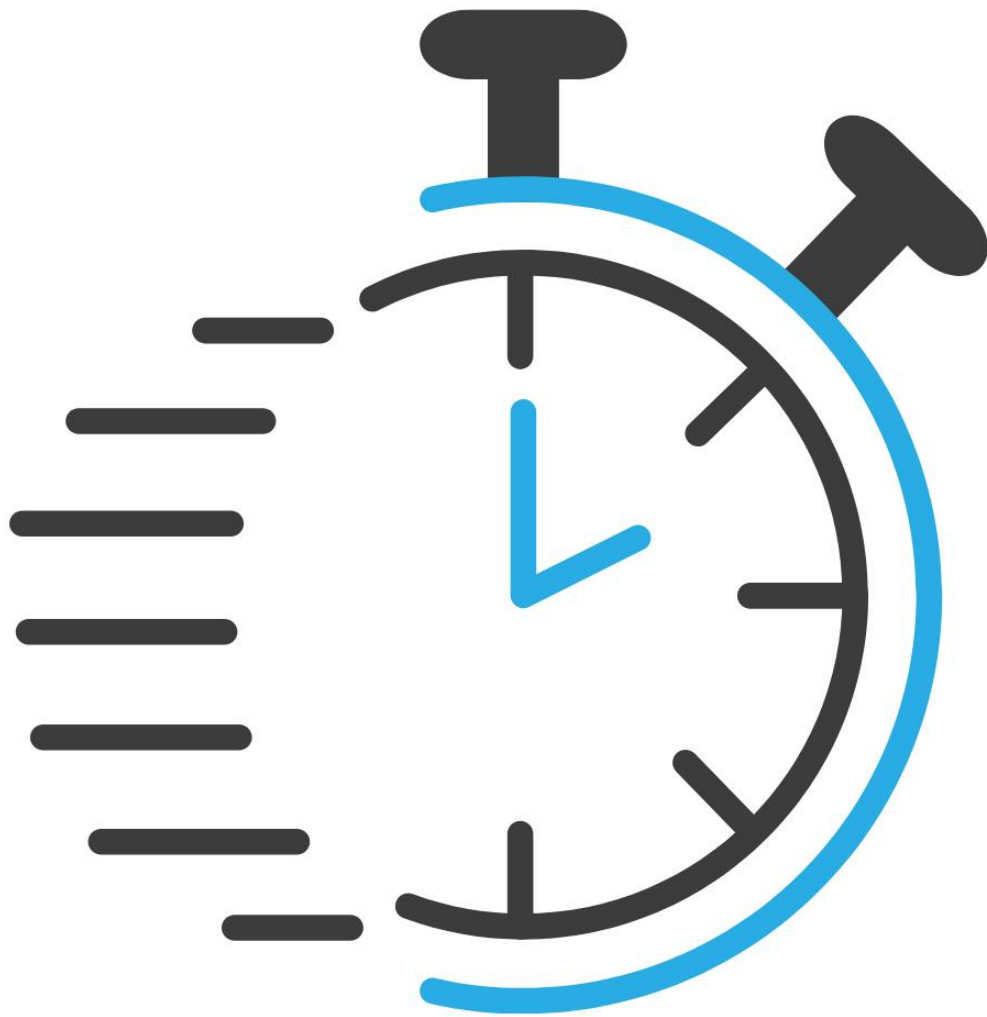


# **Microsoft Word**

## **for Marketers:**

### **A Time-Saving Guide**



By Julia Bragg

# **Microsoft Word for Marketers:**

## **A Time-Saving Guide**

**Written and designed by Julia Bragg**



# Dedication

I am dedicating *Microsoft Word for Marketers: A Time-Saving Guide* to Daniel Macomber and Maya Evans for their valuable insights about the marketing industry and offering me support in the creation of this manual.

# Acknowledgments

I would like to acknowledge Daniel Macomber and Maya Evans for their assistance in my user research and participating in my usability tests. I am also thankful for the feedback given by Professor Janine Solberg and my peers in English 380.

# Introduction

Are you a marketing professional looking to save time creating documents? *Microsoft Word for Marketers: A Time-Saving Guide* is designed for marketing students and professionals who want to gain a deeper understanding of Microsoft Word 2024 for Mac. This guide teaches time-saving skills to optimize efficiency when creating documents in Microsoft Word.

If you're looking to become more adept at Microsoft Word, seamlessly create cohesive documents, and efficiently write content, this manual is for you. By applying the skills outlined in this guide, you'll be able to prioritize client needs, collaborate effectively with your team, and maintain an organized portfolio of marketing materials. This manual will help you streamline content creation and editing, saving you valuable time in your daily work.

Use this manual to learn how to:

- Customize your Microsoft Word Ribbon and Toolbar
- Design high-quality documents using templates and themes.
- Streamline your writing and revision processes.
- Effectively distribute documents to your team and clients.

*Microsoft Word for Marketers: A Time-Saving Guide* is organized into four sections, each aligned with the stages of the writing process. Through written instructions and visual guides, you'll learn how to apply these tools directly to your work. Look out for callout boxes containing helpful notes and additional important information.

With this guide, you'll complete tasks faster, create visually engaging documents, and significantly improve the efficiency of your marketing team.

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# Chapter 1: Customizing Your Workspace

What you'll learn in Chapter 1:

- Modify tools in your Quick Access Toolbar
- Customize your Home ribbon
- Create default font and text settings
- Utilize Styles to create consistent headers and titles

**1.1 Personalizing your toolbar for quick access to essential tools**

**1.2 Adjusting font and text sizes to maintain brand consistency**

**1.3 Use Styles to set headings and titles**

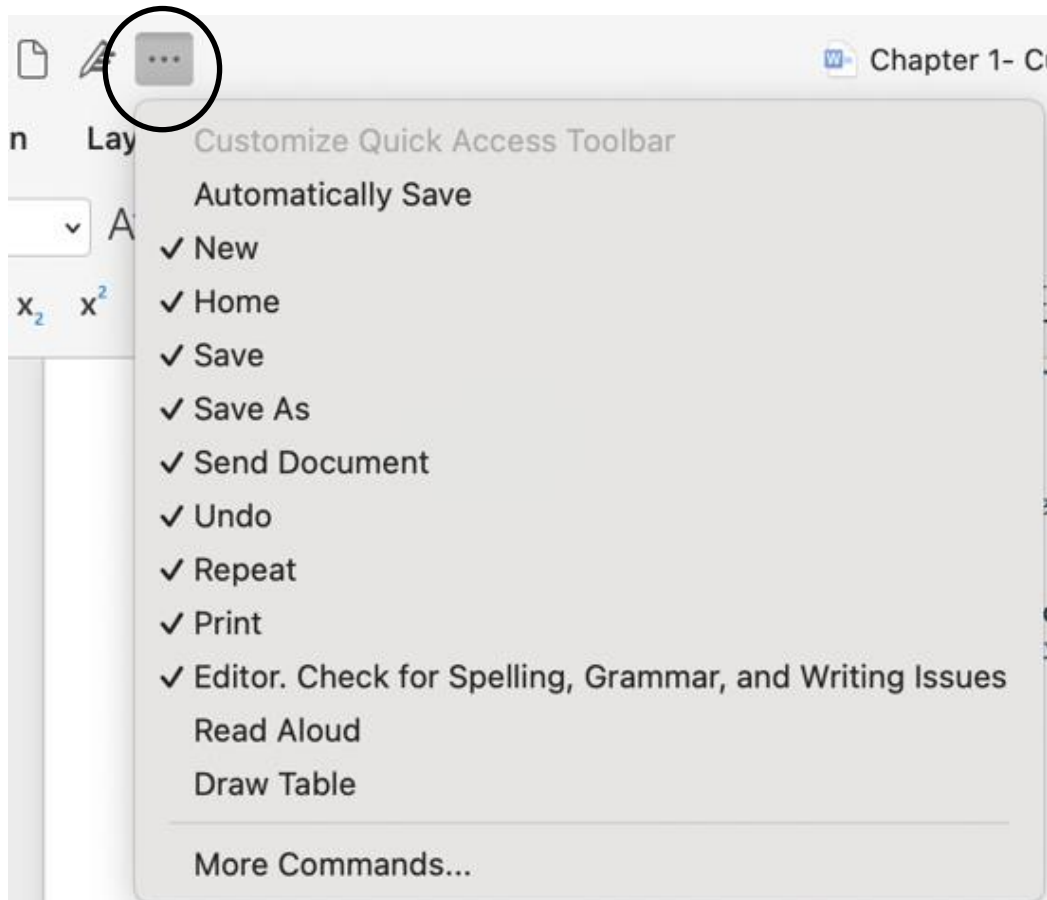


## 1.1 Personalizing your toolbar for quick access to essential tools

*Why is this helpful? Personalizing your toolbar and ribbon helps you save time when editing your marketing documents by highlighting your most essential tools, organizing the layout of features, and creating a personalized workspace to optimize efficiency.*

### Customizing your Quick Access Tool Bar

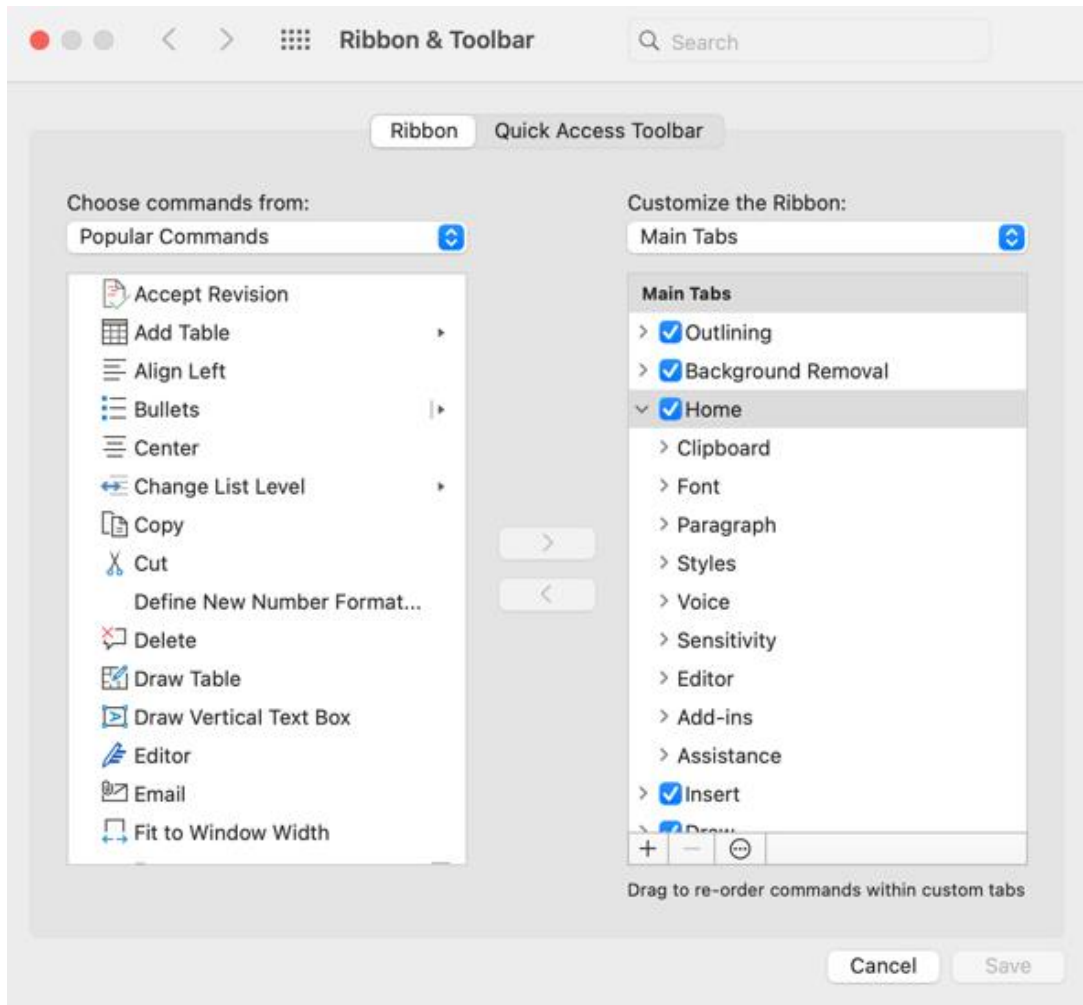
- 1.) Above your main ribbon, click the three dots. A menu opens.



- 2.) Select commands to add to your Quick Access Tool Bar. A check mark appears next to selected commands.
- 3.) Click **More Commands** at the bottom of the menu for more tool options. A window opens, and you can adjust both your QAT and Home Ribbon.

## Customizing your Home Ribbon

- 1.) Scroll through the commands list to select essential tools.
- 2.) Use the arrows to move selected features to your Ribbon.
- 3.) Click **Save**. Your adjusted ribbon features update.

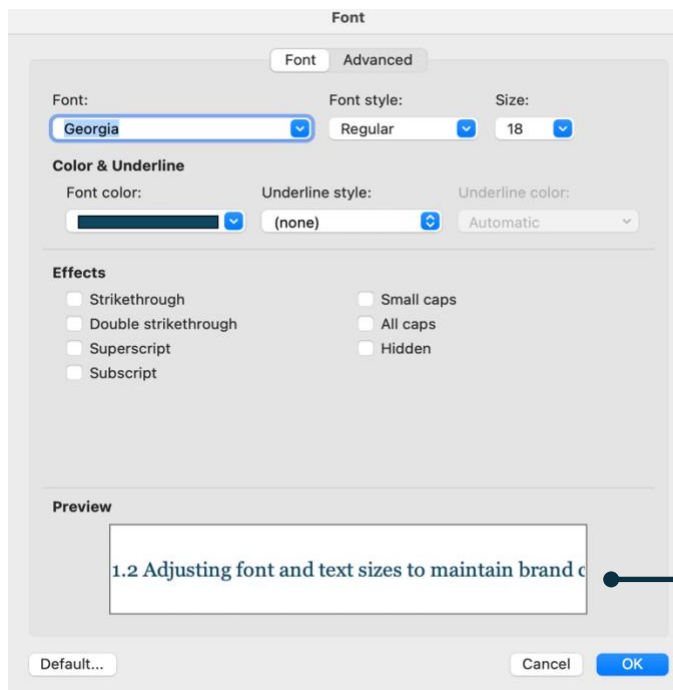


**Note:** You can add and remove features into each tab of your ribbon in this menu.

## 1.2 Adjusting font and text sizes to maintain brand consistency

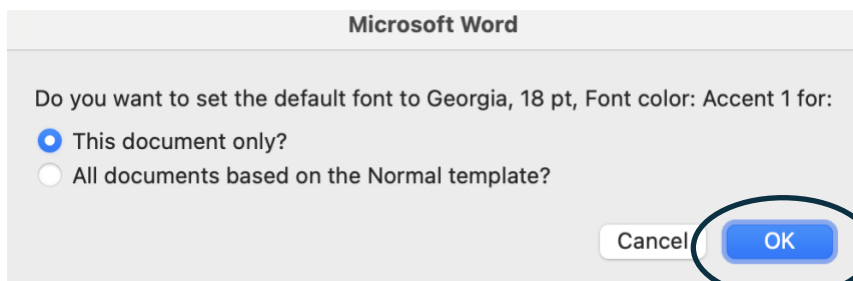
*Why is this helpful? Setting default font settings helps you efficiently write content for your marketing documents. You can set the font, style, size, and color to maintain consistency within your company's brand.*

- 1.) Click Format and select **Font**. A window opens.
- 2.) Adjust font style, size, color, and effects.



You can preview how your selected settings will look in this box.

- 3.) Select **Default** to set your selections as a default setting. A window opens.



- 4.) Choose to set your default settings to this document only or all documents.
- 5.) Select **OK** to save.

## 1.3 Use Styles to set headings and titles

*Why is this helpful? Using Styles to create headings, titles, and subheadings allows your writing process. You can customize colors, sizes, and fonts in the Styles Pane to keep your text consistent throughout current and future marketing materials.*

### Apply a Style

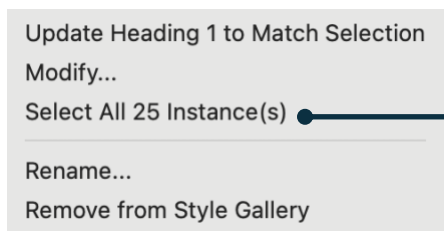
- 1.) Go to the **Home** tab and view the styles banner.



- 2.) Select text and select type of Style you want to apply. The Style is applied.

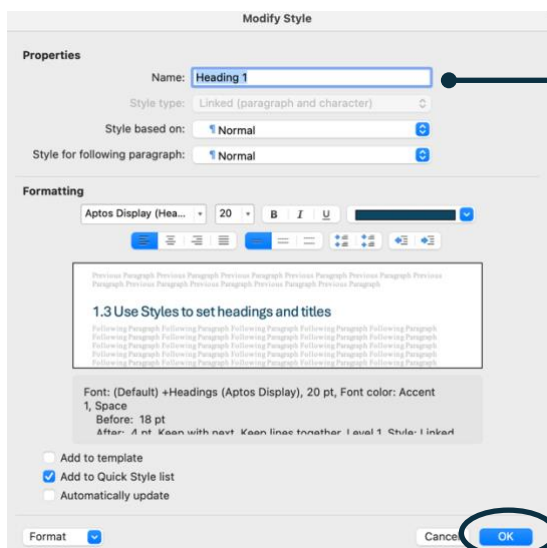
### Modify selected Styles

- 1.) Left click the **Style** box in the styles banner to edit your Style. A menu opens.



Selecting **All Instances** will apply the modifications to each selected Style used within your document.

- 2.) Edit your selected text by selecting **Modify**. The modify Style window opens.

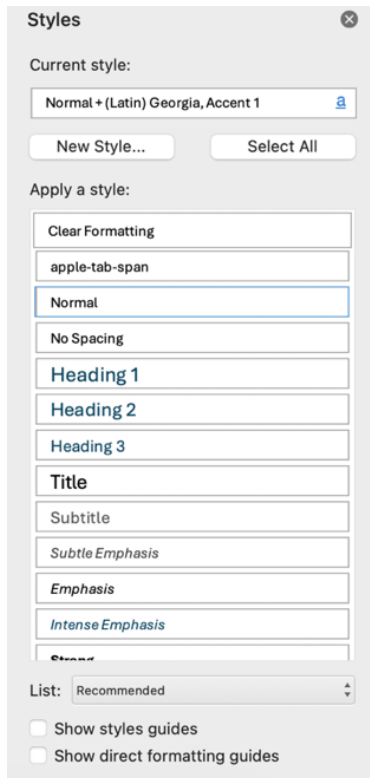


You can label frequently used Styles for accessible and easy access.

- 3.) Modify the size, font, and color of your selected Style in this menu.
- 4.) Select **OK** and your selected text updates.

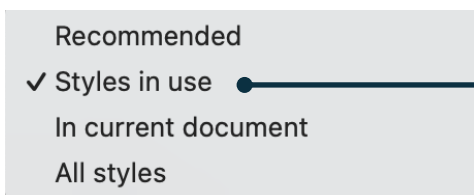
### Using the Styles Pane

- 1.) On the right on the Styles banner, select **Styles Pane**. A window opens to the right of your document:



**Note:** You can apply styles to multiple paragraphs of texts by highlighting or use **Select All** to select used headers in your document.

- 2.) Edit, apply, and select styles in this window.
- 3.) Click **List** to edit the menu of listed Styles. A window opens:



Setting a preferred list of Styles in the Styles pane streamlines editing processes when reviewing your applied styles.

- 4.) Click options to set the list, and a check mark appears next to selected option. Word automatically updates your viewable list of styles.

## **Chapter 2: Designing Efficiently**

What you'll learn in Chapter 3:

- How to utilize Microsoft Word templates
- Insert themes and upload custom themes
- Edit color palettes to adhere to your brand

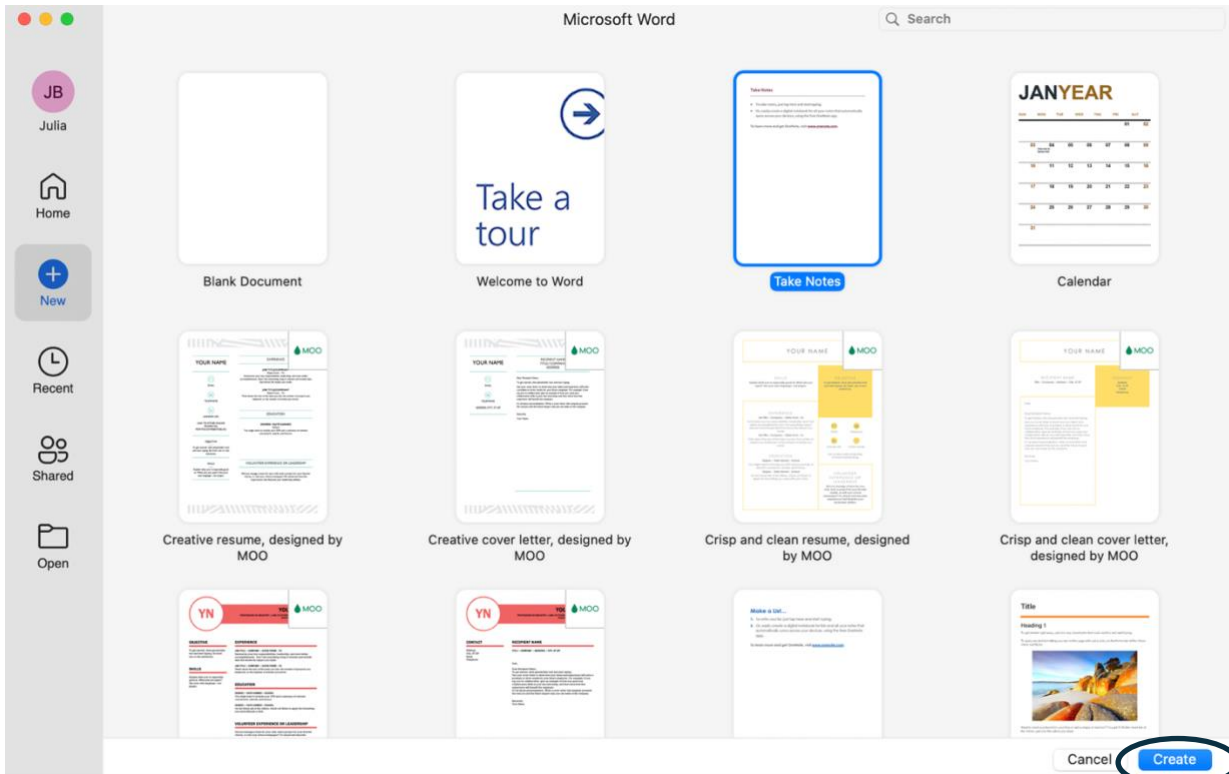
### **2.1 Applying templates for a fast set up**

### **2.2 Using themes to ensure a cohesive brand appearance**

### 2.1 Applying templates for a fast set up

*Why is this helpful? Using a template helps with formatting a marketing document and visualizing the layout. You can use templates as inspiration or use them to input your own content. You can customize the colors, fonts, and images to adhere to your company's brand.*

- 1.) Open Microsoft Word and navigate to the Home Screen.
- 2.) Select **New** on the left side to create a new document.
- 3.) View the list of Templates.



- 4.) Select Template.
- 5.) Select **Create** and a new document with the selected template is created.

**Note:** Microsoft Word has many useful templates that can be used for marketing such as Newsletter, Take Notes, Create an Outline, Brochure, and Business Letter.

## 2.2 Using themes to ensure a cohesive brand appearance

*Why is this helpful? Themes help you write your content with styled fonts, colors, headers, titles, and text to create a visually pleasing document.*

### Inserting a Theme

- 1.) Go to the **Design** tab on your main ribbon.
- 2.) On the left, click the **Themes** icon. A window opens.
- 3.) Scroll through the list and select desired theme.

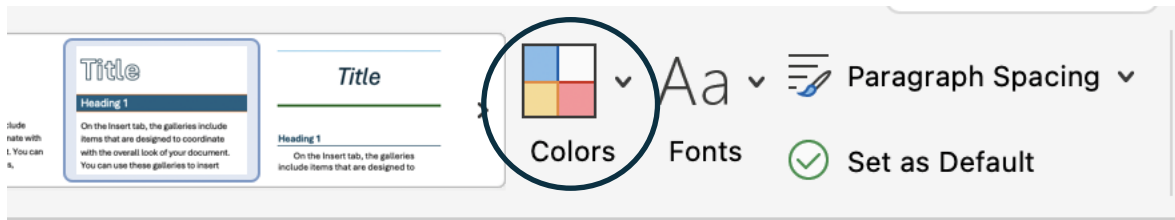


- 4.) Selecting a theme applies changes to your current document.



## Customizing Theme Colors

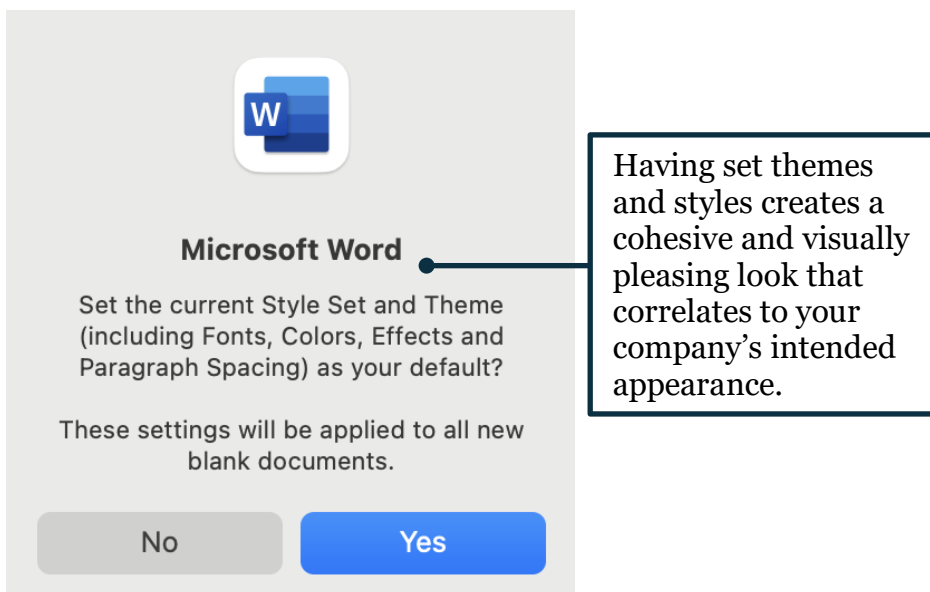
- 1.) Select Colors. A dropdown menu opens.



- 2.) Scroll through default color combinations.
- 3.) Select your desired colors. Your themes color palette updates.

## Setting Default Themes and Colors

- 1.) Select Set as Default. A window opens.



- 2.) Select **Yes**. The current settings are set as default for all future documents.

## **Chapter 3: Writing and Editing your Content**

What you'll learn in Chapter 3:

- Create AutoText entries for frequently used sentences.
- Insert AutoText entries into documents to save time
- Utilize Thesaurus to enhance wording
- Fix frequently misspelled words with AutoCorrect
- Use the Editor to streamline your revision process

**3.1 Using Auto-Text for frequently used phrases**

**3.2 Enhancing your wording with the Thesaurus**

**3.3 Spelling efficiently with AutoCorrect**

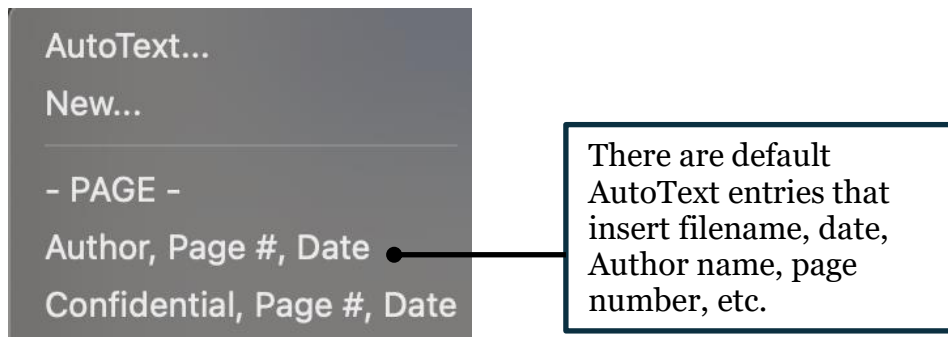
**3.4 Editing seamlessly with the Editor**

## 3.1 Using AutoText for frequently used phrases

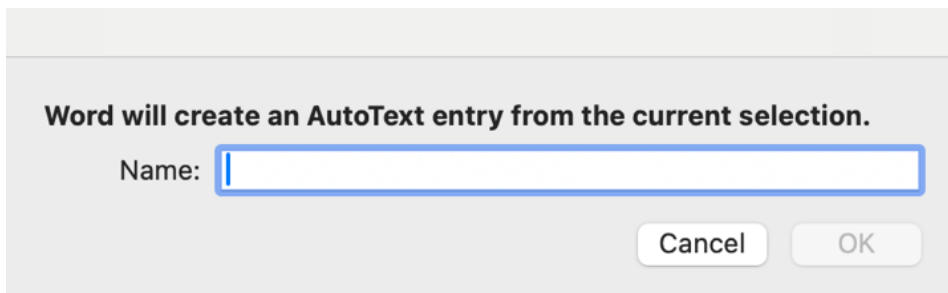
*Why is this helpful? AutoText is a tool that saves frequently used words, phrases, or sentences so that you can insert them seamlessly into your document.*

### Creating an AutoText Entry

- 5.) Select text.
- 6.) In your Mac ribbon, select **Insert** and hover your mouse over AutoText. A menu opens.



- 7.) Select **New**. A window opens.

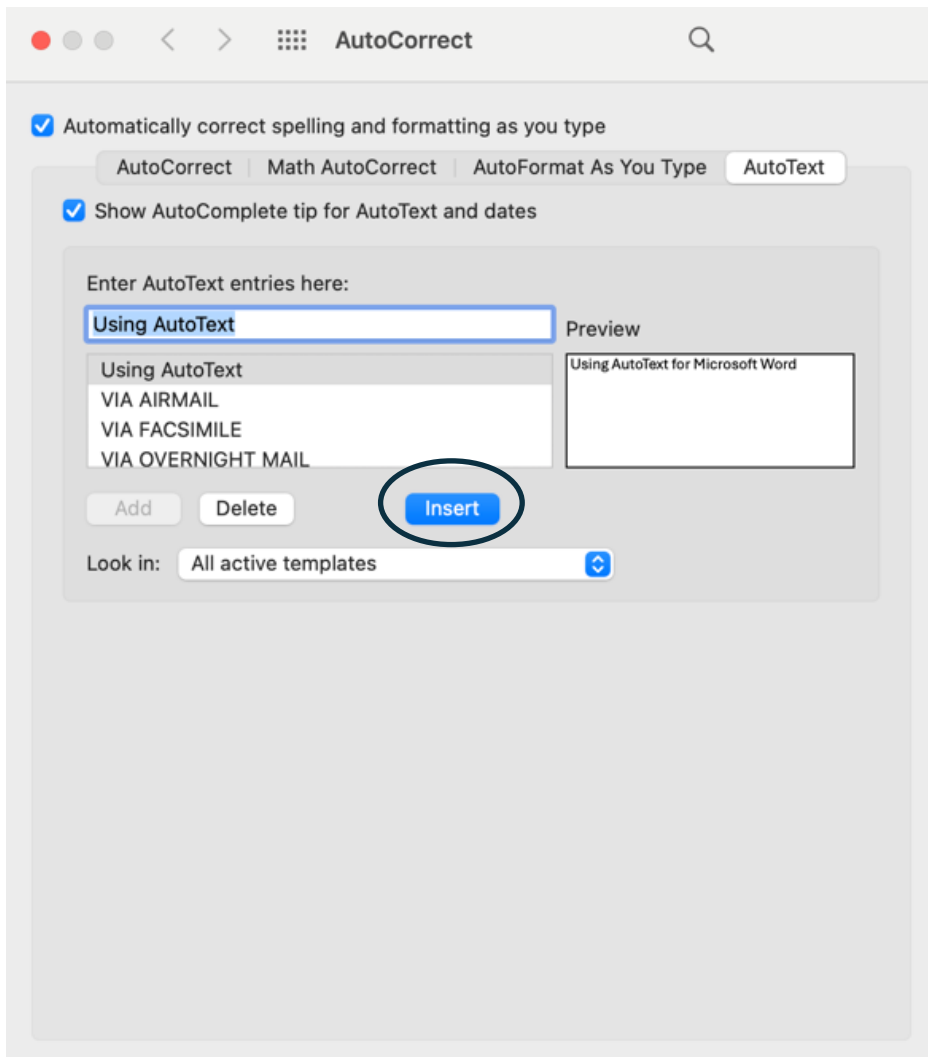


- 8.) Select **OK** to save your AutoText entry. Word saves AutoText entries to insert them into future documents.

**Note:** You select up to 255 characters that you want to make into a reusable snippet.

### Inserting AutoText

- 1.) In your Mac ribbon, select **Insert**. A menu opens.
- 2.) Hover your mouse over AutoText.
- 3.) Select AutoText. A window opens.

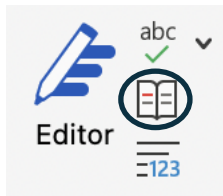


- 4.) Scroll through your saved AutoText entries.
- 5.) Select AutoText snippet.
- 6.) Select **Insert** and the text inserts into your document.

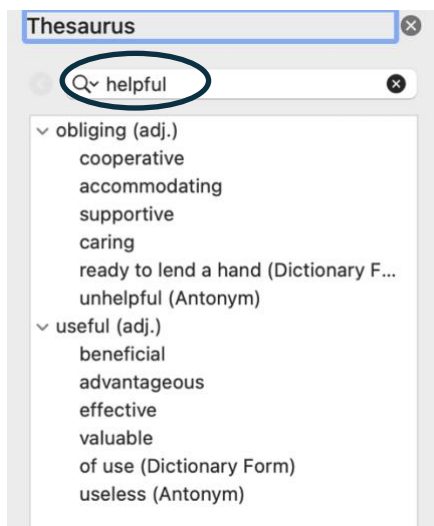
## 3.2 Enhancing wording using the Thesaurus

*Why is this helpful? The built-in thesaurus feature allows you to search synonyms and antonyms for important words in your document. You can utilize this tool to enhance wording, strengthening the overall quality of your marketing documents.*

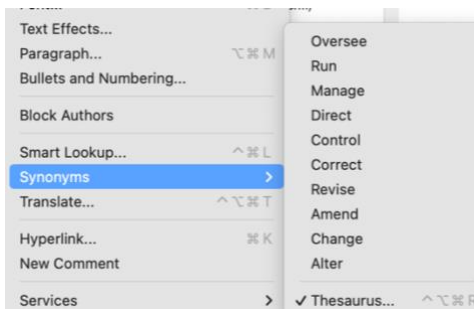
- 1.) Select a word to search for in the Thesaurus.
- 2.) In your home ribbon, select **Review**.
- 3.) On the far left, click the book icon to open the Thesaurus. A window opens to the right of your document.



- 4.) View your selected words list of synonyms and antonyms.



- 5.) Select a synonym and select **Insert**. The word inserts into your document.

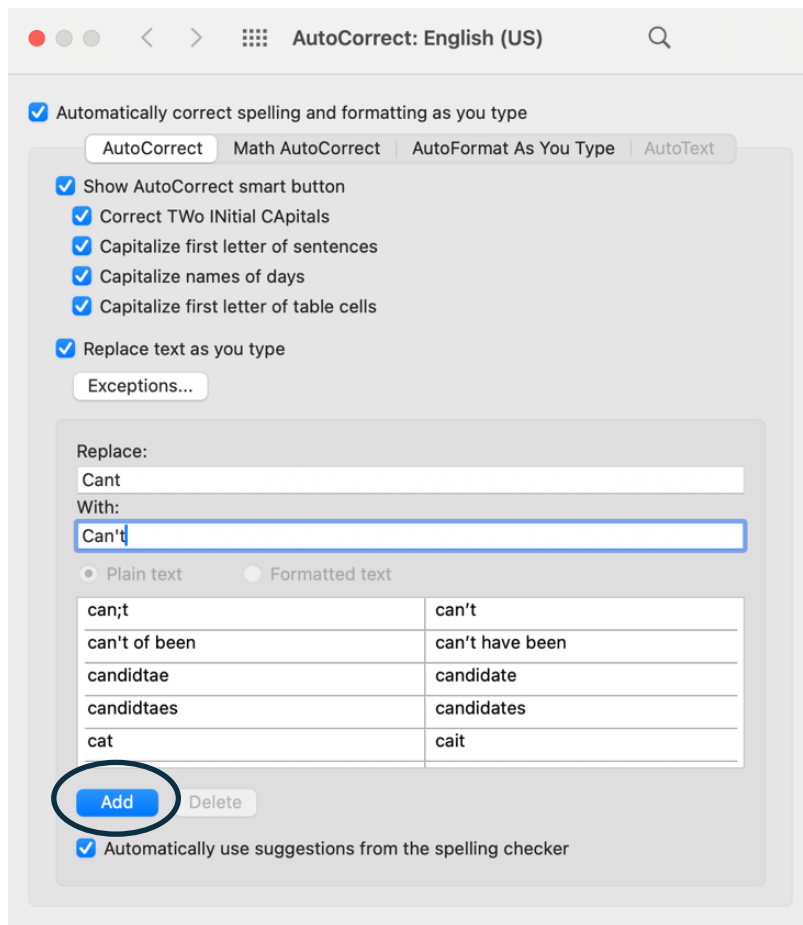


**Note:** You can right-click on any word in your document and view Synonyms to get a quick view of the Thesaurus.

## 3.3 Spelling efficiently with AutoCorrect

*Why is this helpful? Using AutoCorrect to set frequently misspelled words and unique titles saves you time and effort when revising your marketing documents. You can utilize this tool to prevent grammar issues, misspellings, and add any missing punctuation.*

- 1.) On your Mac toolbar, select **Tools**.
- 2.) Select **AutoCorrect** from the dropdown menu. A window opens.

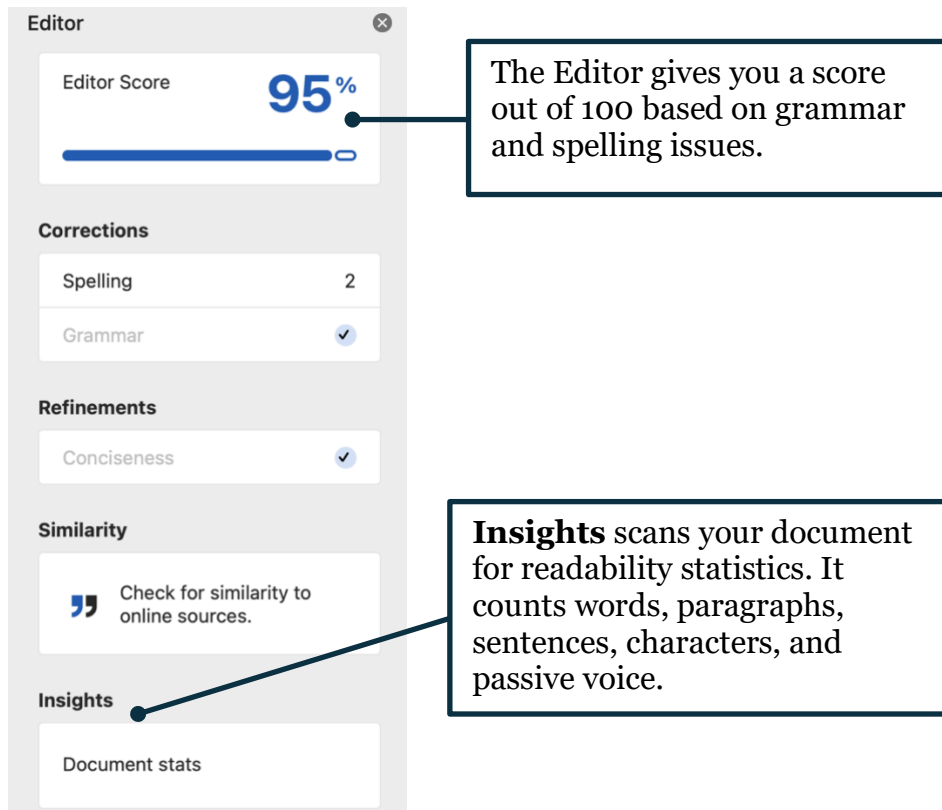


- 3.) Type the misspelled word in the **Replace** box. Type a correction in the **With** box.
- 4.) Select **Add** to save corrected word.

## 3.4 Revising seamlessly with the Editor

*Why is this helpful? Using the Editor feature scans your entire document for spelling and grammar issues, helping you make sure your document is readable to your audience and refined. The Editor also suggests refinements to make to your document and scans it for possible similarity to online sources.*

- 1.) Navigate to the **Review** tab. On the left, select **Editor**. A window opens.



- 2.) Click on **Spelling** or **Grammar** to view misspelled words or incorrect grammar within your document.
- 3.) Select corrected version and your misspelled word is corrected.

## **Chapter 4: Previewing and Sharing**

What you'll learn in Chapter 4:

- View your document in web and print layout
- Share documents efficiently for your team
- Downloading and saving for simple distribution

**4.1 Preview your content in web layout**

**4.2 Sharing your document with your team and clients**

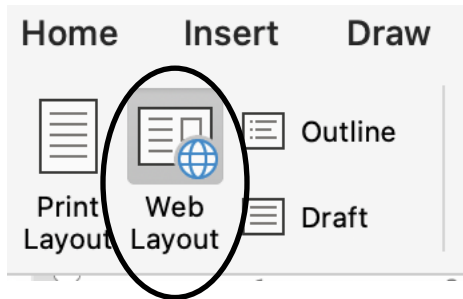
**4.3 Downloading for easy distribution**



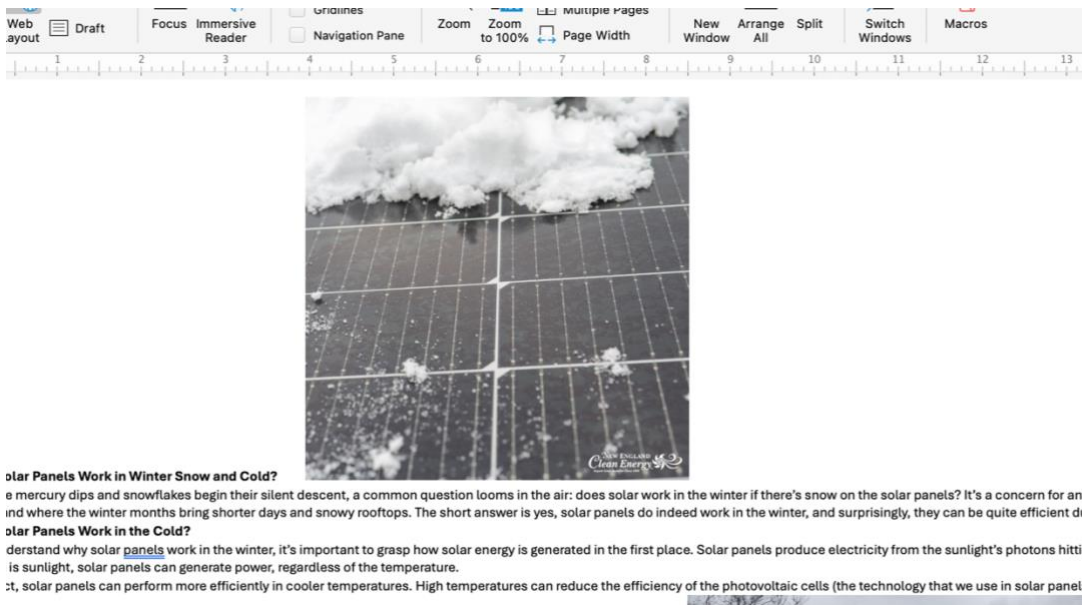
## 4.1 Preview your content in web layout

*Why is this helpful? Viewing your document in Web Layout shows you what it looks like on a webpage. This is a useful feature for visualizing text and images in your marketing materials.*

- 1.) Click the **View** tab on your main toolbar.
- 2.) On the left, select **Web Layout** to preview your document.



- 3.) View your document. This mode removes page breaks and margins so you can observe changes and make edits.



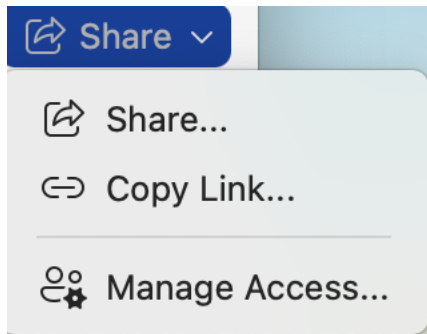
**Note:** Editing your marketing document in this mode will ensure a smooth process when uploading it to your company's webpage. You can rearrange images, inserted icons, and chunks of text according to your desired layout.

## 4.2 Sharing your document with your team and clients

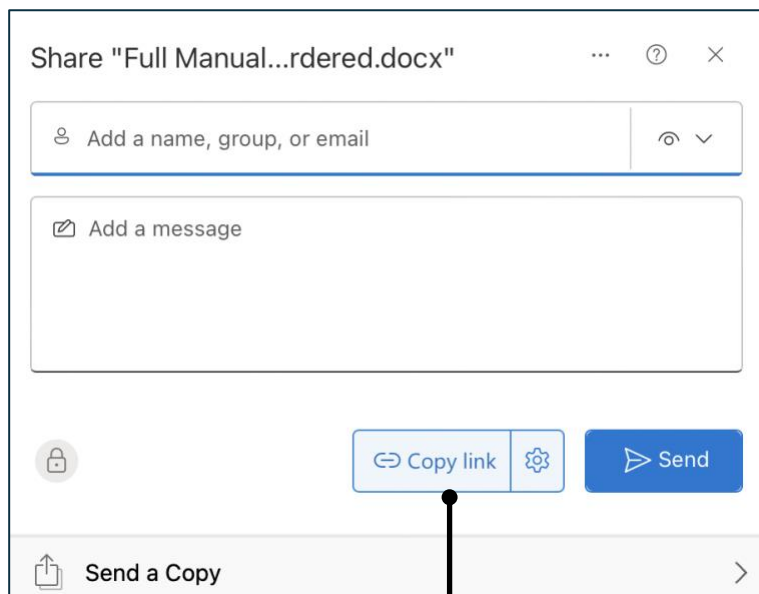
*Why is this helpful? Sharing your document allows your team to review content, collaborate on revisions, and improve overall visibility. This process ensures everyone stays aligned and reduces time spent on back-and-forth communication, making your marketing efforts more efficient.*

### Share via Email

- 1.) On your Home ribbon, select **Share**. Select One Drive or SharePoint to set location.



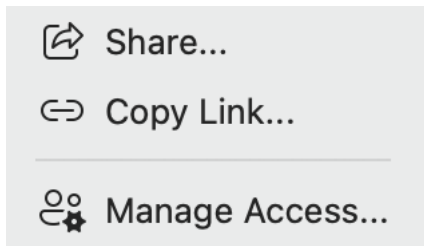
- 2.) Click **Share**. A window opens.
- 3.) Add names, groups, emails, or a message. Click **Send** to share.



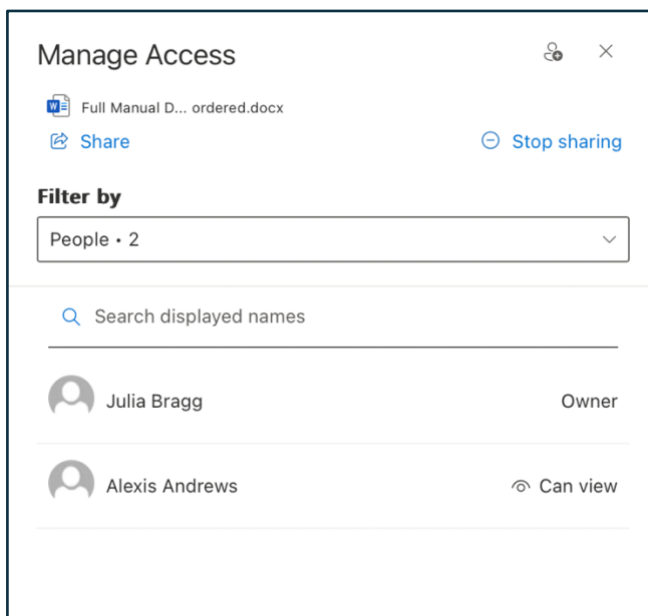
You can select **Copy link** to copy your document link to your clipboard.

## Managing Document Access

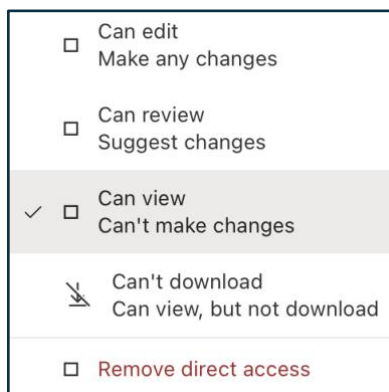
1.) Select **Share**. A window opens.



2.) Select **Manage Access**. A window opens.



3.) Select shared person's names. A menu opens.



4.) Select options to edit access for shared members of your document.

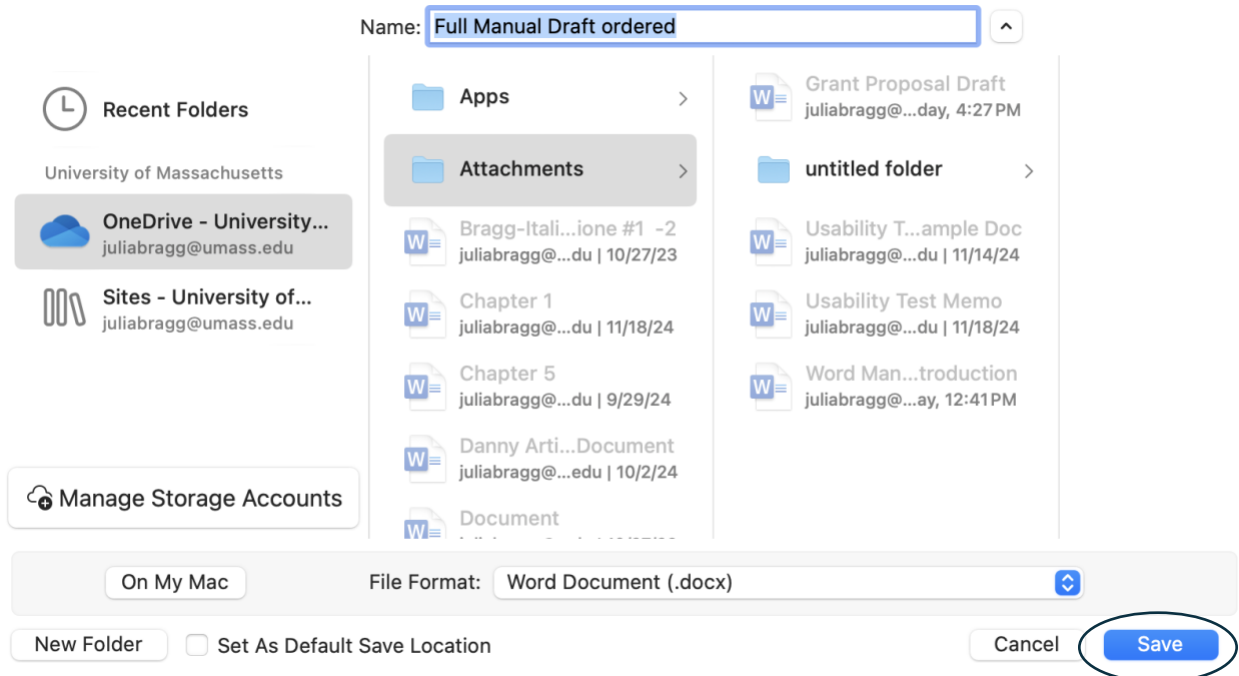
## 4.3 Downloading for easy distribution

*Why is this helpful? Downloading your content will allow you to save it for future use, add to your portfolio, and organize multiple documents into a folder.*

- 1.) On your Mac ribbon, select **File**. A menu opens.



- 2.) Select **Save a Copy**. A window opens.



- 3.) Create a title, select location, and select file format.
- 4.) Click **Save** and your document is downloaded.

**Note:** Marketing documents are most widely saved as PDFs. PDFs maintain consistent formatting, allow for easy printing, promote accessibility, offer security, and allow for simple sharing across platforms.

## Keyboard Shortcuts

Module	Action	Mac Keyboard Shortcut
<b>1.1</b> Personalizing your Toolbar	Open Word Preferences to customize the toolbar	Command + ,
	Customize Quick Access Tool Bar	Click <b>Tools &gt; Customize Toolbar</b>
<b>1.2</b> Adjusting Fonts	Open Font Preferences	Command + D
	Increase Font Size	Command + Shift + >
	Decrease Font Size	Command + Shift + <
<b>1.3</b> Using Styles	Apply Heading Style	Control + Option + 1 (or 2)
	Open Styles Pane	Option + Command + Shift + S
<b>2.1</b> Applying Templates	Open a New Document Template	Command + N
<b>2.2</b> Using Themes	Open Design Tab for Theme Settings	Click <b>Design &gt; Themes</b>
<b>3.1</b> Using Auto-Text	Insert Auto-Text Entry	Type the shortcut and press F3
<b>3.2</b> Using the Thesaurus	Open Thesaurus	Control + Command + R
<b>3.3</b> Spelling with AutoCorrect	Run Spelling and Grammar Check	Option + Command + L
<b>3.4</b> Using the Editor	Open the Editor	Command + Shift + E
<b>4.1</b> Preview in Web Layout	Switch to Web Layout	Control + Command + W
<b>4.2</b> Sharing your Document	Open Sharing Options	Command + Shift + S
<b>4.3</b> Downloading Documents	Save As	Command + Shift + S

## Colophon

From brainstorming to finalizing this guide, it was powered by caffeine and a steady stream of Spotify lo-fi beats. Written on macOS Sonoma 14.5 and printed by Collective Copies in Amherst, Massachusetts—this guide is proof that working smarter, not harder, can save both time and trees.



