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 8

Phrasing your questions to get the most useful feedback from readers

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

TOOLKIT Part 6, Chapter 8

Phrasing your questions to get the most useful feedback from readers

List of figures in this chapter:

This document is the eighth 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).

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Introduction

In earlier chapters, we introduced *ask questions* as one of four methods of collecting feedback (Chapter 3), and then compared *ask questions* to the three other methods of *think aloud*, *give a task*, and *observe behavior* (Chapter 7).

Of the four methods of getting feedback, asking questions is the one you'll use the most. You will use it often as your main method for getting feedback on a particular topic, and you will use it constantly as a secondary method, using follow-up questions to help clarify an answer or get the reader to say more.

When you ask people questions to get their reactions to written material, you want them to feel comfortable enough to say what's on their mind, including any critical comments they may have. You'd also like to be sure that you don't misinterpret what they've said. And you are hoping that what they say will be specific enough to help you spot problems in the material and perhaps get ideas on ways to fix them. To make this all happen, you need to be careful about how you phrase your questions:

- **This chapter gives you basic guidelines for question wording**. This chapter is your basic reference tool for writing the "scripted" questions you prepare in advance and put into the written guide you use to conduct your feedback sessions. It will help you create clear and effective interview questions that help put people at ease and encourage them to speak up. It will also help you use follow-up questions called "probes" to clarify what a reader has said or encourage the reader to say more.

- **Then the next chapter has many examples of scripted questions that will help you apply the basic guidelines we explain in this chapter** (*Chapter 9, Tips for collecting particular types of feedback from readers*).

Basic guidelines for effective question wording

This section discusses the general guidelines shown below.

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Basic guidelines for question wording

1. Make your questions sound like natural speech.

2. Phrase your questions in a neutral way.

3. Keep your questions friendly and non-intimidating.

4. Be sure that what you are asking is clear.

5. In most situations, ask questions that are open-ended, so that readers can respond in their own way, using their own words.

Basic guideline #1   Make your questions sound like natural speech.

To put people at ease, the interview should sound conversational, like natural speech. Here is an example that shows the difference between conversational language and formal language:

In the example below:
Wordy, formal, impersonal tone, difficult vocabulary

Now I want to ask you about a hypothetical situation. If you were to receive this booklet by mail, how do you think you would utilize it?

In the example below:
Succinct, conversational, friendly tone, simple vocabulary

Now suppose that you got this booklet in the mail. What do you think you would do with it?

As you can see from this example, questions sound more natural when the sentences are reasonably short, and they use everyday words and informal phrasing. To make your questions conversational, try speaking

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them aloud when you are writing them. This will help you choose words and phrases that sound as natural as spoken language. Keeping your questions conversational makes them easier for interviewers to ask, and easier for people to answer.


Basic guideline #2
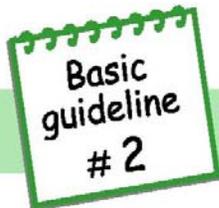
Phrase your questions in a neutral way.

When you write interview questions, take care to avoid wording them in ways that might steer people toward particular answers or points of view. It's natural for some people to feel reticent or somewhat intimidated just by the act of participating in a reader feedback interview. The interview is probably the first one of its type that they have participated in, and they are unsure what to expect. They want to cooperate and provide what you're looking for, so if you give them cues – even subtle cues – about what you would like them to say, they may well give you what you seem to be looking for.

As shown in the example below, framing the questions in a neutral way encourages people to give you a candid response.
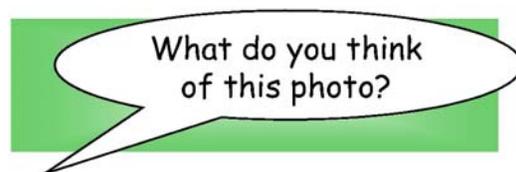
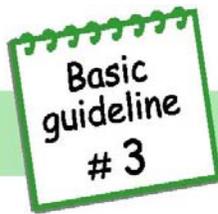Below, the wording is **not neutral**, and it could inhibit a candid response.

This wording implies that, of course people *like* the photo. It's just a question of *how much* they like it.

How much do you like this photo?
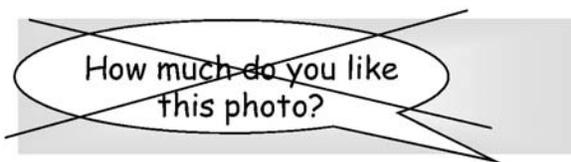
Below, the wording is **neutral**.

This wording does *not* steer people toward any particular type of response.

What do you think of this photo?

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Basic guideline #3: Keep questions friendly and non-intimidating.

Take care to avoid making readers feel as if they're being tested

The question-answer format and inherent artificiality of a feedback session can make some readers feel as if they are being tested. Of course, it's always the material that you are testing – *not the reader* – but we have found that this distinction is easily lost on many readers. In particular, readers with low literacy skills tend to feel vulnerable during feedback sessions. Reassuring them that it's the materials you are testing, not them, may not help. It can even make things worse: You are forced to say the word "testing" aloud when you make this reassurance, and "testing" has negative connotations.

Instead of reassuring people that "it's not a test," show them by your behavior that it's not. Take care to phrase your questions in tactful ways and ask them in a friendly manner:

- Asking questions in a friendly way helps counter any tendency for people to feel as if they are being tested or judged during your feedback session.

- Phrase your questions to be tactful and non-intimidating. For example, take care to soften the wording of direct questions that might otherwise seem too blunt or might put readers on the defensive. As shown in the examples below in Figure 6-8-a, small and subtle changes in wording can help put people at ease and encourage them to speak up – especially if they have something critical to say.

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Figure 6-8-a. Tactful, careful phrasing helps put readers at ease and helps keep feedback sessions from feeling like testing situations.

First example:

Below, the **blunt wording** may seem demanding or intimidating.

It sounds **like a test** where the right answer would be "yes."
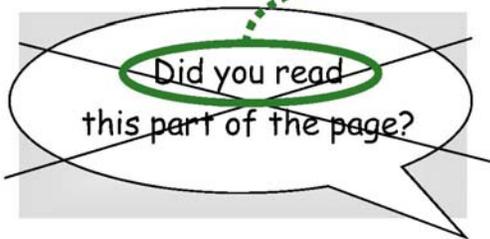
Below, the phrase "did you happen to . . " **softens** the question.

It encourages a candid response by letting people say "no" without losing face.

Did you read this part of the page?

Did you happen to read this part of the page?
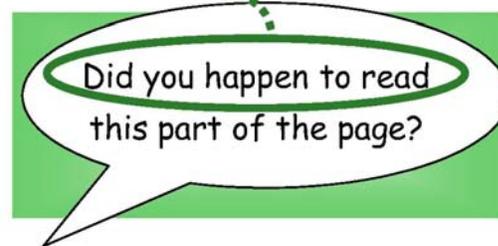
Second example:

Below, the **blunt wording** makes this question sound like a **test of knowledge**. Forcing a participant to say "I don't know" to a question that sounds like a test question can make them feel bad and undermine rapport.
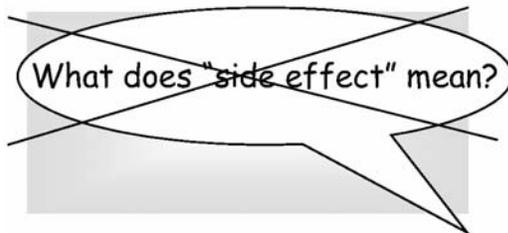
Below, the phrase "what do you think they mean by . . " subtly **shifts the question** from a test of knowledge to a request for insight into the writer's intentions. It **softens** the question and lets people say "I don't know" without losing face.

What does "side effect" mean?

What do you think they mean by "side effect"?

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Figure 6-8-a, continued

Third example:

Below, the word **"we" connects the interviewer personally to the material**, and may inhibit readers who are reluctant to say critical things directly to those who are responsible for producing the material.

Below, the word **"we" has been replaced by "they."**

This wording change is small and subtle, but it can help readers feel more comfortable about criticizing the material.

Is there anything else you think we should put on this page?

Is there anything else you think they should put on this page?
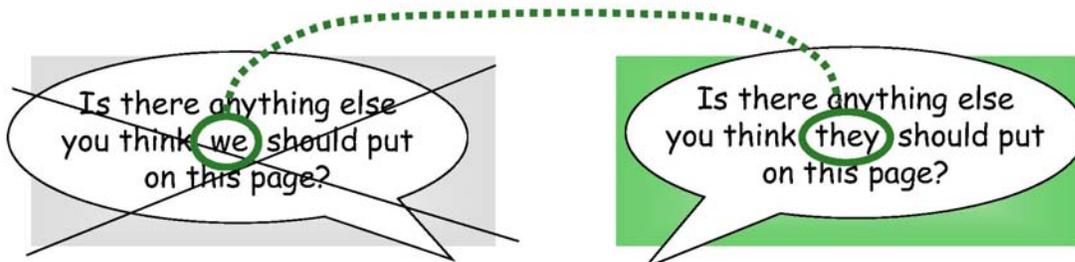
Source: These and the other dialogue examples and commentary in this chapter were created for this Toolkit.

Basic guideline # 4

Be sure that what you're asking is clear.

It can make people uncomfortable if they have to struggle to figure out what a question is trying to ask. As shown below, vague or ambiguous questions put too much burden on the person being interviewed.

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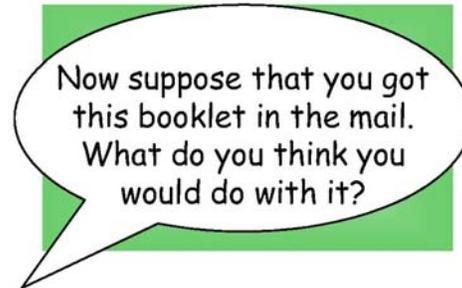In the example below, the question at the end is **vague** and **ambiguous**. Is it asking for a reaction to the booklet, or a reaction to the idea of distributing the booklet by mail?

In the example below, the question wording focuses **clearly** on asking for a reaction to the booklet.

> They are planning to send this booklet in the mail. If they did, how would you react?

> Now suppose that you got this booklet in the mail. What do you think you would do with it?

In the example above on the left side, the question wording is hard to understand. Both phrases of the question --"If they did" and "how would you react?" – are vague, and so is the connection between them. It's up to the person being interviewed to figure out what the question is asking. Here are two possible ways that people might fill in what has been left unsaid in the vague wordings:

- They might interpret the question as asking for an opinion about how the booklet should be distributed: "If they do send the booklet by mail, as they are planning to do, do I think this would be better than getting it to people in some other way?"

- Or they might interpret the question in a more personal way: "If they do as they are planning, and send the booklet by mail, *and they sent one to me,* how do I think I would react to the booklet?"

When people can't figure out what you are asking, rapport suffers and you may not get the feedback you are seeking. Sometimes people will speak up and tell you that your question isn't clear. But often they won't. They may feel inhibited because they can't figure out what the question means. They may simply guess about what you're asking, and base their answer on that guess. If they guess wrong, they will answer a question that's different than the one you thought you had asked – and you may never know it.

Tips for phrasing questions clearly

Here are some ways to help make sure your questions are clearly worded:

- **See if you can spot any ambiguities yourself**. When you finish writing a question, review it carefully. Consider possible ways it could be interpreted – or misinterpreted.

- **Get help from colleagues.** Show the draft questions to people who were not involved in writing them. Ask them to tell you in their own words what they think each question is trying to say.

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▪ **Be ready to change the wording if it proves to be unclear when you start interviewing.**
Ultimately, the best way to spot problems with your interview questions is to do a pretest with the same type of participants you will be interviewing, but this may not be practical. Instead, you can stay alert to possible ambiguities of question wording, especially during your first few interviews. If you spot any, then reword your questions to make them clear.

▪ **Use your Session Summary Form to identify problem questions** (see Toolkit Part 6, Chapter 11, *Creating a "Session Summary Form"*). A Session Summary Form is a form that interviewers fill out immediately after the interview. It has places to record highlights from that interview and note problems that came up during the interview. The sample form in Chapter 11 includes a place to write down any questions that didn't work well during the interview, so that interviewers can consider whether to make changes to these questions.
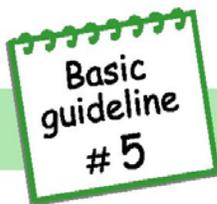
Basic guideline #5

In most situations, ask questions that are **open-ended** so that readers can respond in their own way, using their own words.

Question wordings can either be open-ended or closed-ended. As shown below, questions that leave it "open" for people to give an answer in their own way are called "open-ended" questions. Questions that come with a pre-determined set of answer choices are called "closed ended" or "fixed choice" questions.

"open-ended" questions

- Do **not** have "ready made" answers to choose from, such as "yes" or "no."

- Instead, they are phrased in a broad and "open" way that encourages people to answer in their own words (such as, "tell me what you're thinking").

- When people answer in their own words, rather than choosing from a set of answers, they tend to give responses that are more specific. When answers are more specific, it's easier to spot possible problems in the material and think about ways to fix them.

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"closed ended" or "fixed choice"

- "Closed-ended" questions come with "ready made" answers to choose from. They are sometimes called "fixed choice" questions.

- Examples are questions that can be answered "yes" or "no," and questions that come with rating scales such as "poor" to "excellent."

- Although closed-ended questions are very useful for some purposes, they do not encourage people to answer in their own words. Instead, they encourage people to use the "fixed choices" to respond, such as saying "yes" or "no." This type of answer doesn't tell you much about reactions to the material unless you follow up with other questions (such as asking, "Why do you say 'no'?").

Open-ended questions tend to work better in most situations

The distinction between open-ended and closed-ended questions is important, because open-ended questions tend to work much better than closed-ended questions for getting most types of readers' reactions to written material. In general, using an open-ended question will give you greater insight into how well the material is working. There are two main reasons why:

1. **Open-ended questions typically trigger more *wide-ranging* responses that reflect the participants' unique perspectives.**

   - **By leaving it up to interviewees to answer as they see fit, open-ended questions get people to reveal their own frame of reference**. Giving people free rein to answer as they wish can lead to surprises and fascinating insights that help you spot problems in written materials and give you clues about ways to fix them.

   - **In contrast, the answer choices you provide in a closed-ended question impose a particular frame of reference, and therefore tend to channel and constrain the responses you get.** For example, if you ask people a closed-ended yes/no question about whether the information in a booklet is useful to them, you are asking them to react to the booklet in terms of personal usefulness. In contrast, if you ask them an open-ended question such as "*what do you think about the information in this booklet*," they might respond in any number of ways – only one of which is in terms of personal usefulness.

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2. **Open-ended questions encourage responses that tend to be** *longer and more detailed*.

▪ **When you let people answer in their own way, using their own words, you reinforce your interest in hearing whatever they are thinking**. The free form of an open-ended question often triggers answers that are more expansive and therefore much more useful in spotting problems in the written materials and figuring out ways to fix them.

▪ **In contrast, giving people a fixed set of choices encourages them to give a short and unelaborated answer** (although, as we discuss later on, you could use follow-up questions to get them to say more).

The dialogues in the example below illustrate how open-ended questioning can be more productive:

Using a **closed-ended** question: Using an **open-ended** question:

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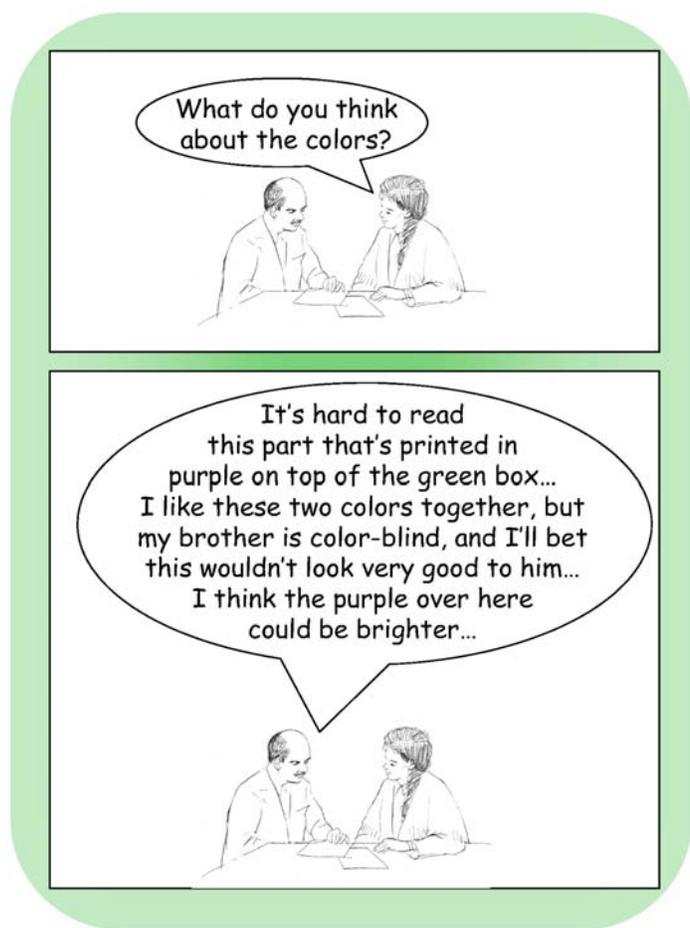
Open-ended questions are good for many purposes. For example, they are ideal for getting people to share their perceptions. To check on comprehension, you can use them to get people to tell what the material is about by using their own words. Here are some examples:
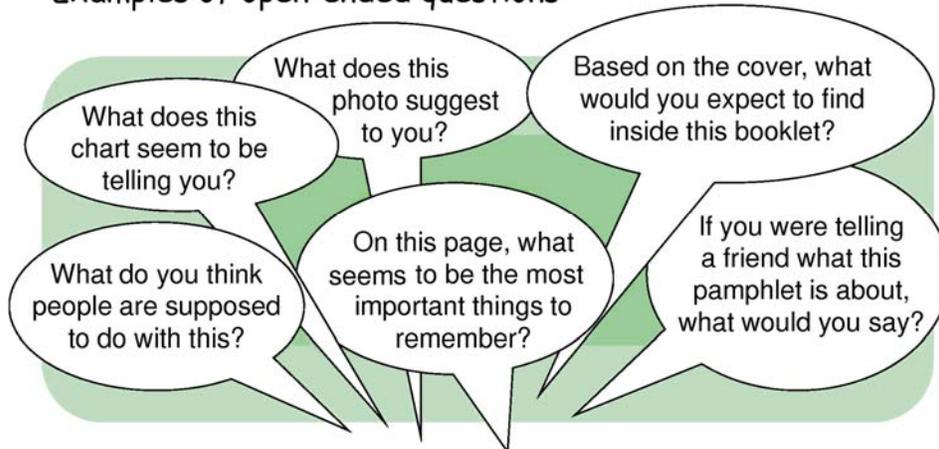
Examples of open-ended questions

What does this chart seem to be telling you?

What does this photo suggest to you?

Based on the cover, what would you expect to find inside this booklet?

What do you think people are supposed to do with this?

On this page, what seems to be the most important things to remember?

If you were telling a friend what this pamphlet is about, what would you say?

Closed-ended questions can also work well

Although open-ended questions tend to work better for most feedback purposes, there's nothing wrong with using an occasional closed-ended question in your interviews. Sometimes, a closed-ended question can work quite well, especially when you use follow-up to get a more complete answer. Here's an example:

Start with a closed-ended question

Do you find this definition helpful or not?

And then follow up on the answer you get, using open-ended probes:

What do you find helpful about it?

What makes you say it's not very helpful?

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Interview questions can be "scripted" or "unscripted"

During a feedback session, interviewers refer to a written guide that tells them how to conduct the interview (see Toolkit Part 6, Chapter 10, *Creating a written guide for conducting feedback sessions*). The written guide has step-by-step instructions for how to show the material to readers and ask for their feedback. Often, it includes a series of questions that you prepare in advance. As shown below, this Toolkit uses the term "scripted" for these questions that are spelled out in advance, much like a script. It uses the term "unscripted" for the questions the interviewer asks spontaneously, to meet a particular need that arises during the interview.

"scripted" questions (prepared in advance)

- "Scripted" questions are the questions you prepare in advance and put into the written guide you will use to conduct the session.

- Preparing questions in advance helps you structure the feedback session. It also lets you plan the most effective ways to phrase key questions.

- Sometimes you will ask your scripted questions exactly as they are written in the guide, much like using a "script." Other times you might use the scripted questions for reference, and adapt the wording as needed to fit the situation.

"unscripted" questions (improvised as needed)

- "Unscripted" or "spontaneous" questions are the ones you improvise while you are conducting the feedback session.

- You can't anticipate everything, so you create your own (unscripted) questions in response to what comes up. You can use unscripted questions to cover new topics that arise and to follow up on what readers say in response to a scripted question.

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Here are some things to know about scripted and unscripted questions:

- **Interviews are a mix of scripted and unscripted questions, but the nature of the mix can vary considerably.** Some written guides are brief and mostly unstructured, with very few scripted questions. Other written guides are detailed and highly structured, and may include exact wordings for many or most of the questions to be asked.

- **Scripted questions provide structure for the interview, and specifying exact wordings in advance helps maintain quality and consistency across interviews**. Scripting in advance provides good guidance for interviewers, and often they will ask the scripted questions exactly as they are written. Sometimes, though, interviewers need the flexibility to adapt the wording of a scripted question to fit the circumstances of an interview.

- Whatever the mix of scripted and unscripted questions, **unscripted questions are always a crucial part of any interview**. Interviews evolve in ways that cannot be predicted, so interviewers need to be ready to adapt and improvise questions to fit with what the interviewee has just said.

- **Some scripted questions apply only to certain respondents, or only under certain conditions**. This means that you might not ask all of the scripted questions in every interview.

- For example, interviewers are supposed to skip scripted questions if the participant has already answered the question during think aloud or as part of their answer to a different question. If you don't skip the scripted question in this situation, the participant will think you have not been listening, and this will damage rapport.

- Some scripted questions are marked as discretionary, such as scripted questions that give alternate wordings an interviewer can try if the first wording doesn't work well.

Questions can be "regular questions" or follow-up questions called "probes"

When you work on designing a feedback session and preparing a written guide, you'll notice that questions are used in different ways for different purposes. Here are some terms that categorize questions according to the function they perform within an interview:

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- **"Regular" or "main" questions are the basic questions that you ask** (as distinct from any follow-up questions that you might ask immediately after the regular question to try to get people to say more). "Regular questions" is just a convenient way to refer to the substantive questions that are the focus of your interview.

- **Follow-up questions, or "probes," are questions that press for clarification or for a more detailed or complete answer.** You use them to "follow up" on something the person has just said, to try to get him or her to say more. Researchers usually call these "probes," because they probe for an additional answer or a more elaborated answer. As we explain below, these include "**generic probes**" that are phrased in a general way (*Can you tell me more about that?*) and "**tailored probes**" with phrasing that is more specific (*Can you show me which parts are confusing?*).

Some questions need a "lead-in"

Sometimes you need to give feedback session participants some context or background before you ask a question. "Lead-ins" are statements that serve as a preface to an actual question. They are called "lead-ins" because they provide an introduction or set up a context that "leads into" a question that follows. For example:

- **A lead-in can provide a transition to a new topic**, such as, *Now let's talk about the table of contents*.

- **You can use a lead-in to provide background information or explanations that people may need in order to answer the question that comes next**. For example, a lead-in could explain that the written material is not in final format, or tell how it will be distributed (*People with arthritis will get a copy of this pamphlet at their doctor's office*).

Using probes to follow-up and get more informative feedback

Follow-up questions are a powerful tool for getting people's reactions in a feedback session. When the people you are interviewing give a very brief or ambiguous answer to a question you ask, you can follow up with a probe to try to get a more useful, meaningful response. Often, it's the answers to the follow-ups that reveal the most about how people are interpreting and reacting to the written material.

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"probes"
(follow-up questions)

"Probes" are follow-up questions that can be scripted or spontaneous.
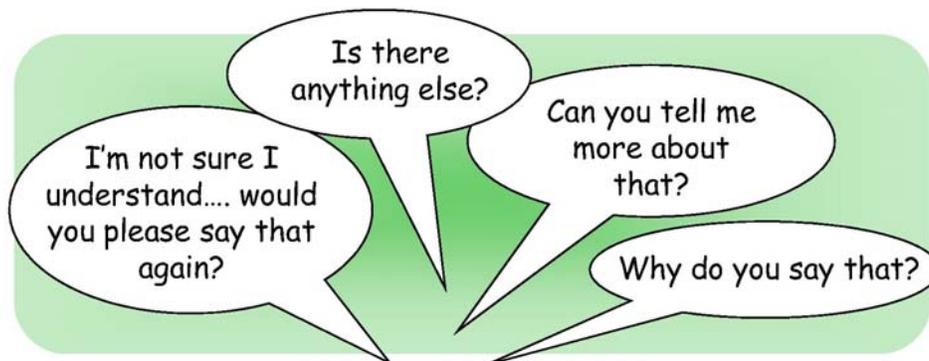You can use probes for different purposes:

■ Usually, the purpose is to get the reader to say more. Examples of
neutrally worded, open-ended probes are *"tell me more about that"*
and *"what makes you say that?"*

■ You can also use probes to clarify what a reader has said. For
example, you could ask, "*When you say the advice is 'unrealistic,'
what do you mean by 'unrealistic?'*".

Probes are a crucial tool for getting the most meaningful and informative
feedback. They help you get answers that are more specific, and
therefore more useful for spotting problems and making improvements
in the material. They also help keep you from misinterpreting what a
reader has said.
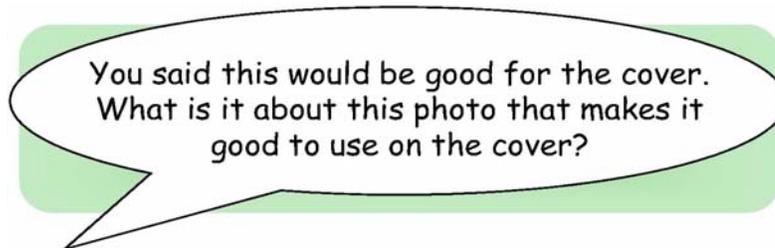
Probes can be "generic" or "tailored"

There are two main types of probes:

▪ "**Generic probes**" are follow-ups with wording that is neutral and general enough ("generic") to
fit many situations where a probe is needed. Here are some examples:

Is there
anything else?

Can you tell me
more about
that?

I'm not sure I
understand…. would
you please say that
again?

Why do you say that?

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▪   "**Tailored probes**" (or "custom probes") are follow-up questions that are custom worded to suit a specific situation. Here is an example of a tailored or custom probe:

You said this would be good for the cover.
What is it about this photo that makes it
good to use on the cover?

Using probes to make your feedback sessions more productive

Skillful use of follow-ups is one of the hallmarks of an effective interviewer. Written interview guides often include reminders to "probe for specifics," and sometimes they include suggested wording for tailored or generic probes.

The written interview guide may give some guidance, but it's generally up to the interviewer to decide when and how to use a follow-up question. Here are some tips:

▪   **When participants give an ambiguous answer, it's important to probe for clarity**. Otherwise, you may misinterpret what they say.

▪   **When participants give very brief answers, probing can help you get responses that are more meaningful and useful.**

▪   **When you ask a closed-ended question, you can use an open-ended** *follow-up question* **to get a more informative response**. For example, suppose that you show two photos as possible choices for the cover of a pamphlet. You ask, *Do you like one of these better than the other, or do you like them both the same?* The participant points to the photo she prefers. You could stop right there, because you know which photo she prefers. But you haven't learned anything about *why* she likes that one better. You will get more useful feedback if you probe, such as asking *and what is it you like better about that one?*

▪   **You can use follow-up questions to check on the meaning of things you observe**. For example, you could say, *I noticed that you frowned when you read that paragraph. Can you tell me about that?*

▪   **Keep in mind that there's a fine line between encouraging people to talk but not badgering them**. When things are working well, asking follow-up questions lets people know that you are interested in the details. It helps encourage them to give a more specific answer to your next

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question, which in turn reduces the need for further probing. But this does not work with all participants. You will need to use your judgment about when and how often to probe. If you probe too much, you will make readers self-conscious, and you may begin to annoy them.

Sample questions in a written interview guide

We have covered a number of different ways to categorize the types of questions you use in a reader feedback session: open-ended vs. closed-ended, scripted vs. unscripted, lead-in vs. main question vs. follow-up or probe, generic vs. tailored probe. Any given question you use could fall into several of these categories. For example, a question could be an *unscripted open-ended follow-up*, a *scripted closed-ended main question*, or an *unscripted tailored probe*. Many combinations are possible. To help you visualize how it works when you put various types of questions together, Figure 6-8-b below gives an example.

Figure   6-8-b. Excerpt from an interview guide that illustrates different types of questions.

Here is an excerpt from a written interview guide. We start by showing it to you without any explanatory notes. See if you can identify what types of questions it includes. Then look below where we repeat this excerpt from an interview guide and add comments that explain each type of question.

sample script from an interview guide

5. Now I'd like your opinion about the amount of information in this section of the booklet.

   Do you think the amount of information it gives is too much, too little, or about right?

   ☐ *Too much* → *Probes:* Which information do you think should be dropped or left out?

   Which parts tell you too much, or give you more than you really need to know?

   (Probe for a specific answer)

   ☐ *Too little* → *Probes:* What information should be added to make this section better?

   Which parts don't tell you enough?

   (Probe for a specific answer)

   ☐ *About right*

   ☐ *No opinion or no answer*

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Figure 6-8-b continued.

Commentary

Lead-in

5. Now I'd like your opinion about the amount of information in this section of the booklet.

Do you think the amount of information it gives is too much, too little, or about right?

Main question, scripted, closed-ended

This question is worded in a neutral way: the fixed-choice responses cover the full range from "too much" to "too little")

☐ *Too much* → *Probes:* Which information do you think should be dropped or left out?

Which parts tell you too much, or give you more than you really need to know?

(Probe for a specific answer)

☐ *Too little* →

Unscripted probes

These are just reminders to the interviewer to use follow-up questions to encourage a more specific answer. The interviewer decides whether to use generic or tailored probes, and is careful not to annoy the person by probing too much or too often.

Probes: What information should be added to make this section better?

Which parts don't tell you enough?

(Probe for a specific answer)

☐ *About right*

☐ *No opinion or no answer*

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Figure 6-8-b continued.

Commentary, *continued*

5. Now I'd like your opinion about the amount of information in this section of the booklet.

Do you think the amount of information it gives is too much, too little, or about right?

Tailored (custom) probes, scripted, open-ended

Wording differs depending on whether the answer is "too much" or "too little."

Also, for each answer, there are alternate wordings. The interviewer can choose among them, or use more than one.

☐ *Too much* → *Probes:* Which information do you think should be dropped or left out?
Which parts tell you too much, or give you more than you really need to know?
Probe for a specific answer)

☐ *Too little* → *Probes:* What information should be added to make this section better?
Which parts don't tell you enough?
Probe for a specific answer)

☐ *About right*

☐ *No opinion or no answer*

Source: Created for this Toolkit.

End notes

For further discussion and good examples of question wording, see *A Practical Guide to Usability Testing*, especially Table 19-1 on pages 299-300 ("Neutral questions to ask, biased questions to avoid, and why the neutral questions are preferable"). This book is by Joseph S. Dumas and Janice C. Redish. Revised edition, 1999, Portland, OR: Intellect Books.

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