InQuira Writing Guidelines

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Overview

How Users Scan a Page

Users start by quickly scanning the whole page, then read text in roughly the following order:

1. Interactive controls in the center of the page
2. Commit buttons
3. Interactive controls found elsewhere
4. Main instruction
5. Supplemental explanations
6. Page title
7. Other static text in main body

You should also assume that once users have decided what to do, they will immediately stop reading and do it.

How Users Read Page Text

As you think about writing text, consider these facts:

- During focused, immersive reading, users read in a left-to-right, top-to-bottom order (in Western cultures).
- When using software, users aren't immersed in the UI itself but in their work. Consequently, users don't read UI text—they scan it.
- When scanning a page, users may appear to be reading text when in reality they are filtering it. They often don't truly comprehend the UI text unless they perceive the need to.
- Within a page, different UI elements receive different levels of attention. Users tend to read control labels first, especially those that appear relevant to completing the task at hand.
- By contrast, **users tend to read static text only when they think they need to**.

Centered & Right-Justified Text Blocks

Centered and right-justified text blocks are difficult to read. In western cultures, people read from left to right, anchoring our tracking across the page at the vertical line of the left margin. The ragged-left margins produced by centering or right-justifying text make that scanning much harder, because your eye needs to search for the beginning of each new line.

Left-Justified Text

Left-justified text is the most legible option for web pages (and information in tables) because the left margin is even and predictable and the right margin is irregular. Unlike justified text, left justification requires no adjustment to word spacing; the inequities in spacing fall at the end of the lines. The resulting ragged-right margin adds variety and interest to the page without reducing legibility.

Eliminate Redundancy

- Redundant text not only takes valuable screen space, but also weakens the effectiveness of the important ideas or actions that you are trying to convey. It is also a waste of the reader's time, and all the more so in a context where scanning is the norm.
- Review each page and eliminate duplicate words and statements.
- Don't avoid important text—be explicit wherever necessary—but don't be redundant and don't explain the obvious.

Avoid Over-Communication

- Even if text isn't redundant, it can simply be too wordy in an effort to explain every detail.
- **Too much text discourages reading—the eye tends to skip right over it—ironically resulting in less communication rather than more.**
- In text, concisely communicate the essential information.

If You Do Only Four Things

- Work on text early because text problems often reveal design problems.

- Design your text for scanning.
- Eliminate redundant text.
- Use easy-to-understand text; don't over-communicate.

Organize the Information

Present information in priority of need. Signify the important information through structure that emphasizes a logical hierarchy:

- Page title
- Standardized headings
- Subheadings
- Body content
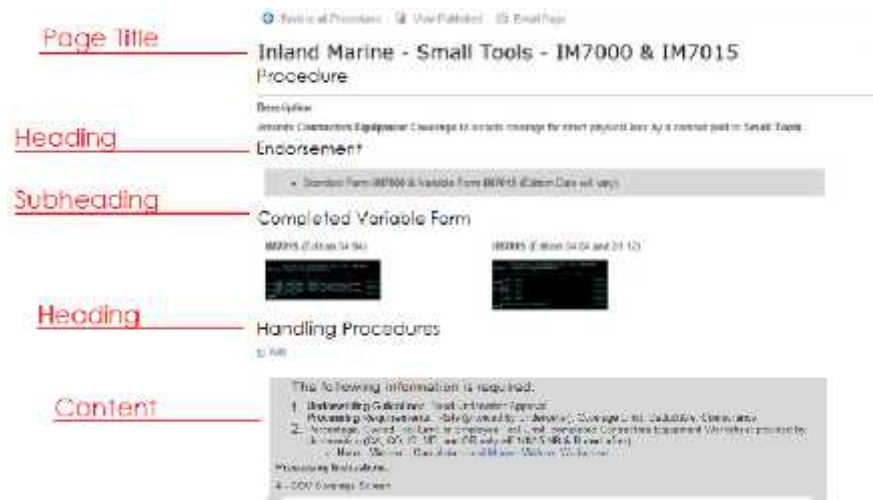
For applicable articles, employ the consistent presentation of content by use of a content template with well-placed standard sections for page titles, descriptions and guidelines or handing procedures.

Consider how the information will be used and organize it in the most efficient way. Make the task flow intuitive by emphasizing key points, warnings and next steps.

Write Clearly and Succinctly

Content must be written and presented in a highly efficient way to provide consumable content to the CSRs. Write text for the 9th grade level. To that end, here are some guidelines:

- Present information in priority of need.
- Emphasize the logical hierarchy.

- Write in the active voice. Passive construction can be lengthy and vague.

  Active: "An individual owns or leases the vehicle." The subject (individual) performs the action (owns or leases) on an object (vehicle).

  Passive: "The vehicle is owned or leased by an individual." The object (vehicle) becomes the subject and receives the action (is owned or leased).

- Use a tone that implies a professional conversation. Maintain this tone consistently among articles.
- Write with fewer words.

  Before

  NSS has coastal restrictions on property quoting and binding set by the underwriting regions. Due to the proximity to the coast and NSS being unable to physically inspect these properties before binding we are required to refer property quotes to an exclusive agent in the insured's area. Below each of the following coastal states there is a list of counties and zip codes that are restricted, if applicable.

  After

  Guidelines

  ⚠ Ask for supervisor approval before binding any property in this state.

  🔺 Property policies are restricted in the following counties:

- Use short sentences for faster reading and better understanding.
- Use clear, direct language and laymen's terms when possible.
- Reduce complex information into bite-sized chunks.
- Rewrite unclear explanations and cut lengthy ones.
- Enlist hover help to tighten copy and further explain or define technical terms or to provide examples.

replacement service and has not obtained the replacement key
- Allied Extra (EXABLO) covers auto and home key replacement.
- The key replacement ... Some customers may have additional lockout coverage ... he member do the policy and do not ... under the Extra Coverage endorsement ... is the only per the member know the ... (EXABLO) Emergency Lockout up to $150.00
- Centralized Fire and ...
- In some cases Agero is able to cut keys when service is dispatched; additional fees may apply
- Commercial and Specialty Auto (Titan) customers **may only submit reimbursements by mail or fa:**

Ask for supervisor approval before binding any property in this state.

Property policies are res If you do not get supervisor approval, the policy will placed on the sales Intervention list.

Ask for supervisor approval before binding any property in this state.

Property policies are restricted in the following counties:

Home, Dwelling Fire, Condo and Tenant

- Spell out the names of states because they can be read and understood faster than abbreviations. Edit or delete unnecessary information.
- Ensure terminology is consistent among articles - if it differs between states, then align it or provide hover help to explain the difference.
- Rewrite dated information for its relevance to the present or remove it if it no longer applies. Consider implementing a policy to review procedures and articles that are old or outdated on a regular basis and decide if they should be updated, rewritten, archived or deleted. For example, articles referring to effective dates that are beyond a certain time frame should be reviewed. If the April 9, 2010 release date is no longer relevant to the information, then consider striking it or moving the information to the bottom of the page.

Maximize Scannability

Make content more usable by enlisting tables, hover help, wisties/collapsibles, links, icons, color, bold type, capitalization, bullets and white space when possible.

Tables

Allow for easier reading with a vertical arrangement of content rather than long horizontal lines of copy.

Table headings and subheadings are title case; table cell content is sentence case. Use Tables for:

- Tasks
- Guidelines in applicable scenarios that make use of if/then statements.

Before

After

Links

Write descriptive links with active verbs and avoid stating "Click here".

For example,

Read the Farm Bureau procedures for more information rather than this current InQuira version:

Continue to use blue text to indicate links in InQuira.

Icons

Icons provide a visual cue to pay more attention to the information.

Use Icons to convey warnings/alerts such as Caution, Stop, Go. Be sure to use them consistently.

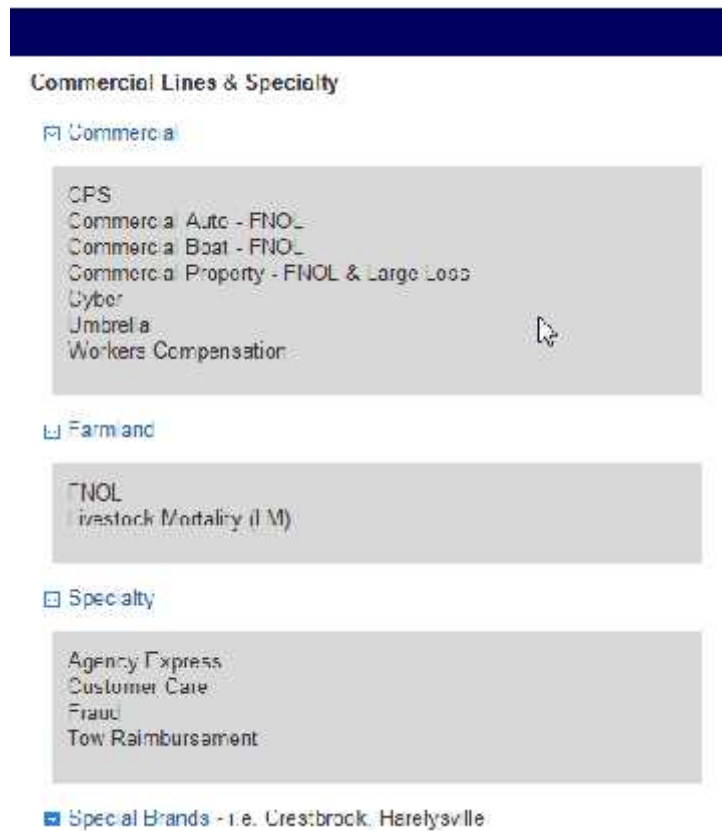|	
⚠	Error, Stop, Warning, Negative

	Alert, Caution
	Confirm, Go, OK, Positive

Empasizing Text Examples

Color

Use consistent colors to reinforce the meaning of the information, but use it conservatively.

Separate Information

Call Out Important Information

Binding Suspensions:

System generated comments are added anytime a suspension is declared or lifted (i.e. **Policy # Binding Suspension Declared, Do Not Reinstate/Reissue**). If applicable, add comment and next step the ticket (processed from the Binding Suspension spreadsheet).

Boldface, Italics

Bolding and italicizing text helps draw the user's attention to important information, but **do so sparingly**. Bolding is preferred as too much italicized text can be difficult to read.

In this example, consider using a heading for the questions in a larger font size.

4). What if the caller asks for a rental car after the tow referral is complete, but they do not want to complete the claim reporting process?
You may call Enterprise on the customer's behalf to set up the rental reservation or you may provide the caller with the Enterprise contact information. See PLRM944 for rental workflows.

5). What if the caller is undecided about the "tow to" location when the tow vendor asks?
(Accident Scene Tow only) If the caller has accepted the Auto Repair Network, use this as the "tow to" location. If the caller does not accept the Auto Repair Network, the representative from the tow facility provides the customer with the information of the tow company's recommended or preferred lot.

6). Can we offer towing service to a claimant when they are reporting a claim and their vehicle is not drivable?
No, all of our towing services are exclusive to insured vehicles that have COLL and/or FTC coverage.

7). Can we cancel a tow if a member requests?
Yes, call 866-560-8638 to cancel RSA Service, or 877-638-9367 to cancel Accident Scene Tow service.

8). Can we offer towing service to the driver of the insured vehicle when the driver is not listed on the policy?
Yes, the person driving the insured vehicle can accept the tow

9). If the police have already called for a tow truck to come and pick up our policyholder's vehicle from the accident scene, should we still offer the Accident Scene Towing?
No, continue with the claim as needed

Underlining

Avoid underlining content to minimize confusion with clickable links.

Before

Examples:
- When one agent quotes and another agent binds: QTR/Gibsoa10, BDR/Hoskinr1
- When one agent quotes and binds: QTR/BDR Gibsoa10

After

Capitalization

Capitalizing words should be used to highlight keywords and insurance terms, but do not overuse. Avoid using ALL CAPS.

Before

After

Type of Text	Example	Rule
Page Titles	Road Side Assistance	Use title case: 1. Capitalize first word and

Headings	Towing Workflows Procedures Verifying Coverage	all following words except articles, conjunctions, and prepositions. 2. Do not use period (.). 3. Do not use colon (:).
Subheadings Links	Descriptions	Use sentence case. No punctuation Links – They are sentence case if they begin a sentence, all lower case if they are within a sentence.
Content		Use sentence case. Use punctuation

Lists / Bulleted information

Use lists to break out the main points of large paragraphs. Provide a header or introductory text to give the list context.

HTML lists are either ordered or unordered. By default, ordered lists <ol> provide a counter marker, either numeric or alpha. Default unordered lists <ul> provide plain bullet markers.

Use lists in this style:

- Capitalize the first word.
- Strive for parallelism in your list. If you use a verb to start the first bullet, use verbs to start every bullet.
- Use a period in a bulleted list only if the copy is a complete sentence. Do not use a period if the copy is a fragment or single word.
- Avoid using more than seven bullets in a list.
- Avoid using more than two sets of bullets on a page.
- Use bullets (unordered list item markers) in a list unless you are writing steps in a procedure or ranking elements, in which case use ordered list numbers. Use the bullets that are native to the font used in the list text rather than graphic bullets.
- Avoid using "and" before the last bullet item.

7. Set expectations with the customer – next steps

Once the policy is sold, set expectations with the customer for the next steps, including:

- Welcome packet

- Inspection process   required on all Homeowners and Dwelling Fire policies, performed by either a Nationwide employee or third party vendor

- Billing – advise the customer when the next bill will be due

- Trailing documents