5 Best Practices for Creating Useful Templates for Engineers

Too often, companies create templates for their engineers so they can say they have them. Few bother to figure out if they work or if they're usable. Yet, poor templates and ineffective template practices risk:

- Templates not being used or being used incorrectly
- No assessing to see if templates result in better documents or should be changed
- Templates failing to provide guidance so writers are confused about how to use them

The idea behind templates is solid in that templates are the first step toward creating a standard. Yet, templates are often either too rigid, not rigid enough, or simply useless.
For instance, a template that provides the sections of a document that must be included can be helpful if every situation calls for the same section, but that's not always the case.
Too often, templates aren't useful because writers have different ideas about what should be included in each section. Thus, guesswork begins to play a major role in how templates are created and used, thereby leading to miscommunications, frustrations, and inefficiencies in writing.

How can a company create templates that writers will use and that result in better documents? Here are five guidelines:

1. Get writer input.
You heard that right—too often, templates are created without considering who will actually use them and if the templates work for that user. Writer input can ensure that the templates are usable and user-friendly and that writers will actually use them.

2. Include guidance.
Tell writers what each section of a document should or must include. Guidance allows leadership to indicate what the document should or must include, thereby making the document easier to write and achieve its goal.

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3. Explain the why and function of each section.

Writers should know why each section exists, the function of each section, and how the sections work together to create logic. When writers understand this, they'll be better prepared to use the template to write better documents.

4. Show writers the intent of the document by providing examples.

These examples should include explanations of why one example is preferred over another; this will guide them to make better decisions.

5. Train writers on using the template.

Writers must be taught how to use the templates; too often, the assumption is that how to use a template is obvious, when it's not. When writers are given instructions on template use, the team will be more likely to use them.

Templates are only as good as their usefulness and usability. If they're not being used or used incorrectly, it's probably because the template isn't useful or your team doesn't understand how it's meant to be used.

If your company does use templates, have you assessed how they're being used and if they're being used correctly?

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Application Tool

Element	Answer
Do writers use the templates correctly?	
What questions come up regularly about the templates?	
Has leadership assessed the templates for their usefulness?	
Are the templates updated regularly to reflect changes in the organization and/or clientele?	
Do the templates include guidance or do they simply provide sections?	
Are writers asked for their feedback about the templates and their usefulness?	
Are writers taught how to use the templates?	
Do your templates include examples of what's acceptable and not, while including explanations?	
Have the templates been changed with no rationale for the change?	
Who, if anyone, assesses whether the templates are working for the writer and the intended reader?	

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