How to design
a fit for purpose document

Good writing starts waaaaay before the writing...

Shelly Davies

writing joy & badassery

Think first, write second

S

Specify your goal

I

Identify the readers

F

Filter the information

T

Test the plan

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The three functions of a document

Different places for different readers

At a glance

Executive summary

For busy skimmers

Tell the story

Body

For people who will want more

Show the evidence

Appendices

For the experts and the details-oriented

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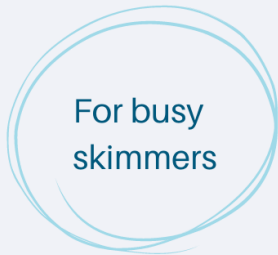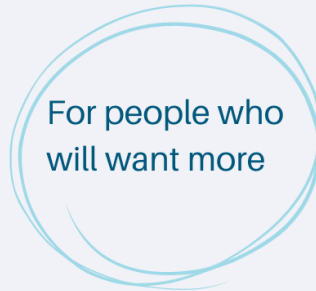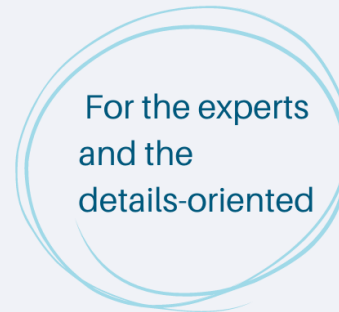
Your doc title here

The purpose of my document is to…
It has to work most for **PRIMARY** but I'm also thinking about the needs of **SECONDARY**

At a glance	Tell the story	Show the evidence
•	•	•

Specify your PURPOSE

1.   *What does this document need to ACHIEVE?*
2.   *If it works, what will HAPPEN?*

- We need a short, high-level statement
- This is for you, not the reader
- It needs to be observable, tangible
- It needs to be a verb

"The purpose of this document is to:"

- PERSUADE X to do Y
- Get buy-in
- Plant seeds in preparation for next steps
- Reassure…
- Remind…
- Request…
- Alert risk
- ~~Make aware, or inform~~

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Identify your readers

3.   *WHO might read this document?*

4.   *WHICH of those readers has the ability, position, or authority to make my document achieve its PURPOSE?*
     (Who does it need to work for the most?)

- You now have PRIMARY and SECONDARY readers

- We care about ALL their needs

- But the PRIMARY readers' needs have to come first

5.   *Are there any UNINTENDED readers?*

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Readers

Who do I want to see this document?

Intended readers

Who does it need to work for the most for my writing to achieve its goal?

Primary readers

Everyone else!

Secondary readers

Who do I NOT want to see this document?

Unintended readers

Document handling, security settings?

Removing or avoiding specific details?

Don't write it at all?

Filter information

6. *What MIGHT need to go into this document?*

7. *What USUALLY goes into this document?*

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Filter information

Dump

Do a brain dump – get it ALL out – without filtering.
- Brainstorm
- List
- Post-it notes
- Free write

Chunk

Now group the information into related chunks. This way you avoid duplication and identify gaps.

Label

Give each chunk a descriptive label. Use a phrase, not a single word topic, like
- How we got here
- What we found
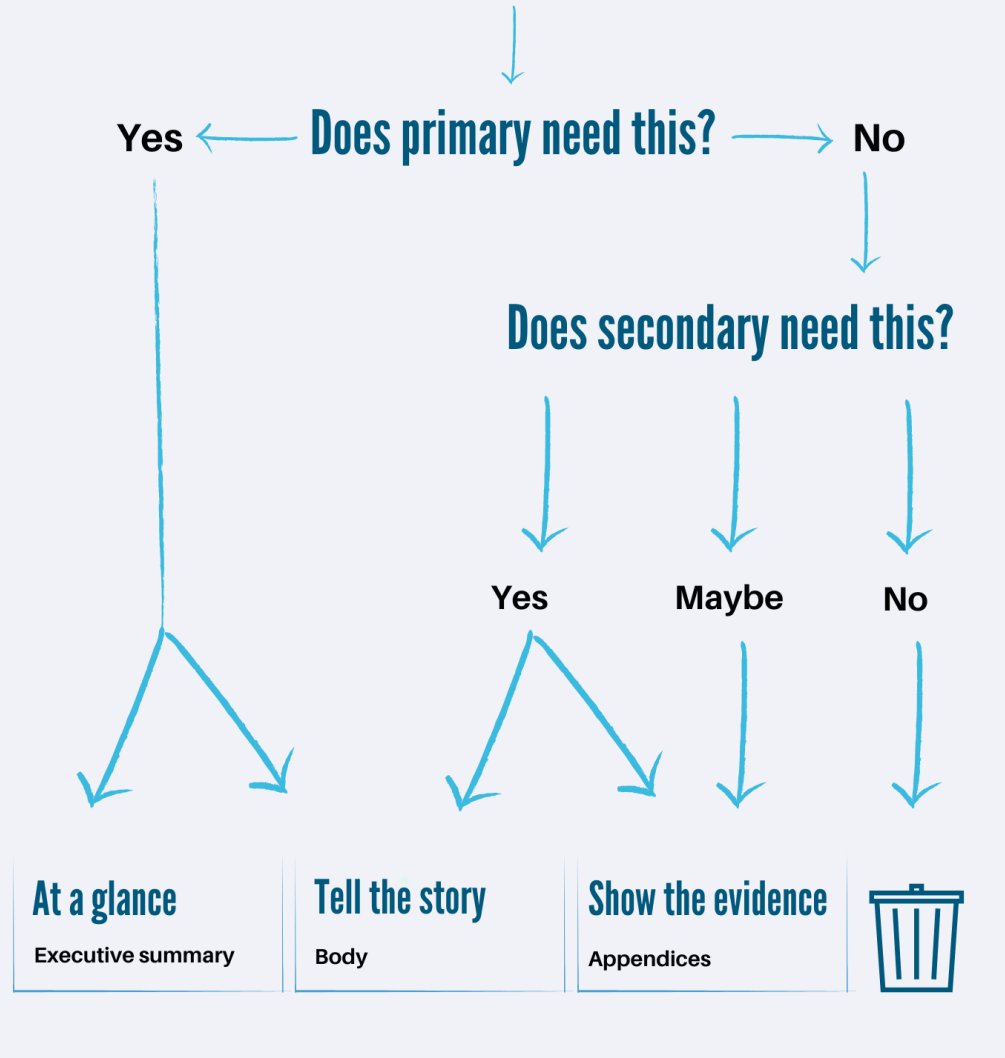- What still needs to be done

Filter information

8. *Does my PRIMARY reader NEED this*
   for the document to achieve its PURPOSE?

9. *Does my SECONDARY reader NEED this*
   for the document to achieve its PURPOSE?

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The magic filter

Pick a chunk

Does primary need this?

Yes ← → No

Does secondary need this?

Yes   Maybe   No

At a glance

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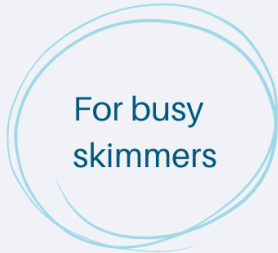
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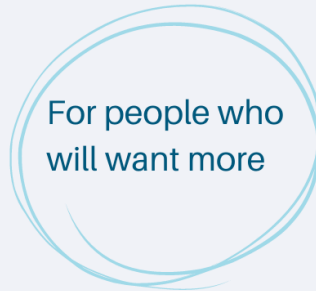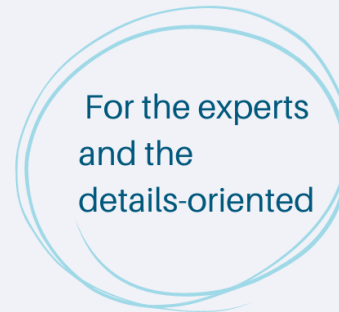
Headings show the hierarchy of ideas

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BLUF

Sub idea

Sub-sub idea

Heading 1

Heading 2

Heading 3

Welcome to your policy

About your policy document

You can cancel your cover within 30 days

How and when we communicate with you

Get to know your policy document

Defined terms you'll find in your policy document

Common terms you'll find in your policy document

How to make a claim

Now you have a plan

The purpose of my document is to...
It has to work most for **PRIMARY** but I'm also thinking about the needs of **SECONDARY**

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●	●	●

Test your plan

10. Does it WORK?

- Testing is a simple conversation
- Test with peers
- Test with coworkers from different departments, family, friends
- Test with READERS

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SIFT before you start writing

S **Specify your goal**
- If your document works, what will happen?
- What does your document need to achieve?

I **Identify the readers**
- Who does it need to work for the most for your writing to achieve its goal? · · · · · · ▸ **Primary reader**
- Who else might read it? · · · · · · · · · · · · · · · ▸ Secondary
- Who would you not want to see it? · · · · · · ▸ Unintended!

F **Filter the information**

Dump	Throw it all down in a brainstorm
Chunk	Group the info in related chunks
Label	Give each chunk a label
Filter	Does your primary reader need to know this chunk to achieve your goal?
Order	Put the chunks in order of importance to the reader

T **Test the plan**
Test the plan with someone else. Have you missed anything?