explanations
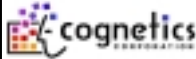
Format ideas

- If you don't need a formal document, you can try….

- Minimal/visual approach
  - ◆ 'Two page spreads' with key templates and callouts
- Most frequently asked questions
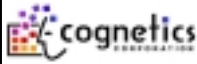- Stylesheet cheat sheet
- Working code samples

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Writing style

"No one wants to read all that stuff"

- **Write for reference**
  - ◆ Put the most important information first
  - ◆ Include "handy reference guides"
  - ◆ Keep it short

- **Consider 'voice'**
  - ◆ Formal guidelines
  - ◆ Informal discussion
- **Use hypertext**
  - ◆ Avoid duplication or scattering of information
  - ◆ Connect concepts and related documentation

Herding old cats into new tricks

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Slide 1
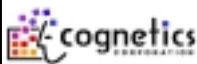
Problem:
- How to communicate 'fuzzy guidelines'
  - General agreement in place
  - Rules difficult to craft with precision

Solution
- Create a 'mission statement'
  - Informal pattern
  - Expresses the intent: does what, for whom, how
 - Should be good enough to act on

Slide 2
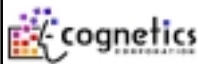
Example

Popup windows will:
- Reduce the need for navigation by...
  - showing additional detail
  - collecting input just-in-time
- Increase user success in navigation by...
  - providing better information scent
  - showing options for actions
  - collecting missing information
- Stop the action for a user response for…
  - confirmations from the user
  - error handling

Use for tasks which are:
- Small in scope
- Short in duration
- Perceived by the users as a coherent task
- Able to be abandoned with an acceptably small loss of work

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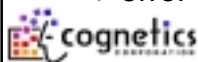
Problem

- Screen samples can be taken too literally when they show a guideline element in a complete context
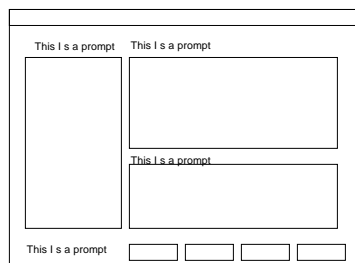
Solutions

- Use wire frames
  - Abstract key elements
- Blur the image
  - Keep key elements sharp, while reducing visibility of other details
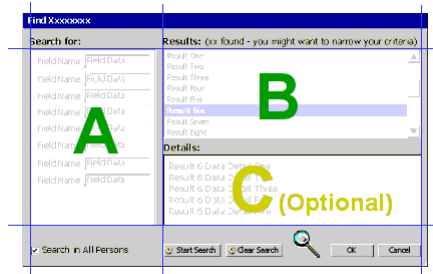- Provide multiple examples
  - Show range of options
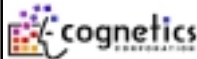
Samples and examples

Wire-frames:
Shape, location, but no detail

Blurred image:
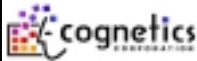Only key elements visible

Blue = alignment guidelines

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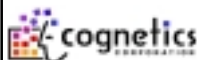
Problem

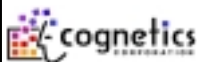- Need a way for people to submit problems, issues or exceptions easily

Solution

- Add a comments feature to each guideline, so issues or exceptions can be submitted
  - Periodically review and incorporate comments

Any questions?

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    User-centered interface design

    Evaluation and testing

    Consulting and methodology

    Staff development

Our approach creates design that goes beyond surface aesthetics

    Understand the user's perspective

    Simplify where possible

    Work with the technology

    Execute rapidly, test frequently, manage tightly

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