

Designing Forms for People

3-day Course

Purpose

This 3-day course is a concentrated practical introduction to forms analysis and design. In addition to basic forms subjects such as layout, colour and typography, it emphasises reducing user error in public-use forms and questionnaires. All participants receive hands-on training in observational useability testing.

No previous forms experience is necessary—it is not necessary to be a forms analyst or designer to attend this course. It will also be of great benefit to managers and especially those responsible for the development of corporate policy and government programs. It will show you how to make sure that forms associated with those programs actually work. This especially applies if the end users are the general public.

Trainer

The course will be conducted by Rob Barnett who has had over 40 years experience in business systems analysis and form design. In 1998 he became the first person outside North America to receive the prestigious Jo Warner Award from the Business Forms Management Association for his contribution to the forms profession.

What you receive

All participants receive summary notes and a copy of our 500 page textbook, Forms For People. Lunch and refreshments are supplied each day.

Cost

\$2,040 per person. 10% discount applies if 2 or more people from the same organisation attend the same course session.

Communication and language

Designing successful forms

- The need for better quality forms
- Overview of modern forms research
- Where organisations fail in forms quality
- Problems people have with forms

Communication and psychology

- What is 'communication'?
- Forms as a means of dialogue
- Empathy for the form user
- Forms versus other written communication
- Psychology and other human issues

Forms language

- Forms language versus prose
- Forms grammar
- The 'Plain Language' trap
- Words and meaning

Questionnaire design

- David Frohlich's 7 question principles
- Decision questions and routing
- Problems with 'yes' / 'no' answers
- Making choices

Getting people to follow instructions

- Why instructions fail
- Different types of instructions

Analysis and design

Basic principles of forms analysis

- The process
- Origin of data
- How people use the form
- Retention, storage and distribution

Colour in forms

- Practical uses
- Specifying colour
- Colour matching
- Shading

Typography for forms

- Major considerations
- Choosing the right type for forms

Basic form graphics

- Lines boxes and ballot boxes
- Answer spaces and captions
- Checklists and declarations

Question styles and their usage

- Form letters
- Table and matrix
- 'Closed' versus 'open' questions
- Questionnaires

Errors and useability

Types of errors people make

- The high cost of errors
- Causes and types of errors
- Analysing errors

Traditional testing methods

- Where they often fail
- Readability formulas—why they are inappropriate for forms work
- Charting paper flow
- Logic charts for questionnaire development
- Process charting and workflow
- Opinion surveys and focus groups

Modern useability testing

- The need
- Observational study methodology
- Testing reporting forms
- Testing electronic forms
- **Hands-on practical testing exercises for all participants**