

Language of Business Forms Course

Purpose

This 3-day course 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.

We believe this is the most important course we conduct. 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 38 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 all course materials. Lunch and refreshments are supplied each day.

Communication and language

Designing successful forms

- The need for better quality forms
- Overview of modern forms research
- What we mean by 'quality forms'
- Where organisations fail in forms quality
- Problems people have with forms
- Origin of many form design problems
- Who is responsible for forms quality?

Human communication

- What is 'information'?
- What is 'communication'?
- Forms as a means of dialogue
- Empathy for the form user
- Forms versus other written communication
- Literacy and readability

Forms language

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

Useability testing

Types of errors people make

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

Data gathering

- Sources of information
- Written surveys
- Interviewing
- Discussion groups

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
- Large scale pilot studies
- Opinion surveys and focus groups

Useability testing

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

Asking questions on forms

Question styles and their usage

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

Getting people to follow instructions

- Why instructions fail
- Instruction at the start
- Question explanations
- What to do when the form is finished

Forms for aged people

- Major issues—results of recent research
- Practical advice

Questionnaire design

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