

WRITING, CLEAR AND SIMPLE

DOCUMENT TESTING: THE MISSING STEP

BY ROY JACOBSEN



You can't be confident a document will meet its goals unless you take one final step: testing.

You know what a document needs to do. You've analyzed the audience demographics and anticipated the needs of various types of likely readers. Or you've created a profile of the typical targeted reader. Whether the goal is to educate, inform, motivate, entertain, influence thinking, inspire a specific response, or a combination of these, the intended takeaway is clear.

So you map out the resources, gather data, interview subject matter experts, and review the appropriate journals and other reference works. You create an outline, then write several drafts. You choose your words carefully, then proofread the final draft yourself before it is reviewed and revised to adhere to your in-house style guide and receives the approval of the powers that be, perhaps including the legal department.

In sum, you do everything you know how to do so this document—it may be a letter, brochure, pamphlet, or manual—meets all requirements for attaining the goal that you or your organization set for it, and serves its external audience well.

But you can't be confident a document will fulfill these expectations unless you take one final step: testing.

WHY TESTING?

The primary goal of document testing is pretty clear—make sure the document achieves its main goals— but there are a number of ancillary benefits as well:

- Reduce customer service calls: By testing your document's effectiveness, and then modifying it based on that testing, you reduce the likelihood that customers will have to call to ask questions.
- Increase audience/customer satisfaction: If your document clearly communicates its message to the audience, they're likely to have a better impression of your organization than they would have if it left them puzzled.
- Prevent costly rewriting and reprinting. It's far better to discover fundamental flaws in your document before you go to the time and expense of printing and distributing it.

DOCUMENT TESTING METHODS

You can use several different methods to test a document; the one you choose will depend on the type of data you want to gather (qualitative or quantitative), the type of document you're producing, and your publishing context.

- Protocol testing
- Focus groups
- Usability testing
- Control studies

The first three methods are qualitative and will help you observe and gather reader reactions; the fourth is quantitative and will produce data about the accessibility of a document.

Whichever method you choose, tie the test design to the document's goal.

For example, if it's an educational, informative document, you'll test for how well readers understand the information. If you want your readers to take some action in response to the document, you're testing for the correct specific response.

Protocol testing is one of the easiest and least expensive qualitative testing methods. It involves one-on-one interviews with readers from your target audience and helps show whether they really understand what the document is supposed to tell them. In a protocol test, after reading a portion of the text—usually a few

sentences—a reader is asked by an interviewer to explain what that portion means. After allowing a reader to finish the document, the interviewer can ask broader questions, can be asked such as “What do you think is the main point of this document?” “What would you do after reading this document?”

Protocol testing has been widely used in plain-language initiatives to test readability.

It can reveal confusing word choices, missing information, or ambiguous instructions. For example, while testing some of its form letters in 2006, the U.S. Veterans Benefits Administration discovered that different readers gave strikingly different definitions for terms like *gainfully employed* and *service-connected disability*. More important, the readers’ definitions frequently did not match the VBA’s.

You don’t need to conduct a large number of these interviews to get useful feedback on a document. Six to nine participants is a good group, although you can benefit by interviewing as few as three readers, according to the plainlanguage.gov testing guidelines and usability guru Jakob Nielsen (useit.com).

If your document is intended to influence readers, a focus group can help you gauge its effectiveness.

Focus groups also gather qualitative information, primarily about how people feel about a document. A moderator works with a small group—usually 8 to 12 people—selected from the target audience. Ideally, the moderator will be neutral—someone not involved in creating the document.

The moderator will prepare a number of questions about the document under review and guide the group through a discussion of their answers. The questions should not be leading or potentially biased toward a particular response.

If your document is intended to influence readers, a focus group can help you gauge its effectiveness. However, for identifying usability problems and measuring readers' understanding of the content, a focus group is not the best method.

Usability testing involves watching how a reader attempts to use a document and follow instructions. This qualitative approach is well suited to instructional documents.

For example, you might watch someone try to fill out a form or assemble a product using the instructions you provided. As reference points, you can give them a series of questions that you believe they

should be able to answer using the document—an open-book test, more or less.

Do the users make any mistakes? Do they have to turn to other pages or other references for more information? Do they become lost or frustrated?

Asking readers to “think out loud” during usability testing can give you insights into the way they process the information in the document, the workarounds they attempt, and their ultimate reaction to problems they encounter.

If you’re using any of these qualitative tests on large documents, it might be impractical to test the entire document. In that case, you’ll have to select sections that are representative of the whole, and apply what you learn from these parts to the whole.

Control studies provide quantitative data about how well a document serves the goal set for it. In a control study, two versions of a document—a control (an original version) and a test version that has been revised in some way—are distributed to test groups.

The respective groups' responses are measured and can be compared to see which version was more effective.

For example, you can test which version of a brochure results in greater enrollment in a program, or leads to fewer recipients calling a help line with questions. Direct marketers use control studies to test which sales letter is most effective with prospects.

A new tool from Google even makes it possible to test website content. The Google Website Optimizer is a free service you can use to test different versions of a web page—with different copy, different headlines, different graphics. After you've set up the page versions you want to test, Website Optimizer displays these different versions to different visitors.

It then tracks how frequently they perform your “target action”—which which may be clicking a link for more information, signing up for a newsletter, or clicking the “Order” button—and analyzes the results for you, letting you know which version of the web page was most effective.

Control testing can tell you not only which document is more effective but also how much more effective it is. What this test does not tell you is why one version is more effective. That has to be

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deduced; for that, you'll need to use one of the qualitative methods. Further control testing can then validate any changes you decide to make on the basis of the qualitative testing.

TEST WHEN IT MAKES SENSE TO

Not every document you create will merit testing, of course—even if there were world enough and time, not to mention the funds. You'll make the decision to test, based on a few factors. Ask yourself these two questions:

- How many people potentially will read this document?
- If they have trouble understanding or using the information, what's the worst that can happen?

A letter going to a few customers may not be worth testing. But if thousands of insurance customers will receive a brochure or e-mail that explains important renewal policy changes, you may want to test the text and compare formatting alternatives during development. The point of testing is to fine-tune a high-visibility, high-impact message so it has the greatest possible impact.

Which would you rather deal with: a bit of preproduction testing or a flood of calls from angry customers? It's best to hear from frustrated test-users while there's still time to make adjustments.

And if you've made a critical factual error, missed an ambiguous instruction, or underestimated the complexity of your message, the investment in testing can save you the expense of revising and reprinting a corrected document. Testing now also can protect your credibility and reputation later—an expense it's hard to measure, but a real one.

RESOURCES

Here are a few resources that can help you with document testing:

Testing Your Documents (plainlanguage.gov/howto/guidelines/bigdoc/testing.cfm). This article from plainlanguage.gov describes some of the types of tests recommended by the plain language initiatives in the U.S. Federal Government.

The Usability Methods Toolbox (jthom.best.vwh.net/usability/). This website, compiled by James Hom, brings together information about several different usability testing methods.

The Plain Language Association International website (plainlanguagenetwork.org) includes several articles that discuss document testing. This Google search lists most of them: google.com/search?q=testing+site:plainlanguagenetwork.org

Don't Make Me Think: A Common Sense Approach to Web Usability by Steve Krug (2000, New Riders Publishing). Although it's about testing websites, this book's guidelines can help you plan document usability testing.

Google Website Optimizer: services.google.com/websteoptimizer

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