Resource Design Playbook

This document shares how to create resources that are practical and user-friendly.

Resources come in all shapes and sizes. The difference between a 'resource' and traditional 'learning content' is that the former is designed to be used in context, whereas the latter is often designed around recall/retention. This is why you might find yourself making a lot of checklists see 'The Checklist Manifesto' by Atul Gawande for inspiration.

Getting Started

The aims of a resource are to:

1. Provide practical guidance to the audience that allows them to perform in the moment.

2. Be read/viewed in just a few minutes.

3. Shift the audience's behaviour so that it matches the immediate performance needs of the organisation.

4. Point to other relevant resources or platforms to embed the behaviour.

Considerations when designing a resource:

1. Design using UX digital principles rather than academic ones. Think Google not school or university.

2. Write using open, inclusive language.

3. Keep reading or watching time to a maximum of three minutes.

4. Pay attention to the look and feel. Does it feel 'premium' and coherent?
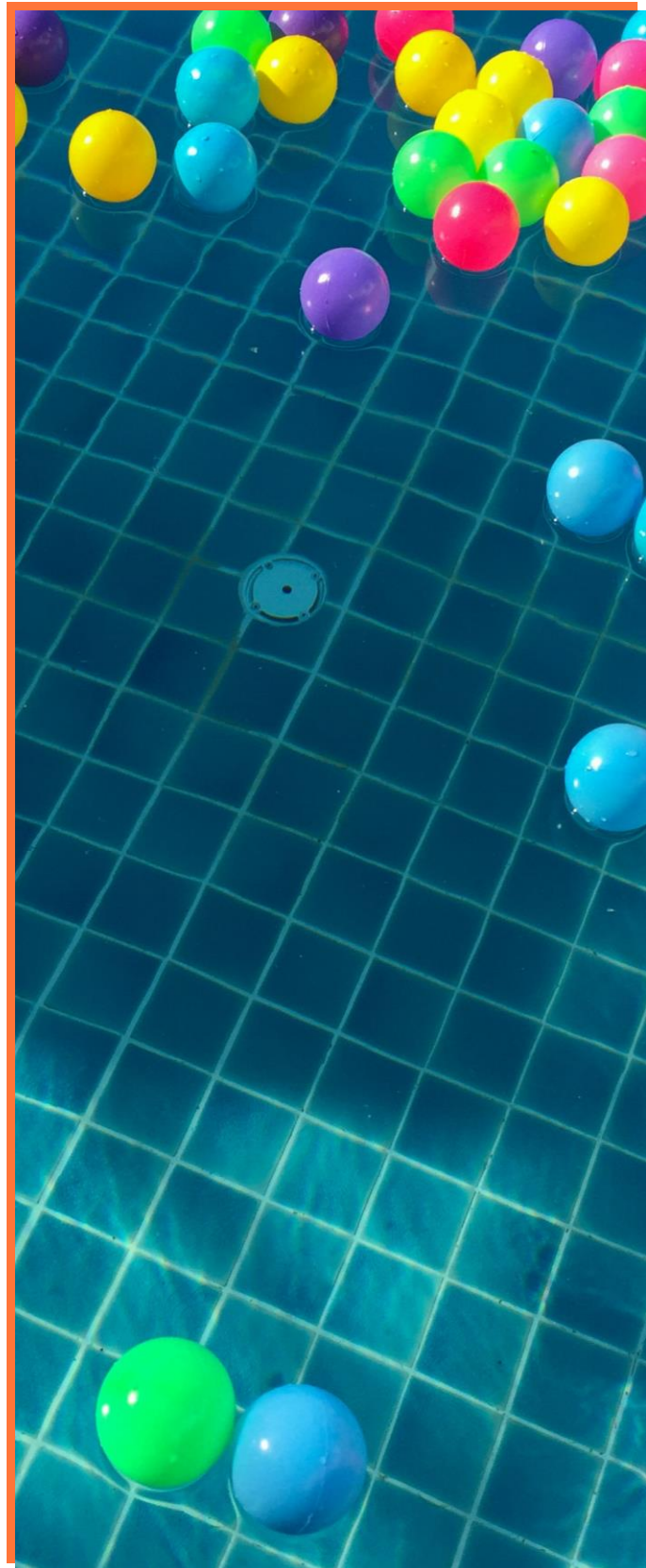
Developing a Resource

Think of the steps required for a user to master a certain task. Sometimes these are referred to as 'Alarm Clock Queries.' A user might not care about the inner working of their alarm clock, or why it functions the way it does. But, they need to know the steps and only those steps which allow them to set the time and alarm.

Make your resources nice to look at, but don't overdo it. A 'wet paint' sign or a shopping list are both useful resources because they're usually found at the point of need and contain pertinent information.

Think about the environment in which your resource will be used. What context will the user already have to hand?

What are some examples of resource design? The point of a good resource is to be useful at point of need and helps someone do a task:

- Guides

- Checklists

- Instructions & instructional videos

- Maps

- Posters

- Editable document templates

- Flowcharts/diagrams

- Books

- Signage & labels
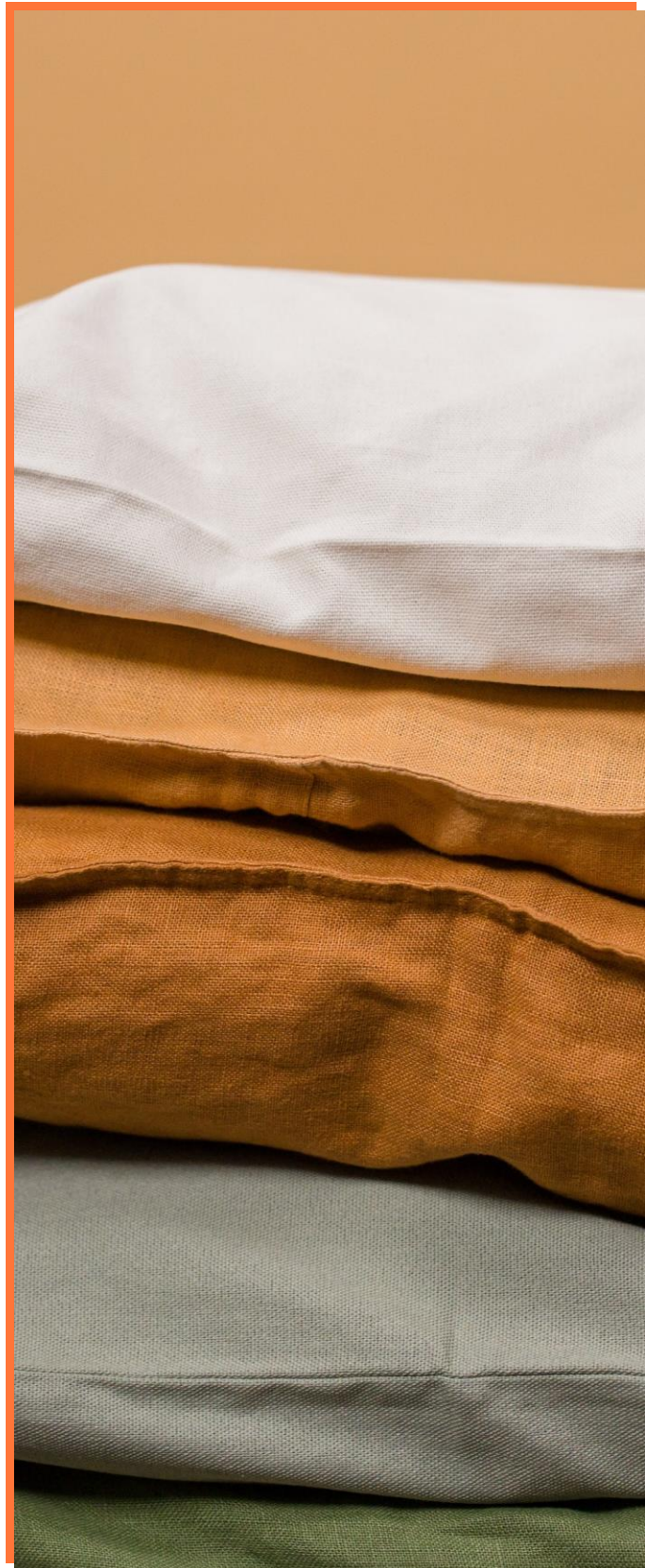
Case Studies

CASE STUDY 1

A company was experiencing a large volume of incorrectly submitted expense claims, meaning they had to manually reject or amend these. This was wasting time and effort for the accounts department.

The guide which users were referred to, to help them submit expenses was 80 pages long and far too complex. Users were just ignoring it and guessing how to use the system.

The guide was refined to 5 pages and split into multiple resources which were rewritten. This enabled users to easily pick which task in the system they wanted to complete and quickly follow the guide.

Incorrectly filed expense claims were drastically cut once the resources were made available.

CASE STUDY 2

A company was investing in its manager and leader population in order to help them consistently handle key tasks. These tasks varied from performance reviews, disciplinaries, appraisals etc.

In the research it was found that the leadership population were conducting key conversations in different ways, leading to an inconsistent employee experience.

In order to address this, a series of conversation templates were developed enabling leaders to conduct these conversations in a consistent way.

The resources were brief and unobtrusive, providing a template for the conversations.

Employees had a much better and consistent experience as a result.

Top Tips

01 Get inspired from your personal life. What have you read or seen that helped you accomplish a task in the moment?

02 Refer to reputable sources of information such as Harvard Business Review. This builds credibility and sign-posts further guidance if necessary.

03 Consider the broader picture. What other resources or experiences will users have access to alongside your resource?

04 Technology can create unnecessary barriers to your resource. Make sure they're easily accessible as users will want them at the point of need.

05 Consider if the resource needs translating into other languages. Lego often avoid the use of written language in their instruction manuals which makes their products easier to distribute.

06 Long form vs short form. Books are great resources but do your users have the time to read a chapter when a single page would do?

07 Think about whether the resource should be physical, digital or a blend of the two. QR codes can help your users discover more about an environmental resource.

08 How will you measure engagement with your resource? This is much easier with digital resources.

09 Make sure you're using the best format for your resource. Some things are better explained using a quick diagram than a 5-minute video.

10 Resources help people do something they already want to do, often when they're short on time. They're best kept functional and to the point.

Common Mistakes

01 If your resource isn't useful and delivered at point of need, people won't use it.

02 Don't spend too much time introducing your resource. The best resources lay out what problem they're trying to solve without a big preamble.

03 Many courses should have just been resources to begin with. Push back if your stakeholder is expecting a course.

04 Don't just wait for people to find your resources. Find out what the point of need will be and make sure they're easy to find.

05 Don't forget to test this with your end users and iterate. Share prototype resources with your original focus groups and they can help make it even more useful.

06 Don't design your resource for one specific platform/location. If it's useful, people will share it and become advocates. Make this easy for them to do.

07 Don't tack on pointless assessments to resources. Their measure of success is in the application, not whether or not people remember the detail.

08 Don't assume the audience know nothing about the topic. This can come across as patronising and will make the resource seem irrelevant.

09 Don't build something that isn't compatible with screen readers and other accessibility technology. Test this.

10 Check your facts. If the resource isn't up to date, relevant and correct, then users will write it off as redundant.

Decision Criteria

QUESTION ONE

How simple or complex will the audience think the content topics are?

QUESTION TWO

Do the audience already care about the topic? Is it important that they do?

QUESTION THREE

How many languages will the resource be needed in?

QUESTION FOUR

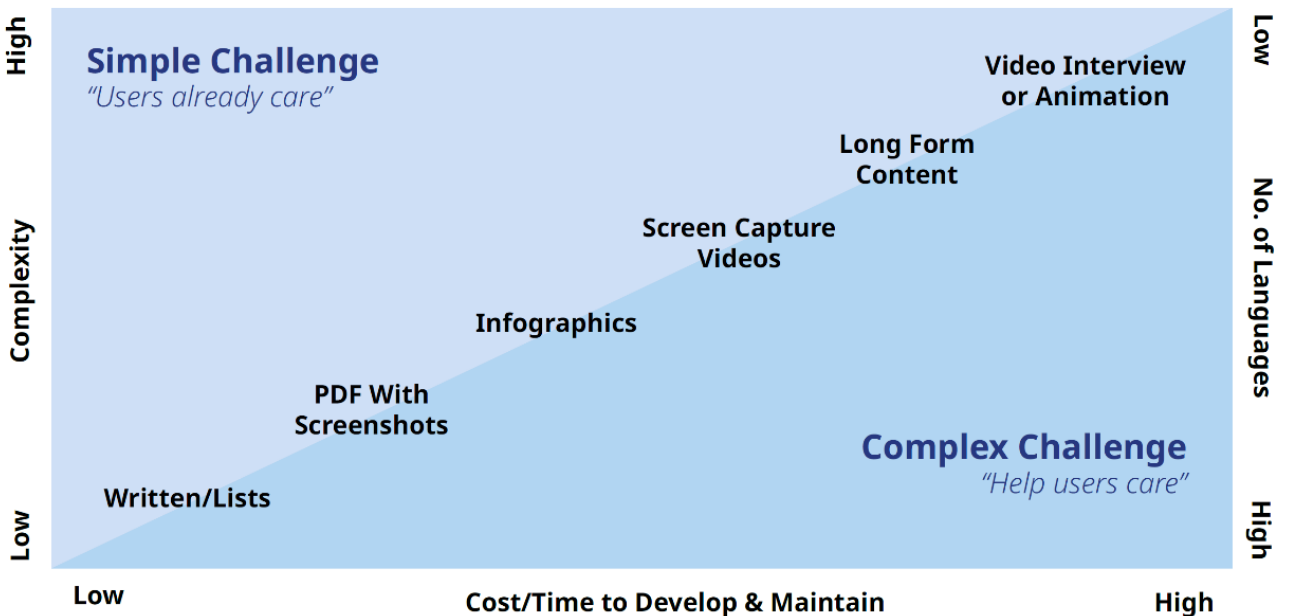How much time and budget do you have to create and maintain the content?

Selection Matrix
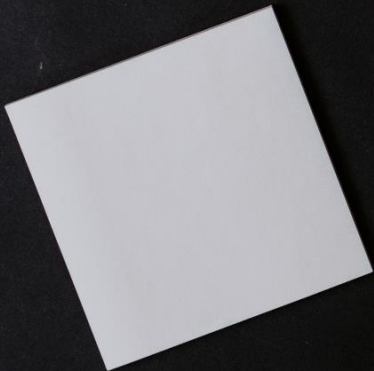
Not all resources will be suitable for every task.

For example, If you want to help people submit expenses correctly, then articles about the rules and regulations surrounding corporate expenses is probably not going to help them.

This matrix provides examples of the things you might consider developing based on where your audience sit on the scale.

When looking at the matrix, select the simplest type of resource that will do the job. These are listed from left (written list) to right (videos). Selecting the right type will make it faster and cheaper to develop and translate any solution.

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