



## Adding Demonstrations To Online Help

Rob Houser  
Founding Partner



## What Is a Show Me Demo?

- Brief movie that shows and explains a procedure
- Emulation of the over-the-shoulder expert instruction method




## Over-the-Shoulder Training

- User has question and walks across hall
- Knowledgeable neighbor: “Let me show you”
  - Announces goal or task to be demonstrated
  - Demonstrates the procedure
  - Comments on what appears along the way
  - Explains what to do at decision points
  - Provides advice about best practices
  - May prepare the user to solve potential problems by explaining what’s going on under-the-hood




## Why Use Show Me Demos?

- Illustrates unfamiliar or complex procedures more clearly than text-based instructions
- Motivates users to try the procedure
- Sells the product (pre and post purchase)



## When Should You Use Them?

- Unfamiliar techniques or environments
- Procedures that are complex or span multiple locations in the user interface
- Concepts or procedures that are vital to using the system effectively
- Known problem areas for users
- Help is primary source of user training



## Types of Show Me Demos

- Guided Tour
- Scenario-based Demonstration
- Feature Demonstration
- Procedure Demonstration

## Identifying the Need

- You don't need to develop demos for all procedures
- Focus on the areas of greatest benefit to the most critical users
  - New features of a release
  - Areas resulting in most support calls or failures
  - Ignored features of a product (with potential for benefits to users)
- Reinforce key business initiatives



## Planning the Demo

- Focus on one task
- Rehearse and time the task
  - Attempt to keep it under 3 minutes long
  - Think about what data and source materials you need to demonstrate the task
  - Can you get non-proprietary data?
- Record the task to identify transitions and actions that may not appear in the recording



## Making Technical Decisions

- Screen resolution
  - You need to capture an area smaller than the target resolution for your help
  - In some cases, you may only record a portion of a window
- Narration
  - Adds bandwidth
  - Allows users to look around rather than read



## Deciding What To Show

- Don't try to show everything/everyway
  - If there are variations of a task, either pick the most common option or create additional demos
- Provide realistic data
  - Users can turn specific, contextualized steps into general steps more easily than the other way around



## Deciding What To Say

- Pretend that you are the expert giving the user an over-the-shoulder demonstration
  - Briefly describe the goal
  - Show the user how to perform the task
  - Explain the reason behind the procedure
  - Give advice throughout the demo (shortcuts and best practices)
  - Only include conceptual information where it is important to completing the task
  - Prepare users for well-known problem areas



## Involving the User

- Don't try to make most show me demos interactive
  - No simulations
  - No branching
  - No assessments
- Allow users to start, pause, and exit the demo
- If demos have a large section that some users may know, you can give them the option to skip ahead



## Creating a Storyboard

- Generate a printed version of the initial capture to use as the basis of the storyboard
- Add narration using conversational language
- Keep captions to 1-2 sentences
- Include ready state and objects needed for each frame
- Include actions to take during the demo in the script



## Capturing the Action

- Use the cursor movement and highlight boxes to direct the user's attention to key areas before explaining them
- Be consistent with the arrows and/or boxes you use to highlight areas
- Use Print Screen to capture additional frames



## Creating Transitions

- Use slides to introduce the demo and make transitions between gaps in the procedure
- Transition slides are the main way you can "brand" your demos
- Good place to include graphics (with scenarios, the graphics may be pretend users)
- Use captions to forecast what is happening next



## Adjusting the Timing

- Pause between steps to give the users time to reflect on what they see
- If the timing seems just right to you, it's probably too fast for your users
- Maintain a consistent order
  - Get the user's attention (highlighting, cursor movement)
  - Tell them what to do AND why they do it (explain)
  - Show them what to do
  - Provide advice
  - Transition to the next sub-step



## Adding Navigation

- Usually let demo play without requiring user to click through each screen
- Provide navigational controls to pause, rewind, and fast forward
- Provide way to exit (users don't always realize they can just close the window)



## Reusing Show Me Demos

- Link to demos from the procedure topic in the help and from a help topic listing all demos
- Integrate show me demos into the product with direct links to the demos
- Create a single-page on the website, possibly under customer support, to provide access to show me demos
- Add show me demos to the knowledge base
- Use show me demos as the basis for WBT, adding simulations, exercises, and assessments



## Launching Show Me Demos

- Make sure the link appears at the top of the help topic
- Provide a single help topic that provides access to all show me demos in the help
- Open a new window for show me demos
- Turn off extraneous browser elements
- Maximize the window



## Drawbacks to Demos

- Takes longer to develop than text-based procedures
- Presents challenge for translation
  - Screen images are difficult to replace (although captions are easy to translate)
- Creates more materials that need to be updated for each release (maintenance)



## Advantages to Demos

- Motivates users to try procedures and explore the product
- Builds expertise
- Increases the perception of quality in your product (and help)
- [Often increases the profile of the help internally]



## Starting to Use Demos

- Start with a high profile project
  - Try to help solve an organizational problem or advance an important strategic objective
  - Devise a method of measuring the effect of the demos (on performance and satisfaction)
- Put them everywhere you can
- Publicize their existence with users (and customer-facing associates)
- Measure the success of the demos and publicize it



## Conclusion

- Show Me demos can add another layer of instruction to your online help
- Be selective and strategic in where you implement them
- Don't overextend your team's ability to maintain what you create



## Thank You!

Rob Houser, Founding Partner  
User First Services  
[www.userfirst.net](http://www.userfirst.net)  
[rob@userfirst.net](mailto:rob@userfirst.net)  
404-797-9350

