TOOLKIT for Making Written Material Clear and Effective

SECTION 3: Methods for testing written material with readers

PART 6

How to collect and use feedback from readers

Chapter 4

Five steps for designing a reader feedback session

U.S. Department of Health and Human Services
Centers for Medicare & Medicaid Services

TOOLKIT Part 6, Chapter 4

Five steps for designing a reader feedback session

List of figures in this chapter:

This document is the fourth of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

Overview of the five steps for designing a session

This chapter is the first in a series of chapters that helps you plan what to say and do during your feedback sessions with readers. In this chapter, we discuss the five steps in the planning process listed below in Figure 6-4-a:

Figure 6-4-a. Five steps for designing a reader feedback session.

How to design a feedback session:

1. Assess the material and decide what you want to learn from readers (these are your "feedback issues").
2. Decide what you will show to readers during the session (all or just part of the material, different versions to compare, etc.).
3. Decide whether to do individual interviews or group sessions.
4. Decide which method to use for each feedback issue or section of the material (the four feedback methods are: ask questions; encourage the reader to "think aloud;" give the reader a task to perform; and observe the reader's behavior).
5. Based on the decisions you have made about feedback issues and methods to use, create a written guide for conducting the session.

Source: Created for this Toolkit.

These basic steps shown in Figure 6-4-a above apply to designing any type of reader feedback session for any purpose. Usually, your purpose will be to test material you are developing or revising, and use what you learn from readers to make improvements. Sometimes you might want to use feedback sessions for other purposes, such as to evaluate materials and choose the most effective ones. But since most sessions are done with the main goal of improving materials, our discussion about designing your feedback sessions emphasizes ways to collect feedback that is the most meaningful and useful for making improvements.

Each feedback project is unique, and you will want to design a session that focuses on your particular needs. This chapter has an overview of the planning process to get you started. Chapters that follow give you the details on how to implement the five steps to design a session that meets your needs.

STEP 1: **Assess the material and decide what you want to learn from readers**

Assess the material and decide what you want to learn from readers (these are your "feedback issues")

- Generate a list of possible feedback issues, using sources such as informal feedback, expert review, results from previous testing, and assessment based on using a checklist of guidelines for writing and design.
- Based on the results of your assessment, consider whether you should make any changes to improve the material before you show it to readers.
- Prioritize the list of feedback issues by deciding which ones are most important to cover in your session.

Create a list of "feedback issues"

To design your feedback session, start by thinking about what you want to accomplish by having readers react to your written material. What are your "feedback issues" – that is, what specific types of things do you want to learn directly from readers?

"Feedback issues" are things you want to focus on when you are getting readers' reactions to your written material.

Feedback issues range from **very broad** ("do readers find this material appealing at first glance?") to **very specific** ("does this explanation make sense to readers?").

You will use your list of feedback issues to structure your sessions with readers. In the next chapter, we cover this first planning step in detail (Toolkit Part 6, Chapter 5, *Creating a list of "feedback issues" to use in testing the material).*

It's helpful to get your entire project team and representatives of your stakeholders actively involved in identifying feedback issues. Writers, graphic designers, subject matter experts, cultural informants, staff from community-based organizations, and others who are involved with the project each have their own areas of interest, experience, and expertise. This means that they will tend to have different kinds of insights about problem areas in the materials.

To generate a list of feedback issues, start by assessing the strengths and weaknesses of the material. Chapter 5 describes approaches you can take, including using the *Toolkit Guidelines for Writing and Design* as an assessment tool to evaluate the material, reviewing informal feedback you have already received, reviewing results from any previous testing, and getting opinions and advice from cultural informants and other expert reviewers.

What if you identify big problems with the material?

When you are working on your list of feedback issues, you will be identifying the strengths and weaknesses of the material. If your assessment of the material reveals any significant problems, it's wise to try to fix them before you show the material to readers. That way, you can use the feedback sessions to check on how well your improvements are working and to fine-tune the rest of the material.

Decide which issues are most important to cover

Once you have a list of possible feedback issues, the next step is to examine the issues and decide which ones are most important to include in your sessions with readers. The next chapter gives tips and examples that show how to prioritize your list.

STEP 2: **Decide what to show readers during the session**

Decide what you will show to readers

- Will you show all or just part of the material?
- Are there different versions you want readers to compare?
- What, if anything, will you need to do to get the written material ready to show to readers?

What will you show to readers?

In Step 2 of planning your session, you decide whether you will show all or just part of the material to readers, and whether you want them to compare different versions. What to show readers during the session depends on many things, including where you are in the process of developing and revising the material, what kinds of feedback you want to get, and how much time you will have.

In most situations, you will probably show the entire document, especially if the material is short. Even if you show the whole thing, you can spend more time on some parts than others. But sometimes you may prefer to show only part of the material during the session. For example:

- You may be at an early stage of development, and would like to get readers' reactions to certain parts before you go any further. Getting feedback on early versions of such things as key messages and ideas for document design can help guide the rest of your work. You can save time and money, too, if you seek feedback while there is still time to make major changes in your approach if needed.

- Your feedback issues may be concentrated in just one part of the document. By showing only part of the material, you can use the time you have available to get in-depth feedback on areas of greatest concern.

At this stage of planning, you'll also want to decide whether to have readers compare different versions of part or all of the material. Whether you use interviews or focus groups, showing different versions to readers can be a great way to get helpful feedback. People enjoy giving their preferences, and they appreciate knowing that you value their opinions. Hearing why they favor some choices and not others can be very informative.

To help you decide whether to show different versions, here are some suggestions:

- Take a look at your list of feedback issues: are there any issues for which it might be helpful to test some alternatives?
- Are there any parts of the material where team members disagree about the approach you should take? If so, consider showing the different options to readers during the session.
- Have you struggled with certain parts of the material and you're not sure how to handle them? Perhaps it would help to show readers some options during your feedback session, and find out what they think.
- Consider showing different choices for photos, illustrations, color schemes, cover designs or other features with a strong visual element. Giving people some examples makes it easier for them to share their views about the visual aspects of your material.

How will you get the material ready to show?

If the material you will be testing is already published, and it's the only thing you plan to show during the session, then there's nothing to get ready. You just need to make sure that you have enough copies available, including a few extra just in case you need them.

If you are still working on draft versions of the material, or you plan to have readers compare different versions, you will need to prepare copies of the material in advance. As much as you can, create copies of the draft versions that closely resemble the finished product. For example, if you are going to ask for feedback on color schemes or pages that rely heavily on color, make sure that the color reproduction is good. Otherwise, the feedback you get could be misleading.

At the same time, don't hesitate to show readers your "work in progress," and don't worry if it looks like a rough draft. Readers are forgiving about draft versions. When you show them material that is clearly still in progress, they know you are serious about listening to their reactions and using them to make improvements.

If you are showing different versions of the material, there are different ways to do it, depending on the material and where the variations occur. For example:

- If variations in design or text appear in many places, it will generally work best to create separate versions of the entire piece. If it's a booklet, for example, you would need to be ready to show the reader a copy of booklet A and a copy of booklet B.

- If variations in design or text are concentrated in just one small area, you can take a different approach, and use an "overlay" to make the comparison. For example, suppose that you have two versions of a paragraph. You could include paragraph A in the booklet you show to readers. You could reproduce paragraph B on a separate sheet of paper and trim the paper down to the size of the paragraph. When you are ready to have the reader compare paragraph B to paragraph A, you can place paragraph B on top of paragraph A. Using version B as an overlay to cover version A makes the comparison concrete and focuses the reader's attention on the specific part that differs.

STEP 3: **Decide whether to do individual interviews or group sessions**

Decide whether to do interviews or group sessions

Individual interviews:

- Provide more privacy and flexibility than group sessions and permit full use of all four methods of getting feedback. (This Toolkit is mainly about using interviews.)
- Work better than groups for assessing navigation, comprehension, doing usability testing, collecting in-depth feedback, getting reactions to material that is long or complex, and getting feedback on topics that might be sensitive or inhibiting to discuss in a group.

Group sessions (such as "focus groups"):

- Are better than interviews in situations where group discussion will enhance the usefulness of the feedback you get.
- Are limited in which methods you can use (in group sessions, you must rely mainly on the method of asking questions).

Either interviews or group sessions can work well for:

- Assessing appeal and cultural appropriateness; getting reactions to content; showing different versions of visuals or document design and asking for preferences.

As you can see from the list above, interviews work better than group sessions for many purposes, and they allow you to use all four of the methods for getting feedback from readers (ask questions, have the reader "think aloud," give the reader a task, and observe the reader's behavior).

Using groups to get feedback from readers is more familiar and popular than using interviews. Groups work well for situations where discussion among readers would make the feedback more informative. If you do groups, you are limited in the methods you can use. Asking questions is the main method for groups, because in a group situation it is hard to have readers "think aloud" or perform tasks that involve using the material.

Whether you should use individual interviews or focus groups is an important decision, and we cover it in depth in Toolkit Part 6, Chapter 6, *Should you do individual interviews or focus groups?*

Toolkit Part 6 focuses mainly on interviews

We have chosen to focus mainly on using interviews rather than group sessions in Toolkit Part 6. By emphasizing interviews and teaching the full range of feedback methods, we hope to encourage greater awareness of the interview approach and provide the help and encouragement you need to try this approach. If you are a beginner, you will find it easier to conduct individual interviews than to manage a group discussion. Also, depending on choices you make about such things as location and recruitment of participants, interviews can be a more efficient and cost-effective approach.

STEP 4: **Decide which methods to use**

Decide which methods to use for each feedback issue or section of the material

There are four methods of getting feedback from readers:

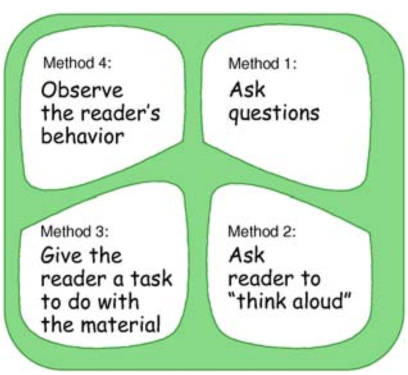
- Ask questions
- Encourage the reader to share thoughts by "thinking aloud"
- Give the reader a task to perform using the material
- Observe the reader's behavior

Which method or combination of methods will work best depends on the type of feedback you are seeking.

If you are doing interviews, you can make full use of all four methods. If you are doing group sessions, you will need to rely mainly on asking questions.

Deciding which methods to use for each feedback issue or section of the material and how you will use them is the *core activity of designing your feedback session*. It's such a big, important topic that we cover it in a series of chapters:

- **Introduction to the four methods**. In the previous chapter, we describe each of the four methods of collecting feedback, shown below:



- **How to choose among the four methods and use them in your sessions**. Toolkit Part 6, Chapter 7, *Which methods work best for which purposes*, will help you match your methods to your feedback issues. Then, for tips on developing the questions you will be asking readers, see Toolkit Part 6, Chapter 8, *Phrasing your questions to get the most useful feedback from readers.*

- **Finally, for help in creating a feedback session that focuses on your specific needs,** see Toolkit Part 6, Chapter 9, *Tips for collecting particular types of feedback from readers.* This chapter covers the main types of feedback you are likely to seek, including checking on appeal, cultural appropriateness, comprehension, ease of navigation, reactions to visuals, and usability.

STEP 5: **Create a written guide for conducting the session**

Create a written guide for conducting the session

This written guide is the final product of your planning. It reflects the decisions you have made about which feedback issues to address and how to address them.

The written guide gives step-by-step instructions for the person who is conducting the session. It tells how to explain the purpose of the session, how to present the material to the readers, and how to ask for their reactions. This written guide includes the "scripted" questions you prepare in advance.

In Steps 1 through 4 of planning your feedback session, you made decisions about what you want to learn from readers and which methods you will use to collect their feedback. Taken together, these decisions constitute the design for your session – that is, your plan for what you will say and do in the session. Now, in Step 5, you put your design into written form by creating a guide for conducting the session.

This guide is a document that gives the interviewer step-by-step instructions about what to say and do during the session. Toolkit Part 6, Chapter 10, *Creating a written guide for conducting feedback sessions*, gives you the details about the written guide and what it covers. Typically, the guide is organized into sections. It starts with an introduction that welcomes the reader and explains what will happen in the session. Then it gives the interviewer instructions about how to present the material to the reader, and how to seek feedback. Typically, the guide includes some “scripted” questions that you have prepared in advance.

Some written guides are very brief, and others are quite detailed; it depends on the material, the number of feedback issues to cover, and the methods you are using. Interviewer preferences are also important. For example, if you have limited experience in conducting feedback sessions, you may be more comfortable using a guide that has detailed instructions.

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