

# QRG Format Selector: Which Template Do You Need?

Maps your task type (decision vs. action, high vs. low risk) to the recommended format. Use before you design.

Your task dictates the format. Answer the questions below to choose the right quick reference guide template for your procedure.

**START: Which format does your task need?**

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**Q1:** Does the task require branching logic? (If X, do A; if Y, do B)

YES →

**Decision Tree** — Flowcharts, yes/no branches, troubleshooting guides, triage matrices, form selectors. User navigates; doesn't read.

NO →

**Q2:** How often is the task performed? What's the cost of a wrong turn?

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**HIGH FREQUENCY + LOW RISK**

**Cheat Sheet** — Keyboard shortcuts, error codes, lookups. Dense, one page. Icons over prose.

**LOW FREQUENCY OR HIGH RISK**

**Procedural Checklist** — Numbered steps, checkboxes, sign-off lines. Compliance, safety, audit trail. No skipping.

## QUICK RULE

Mismatch the format to the task, and adoption plummets. High-stakes, multi-branch work belongs in a decision tree. Low-stakes, linear work does not.

# Format Summary

FORMAT	WHEN TO USE	EXAMPLES
<b>Decision Tree</b>	Complex logic, multiple branches, troubleshooting	Triage matrix, diagnostic flow, "which form do I need?"
<b>Cheat Sheet</b>	High-frequency, low-risk, quick confirmation	Shortcuts, credentials, error codes, lookups
<b>Procedural Checklist</b>	Linear, high-risk, auditable, compliance	Security incidents, safety procedures, sign-off required