

# A Forms Perspective

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## “We don’t use forms in our company!”

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### A strange state of affairs

On numerous occasions over the past few years our company has needed to phone organisations to find out whom we should talk to about forms. Many times, when asking to speak to the person responsible for forms, the reply has been along the lines: "we don't use forms in our company!". In one Australian study some years ago, most of the top 100 companies in the country were approached with a similar question and in over 90% of cases the receptionist either gave a similar answer to the above or didn't know who was responsible.

What is the cause of this strange state of affairs? Do these people really believe that they don't use forms? What does the answer mean anyway?

Ever since printed forms were introduced to the Western world by Gutenberg in 1454, they've been regarded as simple documents that virtually anyone can produce, and that idea hasn't changed, so it's no wonder that we get the responses we do. People, from management to the newest operative, just don't take forms seriously. Every forms analyst can tell you about the strange responses they get when asked what sort of work they do. Tell people you "design forms" and you normally get a puzzled look and a question like, "you mean to say someone actually DESIGNS forms?". I've often said that because we learn drawing in kindergarten, and since people consider forms to be just drawing lines, boxes and words, then form design is considered to be kid stuff. It isn't!

### The real problem

Because we treat forms so lightly, business and government is faced with enormous problems that remain untouched. Repeated studies have shown that between 80% and 100% of filled out forms have one or more errors. The cost of correcting those errors is astronomical. In one study in Australia, we found close to 100% of a government application form wrongly filled out and needing to be returned to applicants. There were over 500,000 applications each year. Even using conservative estimates to correct the errors and process the paperwork as well as basing costs on wages only (without all the normal add-ons), we estimated that it was costing this department over 2 million dollars per year just to correct errors on that one form. Remember that this is not just an isolated case. It occurs in most organisations and with the vast majority of forms. Consider large government departments and organisations such as banks with thousands of forms—the cost becomes almost too large to imagine.

## **Where this leads**

This sad state of affairs means that in most organisations, NO ONE is responsible for even basic form design, let alone responsibility for content and language. In many organisations every employee becomes an amateur 'form designer'. Even worse, forms are often left in the hands of people who are often highly skilled in their particular field, but have little or no training in human communication. Typical of these groups of people are graphic designers, advertising agencies, computer programmers and printing companies. Many of these people are extremely competent in their relevant professions, but graphic design, advertising, IT and printing skills are not necessarily compatible with human communication skills. Human communication should be taught in universities and colleges to all these people, but unfortunately, what is often taught is nothing more than subjective opinions instead of knowledge based on research and empirical evidence.

It seems that as long as the form looks 'pretty' or follows arbitrary 'rules' of 'plain language' or 'graphic design', the owners of the forms are happy with the result. Then we end up blaming the form fillers for errors and claiming that they are functionally illiterate. I've said many times that it isn't the users who are functionally illiterate, but the form designers who don't know how to design forms to fulfil their function.

Management worries about the cost of printing and distributing forms and this is often the prime motivator for doing something about them. But this is only a tiny proportion of the total cost. My experience in testing forms over the past 15 years has been that the greatest cost is actually that of dealing with the errors people make. This often goes way beyond just the routine processing cost.

Right now we're seeing an increasing interest in electronic forms with many organisations wanting to place all their forms on the Internet or intranet to eliminate printing, storage and similar costs. Trying to reduce costs is certainly praiseworthy, but I wonder what managers would say if they knew where the REAL cost savings lie. I'll have more to say about this in a future Forms Perspective, but for now I'll just comment that putting bad forms on the Internet is not the solution to improving productivity and reducing errors. Management must wake up to where the greatest cost savings lie and not just rely on technology. Part of that is to keep forms in the hands of forms specialists. The Internet is another of the real problems facing organisations where many people with web experience think they know all about communicating. One only has to look at the vast majority of web site that take ages to navigate (or even find relevant information) to realise how few web page designers really understand human communication.

## **So what can we do about it?**

The first step is to employ people who know about human communication as well as forms analysis and design. There's a great move all around the world right now for outsourcing the forms function, but I still believe that it should be in-house in most organisations, especially the large ones. This may sound strange coming from a consultant who earns his living from other people's forms problems, but to give sound advice, I believe I need to be honest.

The second step is to get all the organisation's forms under control and that is no small task. Nevertheless it CAN be done. I've had the privilege of implementing forms management programs in a number of large organisations, both government and private enterprise, and while it takes time, the processes are straightforward. My book *Managing Business Forms* shows how to do it and we have some other free papers on our web site under the Free Literature heading.

**In conclusion:**

There is no excuse for any organisation to have problems with its forms. Once management realises the enormous cost of bad forms, the solution is up to them.

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