

A Forms Perspective

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An open letter to employers

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This paper is based on an article that was originally written for Modern Office in 1981.

Dear Employer,

When your employees use your forms what goes through their minds?

- Do they think you're a good organisation to work for or do your forms give the impression that your organisation is a 'backyard joint'?
- Do they see you as a professional manager?
- Do they become hostile towards your business?
- Do the forms give the impression that you respect the staff?
- Do they desire to work harder, or do the forms give them the impression that they are unimportant?
- Do they understand what they have to do with the forms?

"Now what", you may say, "has all this to do with forms? Surely forms are only cheap bits of paper with blank spaces for people to fill in information? That's just the point! If you regard them as 'cheap bits of paper', then that's the way your employees will treat them...CHEAPLY!

Many organisations spend a lot of money getting *public-use* forms designed by graphic designers so that they can impress their customers. In some cases they may even have them designed by professional forms analysts. But what about *internal* forms? Why are they so frequently ignored? In 1930 United States statistics showed that for every person working in a clerical job there were thirty plant or production workers. By 1950 this had increased to one clerk for every 2.5 production workers. In Australia in 1981 the ratio was one clerk to every 2.05 trades/production workers. By 2002 the ratio was one clerk to every 1.02 trades/production workers. That's approximately 50% of the workforce doing primarily clerical work—and their major tools of trade are the forms you give them.

What would happen if you gave your carpenters saws with teeth missing, or your electricians drills with worn-out motors, or your desktop publishing staff computer mice with buttons that don't work, or your accountants calculators that give wrong answers? The answer should be obvious: TROUBLE—DISCONTENT—MAYBE EVEN STRIKES.

We don't expect our tradespeople to work without proper tools so why treat our clerks differently? We spend large sums on computers to supposedly improve productivity yet completely negate the benefits in many cases by feeding these great machines with garbage from our incompetent, unprofessional and often 'antique' forms. A few years back I came across a company inputting data to its computer system with forms that were designed for an out-of-date manual system and they were wondering why there was a rejection rate of 25%. The data entry operators were querying one in four input forms. You can image what affect this was having on the relationships between the data entry operators and those responsible for the content.

The first thing that strikes many form users is appearance. That initial mental impression will have a big impact on what they do with it. A pleasant looking, professional form gives a feeling of importance. I've come across many managers who've said, "it's only internal", as if their employees don't really matter, and then wonder why some employees copy the same attitude—"it's ONLY internal"—as if the work itself didn't really matter. Treat your employees like dirt and they'll often treat your business the same way. We use fancy letterheads and large organisations might even spend a million dollars or more for a graphics expert to design logos and corporate image, and then balk at spending a few dollars on forms.

Some years back, I conducted a form design course for a leading financial institution and my initial reaction on entering their building was one of respect. The foyer was beautifully furnished with a magnificent gold emblem over the entrance. The office area was tastefully decorated with pot plants, original oil paintings on the walls, solid teak desks, other attractive furniture and highly polished metal fittings. They gave the impression of a solid, financially stable and very dignified institution. Then I had a look at their forms. All I could say was "yuk"! The forms were photocopies of photocopies (of photocopies, etc.) of forms originally prepared on a typewriter. Now to give them credit, they were doing something about it and they did have what they considered genuine reasons for their approach. But while they had surrounded their employees with the trappings of wealth and importance, these same employees spent much of their working day, not looking at the paintings and pot plants, but at the forms. One was laughing at the other.

The second major problem is usually the design of the content. This is where user frustration sets in. Designers leave insufficient space for some items and too much for others. They use words in questions, captions and instructions that form fillers don't understand. Management complains that people don't fill in the forms properly, yet the forms aren't laid out in a way that makes it clear what users have to do. I see many forms where the type is too small or difficult to read, and in many cases cluttered with unnecessary printing. Far too often, the forms ask for too much information—information that employees know is never used.

The moral of this sad tale of woe is that form design should not be left to amateurs. Although a person can learn the basics of form design in a year or two, I found from many years experience that it takes at least five years to thoroughly train a good all-round forms analyst. It's a specialised field and organisations need specialist help. It's common practice for organisations to outsource their form design work to a printing company, graphic design firm or perhaps an advertising agency or public relations company. However, just because someone knows how to print forms, create advertising or design graphics, it doesn't follow that they understand forms, which are an entirely different subject. Form design falls into a specialised component of what is often referred to as 'Information Design'. Equally dangerous areas to leave your form design to are the computer department or those responsible for web development. Given the extensive use of the Internet and the increasing use of electronic forms for both internal and public use, there is a big tendency for these areas to take over the form design function. My experience has been that the programmer or web developer who knows how to design effective forms is very rare indeed. In most organisations, such people just don't exist. The IT and web people may need to be involved as part of the team, but rarely as the forms designers.

Finally, let me offer you a challenge. Find out who designs your forms and how much experience they've had. Then take a walk around your office and collect as many forms as you can. See how you go filling some of them in—or even better, conduct an error analysis. Since this paper was originally written for Modern Office, we've learned a great deal about how people use forms. Extensive research over the past 20 years has shown that between 80% and 100% of most public-use forms contain errors in the data, generally because of poor form design. An error analysis is a means of examining filled out forms to see where the errors are. If you've never done such a study, you'll probably be in for a big shock.

Additional reading

We have a separate publication listing books and articles on forms and related subjects.

For further information

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