

# Put Your Writing to the Test

FOUR EASY WAYS TO FIND OUT IF YOUR DOCUMENTS REALLY WORK

Roy Jacobsen

Writing, Clear and Simple



9 (A) (B) (C) (D) (E)  
10 (A) (B) (C) (D) (E)  
11 (A) (B) (C) (D) (E)  
12 (A) (B) (C) (D) (E)

13 (A) (B) (C) (D) (E)  
14 (A) (B) (C) (D) (E)  
15 (A) (B) (C) (D) (E)  
16 (A) (B) (C) (D) (E)

9 (A) (B) (C) (D) (E)

13 (A) (B) (C) (D) (E)

TABLE OF CONTENTS

Four Easy Ways to Find Out if Your Documents Really Work ..... 1

The bottom line, at the top..... 3

Introduction ..... 4

Why test ..... 5

How to test..... 8

    Protocol testing ..... 9

    Focus groups ..... 10

    Usability testing..... 11

    Testing large documents ..... 12

    Control studies ..... 13

When to test ..... 15

In a nutshell..... 17

Resources ..... 18

Acknowledgements..... 19

About the author ..... 20

Copyright..... 21

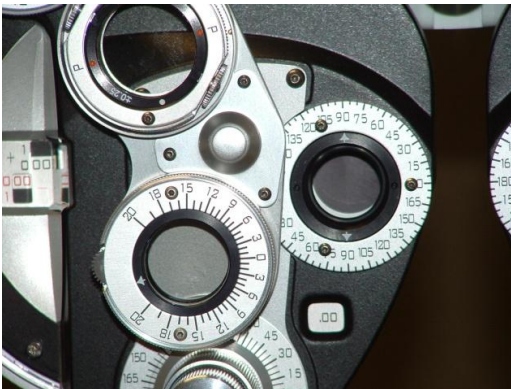
## THE BOTTOM LINE, AT THE TOP

Just like drug companies test new medications, just like auto makers test their cars, and just like movie studios test new films, you can—and should—test your writing.

There are four inexpensive methods you can use to test your writing to help ensure that it will achieve its goals: protocol testing, focus group testing, usability testing, and control studies.

These tests can help you in a number of ways: more effective marketing materials, increased customer satisfaction, improved brand reputation, fewer customer service calls, and decreased printing and distribution costs.

Sound interesting? Read on!



## INTRODUCTION

Ideally, the process for crafting copy looks something like this:

1. You figure out the major goal or goals for the document; that is, what the document is supposed to accomplish.
2. You identify your target audience, and you gather some demographic information about the readers you intend to inform or influence.
3. You track down the resources that you need—the sources of data, the references, the subject matter experts, and so forth.
4. You create an outline, and then write and re-write several drafts. You carefully choose the words and organization that will best convey your message to your readers. (If you're lucky, you have a structured review cycle, with an editor and a few subject-matter experts to review your drafts for grammar, spelling, style, clarity, and correctness.)
5. You publish the document—letter, brochure, pamphlet, manual, or what-have-you.

Testing will help show you whether your writing will do what you want it to do. Not only that, but it can help you fine tune your writing, maximizing your results.

And then, you cross your fingers, knock on wood, and rub that lucky rabbit's foot, hoping that the writing works, that it accomplishes its goals. Right?

After all, what more can you do?

There is one more action you can take to ensure that your writing will achieve its main goals:

Test it.

## WHY TEST?

Testing will help show you whether your writing will do what you want it to do. Not only that, but it can help you fine tune your writing, maximizing your results.

Whether you're with a business, a government agency, or a non-profit, testing can bring many benefits:

- More prospects, more leads, more sales: By testing your brochures, sales letters, fact sheets, and other marketing collateral, you can increase their effectiveness. This gives you more juice for your marketing squeeze.
- Increased customer satisfaction and strengthened brand reputation: Writing that gets your message across clearly leaves a good impression. Writing that leaves readers scratching their heads damages your image.
- Fewer customer service calls: Find out if messages sent to your customers really tell them what you think you're telling them. You'll reduce the likelihood that they'll have to call you to ask questions. Fewer calls = reduced customer service costs.
- Improved employee productivity: Testing isn't just for outward-facing documents. You can help employees find information faster and avoid costly misunderstandings by finding out whether operations manuals and employee handbooks clearly say what they're supposed to say.
- Prevent costly reprinting. Discover the flaws in your writing before you incur the expense of printing and distribution.

I can hear you asking "Really? Can document testing really accomplish all that?"

Yes and no.

Testing, all by itself, won't change anything. You have to take some action based on the test results.

Look at it this way: Let's say that Yoyodyne Inc. tests the widgets it produces and discovers that one hundred out of every thousand widgets are defective, a ten percent defect rate. That's bad. However, if they make no changes to their manufacturing processes based on what their testing shows, that defect rate will not change, and the testing was a waste of time.

If you decide to test your writing, you need to commit to revising your writing based on what the testing shows. If you make that commitment, then yes, document testing can make a big difference. Here are some real-world examples:

- In the mid-90s FedEx conducted usability tests to find out how much time employees spent looking for information in their operations manuals. They found that, on average, employees spent five minutes looking for an answer, and found what they were looking for only about *half of the time* (a 53% success rate). After revising these manuals, the average search time dropped to about three-and-a-half minutes, and the success rate jumped to 80%. The project team *conservatively* estimated \$400,000 in annual savings in just employee time—not including the reduced expenses from people getting wrong answers to their questions. FedEx would not have known how effective their original operations manuals were, or whether their revisions had made any difference, without testing them.

- Web application company 37signals used control testing to test variations of the text on the signup page for one of their applications. They discovered that the headline “30-Day Free Trial on All Accounts” resulted in 30% more sign-ups than “Start a Highrise Account.”
- The U.S. Veterans Benefits Administration used protocol testing on a letter asking for some information from benefits recipients, and found that their six test subjects had four different definitions of the phrase “gainful employment.” If the recipients had inconsistent definitions of that phrase, their responses wouldn’t be accurate, and the VBA was likely to make bad decisions based on that flawed information. The VBA rewrote the letter to state that they needed to know the last time the recipients were employed, which helped ensure that the agency received accurate information.

## HOW TO TEST

So, how do you test writing? There are four basic methods:

- Protocol (Paraphrase) Testing
- Focus Groups
- Usability Testing
- Control Studies

The method you choose depends on a few factors:

1. What is the goal of the text?
2. What kind of information do you want to collect, qualitative or quantitative?
3. What kind of document are you going to test?
4. What is your publishing context?
5. What is your budget?

For example: Do you want to find out whether a new version of a landing page is more effective at generating leads than the old version? If so, use control studies. Do you want to learn whether people understand what action you want them to take when they get to that landing page? Then use protocol testing.

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

If it's educational, informative text, test for how well readers understand the information. If you want your readers to take some action in response to the text, test for that correct response.

PROTOCOL TESTING: SAMPLE  
TEXT

He moved on as he spoke, and the Dormouse followed him: the March Hare moved into the Dormouse's place, and Alice rather unwillingly took the place of the March Hare. ● The Hatter was the only one who got any advantage from the change: and Alice was a good deal worse off than before, as the March Hare had just upset the milk-jug into his plate. ●

PROTOCOL TESTING

Protocol testing—also known as paraphrase testing—is one of the easiest and cheapest ways to gather qualitative information about a document. It helps show whether your readers really understand what the words are supposed to say. To do a protocol test, you conduct one-on-one interviews with a handful of representative readers. Prior to the interview, you prepare a copy of the text you want to test by breaking it into short chunks—usually one or two sentences—marked with cues. In each interview, you have the participant read the text out loud, stopping at the cues. After each cue, you ask them to explain, in their own words, what that part of the text means (hence the name “paraphrase testing”).

After they’ve finished reading and paraphrasing, you can ask a few broader questions, such as “What do you think is the main point of this document?” or “What would you do after reading this?”

Protocol testing has been used for several years by government agencies as part of their plain language initiatives, because it helps reveal problems like confusing words, missing information, and ambiguous instructions. (Remember the example I mentioned earlier, how the U.S. Veterans Benefits Administration used protocol testing to discover that different readers gave wildly different definitions for terms like gainfully employed and service-connected disability, definitions that often did not match the VBA’s.)

The beauty of protocol testing is that you don’t need to interview a huge number of readers to get useful information. Six to nine participants is a good sample size,

although you can still learn a lot by interviewing as few as three readers, according to the plainlanguage.gov testing guidelines.

### FOCUS GROUPS

Focus groups provide qualitative information about how people feel about a piece of writing. If copy is meant to influence or persuade readers, a focus group can help you determine how effective it is. You can also use focus groups early on, to help steer the writing development.

In a focus group, 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 present a number of questions about the document and guide the group through a discussion of their answers. The questions should not be leading or potentially biased toward a particular response.



## USABILITY TESTING

Usability testing is simply watching how a reader uses some text and gauging how successful they are, and how frustrated they become. This approach can be both qualitative and quantitative, and is ideal for testing instructional writing (such as user's manuals or assembly instructions), reference information, and forms.

For example, you might watch someone try to fill out a form or assemble a product using the instructions you provided. Or 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.

As you conduct a usability test, you should resist the impulse to intervene and guide the reader to the “correct” results, unless they become hopelessly stuck. (Your goal is to reveal any problems with the content, not cover them up.) You can also ask readers to “think out loud” during usability testing. This helps you find out how they process the information, their understanding of the terms used, the workarounds they attempt, and their ultimate reaction to problems they encounter.



And as you test, pay particular attention to the following:

- How many mistakes do the users make?
- Do they have to turn elsewhere for more information? If so, can they find what they're looking for?
- Do they become lost or frustrated?



## CONTROL STUDIES

A control study provides quantitative data—hard numbers—that reveal how well a document meets its goals. In a control study, you compare a new version of a document to an original version that serves as the control or *benchmark*. The differences between the two versions can be minor—different words used for a call to action, or different headlines—or they can be major—large blocks of content can differ, or the two documents can be completely different. You send these two versions to two groups of readers, measure the responses, and compare them to see which version was more effective.

Direct marketers have used control studies (also known as A/B testing or split testing) to test the effectiveness of sales letters for years now, and online marketers are using sophisticated forms of these tests on emails and web pages. But there’s no reason not to use it in its simplest form on any document that has a measurable goal. For example, you can test which version of a brochure or letter results in greater enrollment in a program, or leads to fewer recipients calling a help line with questions.

Many bulk email services have built-in features you can use to perform control studies on your email messages. If yours doesn’t, or if you’re not using one of these systems, you’ll have to split your mailing list into two lists, send the revised version of the message to one list, and the control version



to the other one, and then manually compare the results.

For web pages, you can use a free tool from Google—the Google Website Optimizer—to perform control studies. You can set up two versions of a web page, with different headlines, different copy, and different graphics. When you have everything ready, the system will display different versions of the page to different visitors. It also tracks how often visitors perform your “target action,” which may be clicking a link for more information, subscribing to a newsletter, or clicking the “Order” button. And then Website Optimizer lets you know which version of the web page worked the best.

Control testing tells you which document is more effective and how much more effective it is. (And depending on the scale of the differences between the two, you may be able to isolate the specific words or phrases that are the most effective.)

What control testing won't tell you is why one version is more effective, why *these* words work better than *those* words. That has to be deduced. For that, you'll need to use one of the qualitative methods (protocol testing, focus groups, or usability testing).

“You’re not finished writing the document until you test it. You should approach testing as something you do *during* the writing process.”

—Melodee Mercer,  
Lead Plain Language  
Instructor,  
U.S. Department of  
Veterans Affairs

## WHEN TO TEST

First off, don’t start with the mindset that you test a document *after* it’s finished. Testing should be integral to the writing/reviewing/rewriting process. Some tests, such as focus groups, make more sense when done early in the process, while others can happen closer to the end of the cycle. But remember that testing *will* show you things that need to change, so think of testing as part of the package.

You don’t need to test every document you create—even if you have the time and budget. Here are some questions that can help you decide when you should test, and which tests you should use:

- “Is this document meeting its goals? If not, do we know why not?”
- “How many people will read this document?”
- “Is this a new type of document for our organization?”
- “Is it worth our time to improve the response to this document?”

Perhaps the most important question you should ask when deciding whether or not to test a document is this:

“If people don’t get this document’s message, what’s the worst thing that can happen?”

And when you try to predict the consequences of an ineffective document, remember to think about *all* of the potential consequences for your organization and your audience: time, money, and liability.

A low-stakes letter going to a few customers may not be worth testing (although you should have someone review it to be sure it's clear). But if thousands of customers will receive a letter that explains important policy changes, you may want to test the text and compare wording changes during development. The point of testing is to fine-tune a message so it has the greatest possible impact, and to correct problems before they're out there for the whole wide world to see.

You can't un-break an egg, and you can't un-publish a document. Which would you rather deal with: a bit of testing, or a flood of calls from confused or angry customers? It's best to learn about potential problems during pre-publication testing, when you can still make adjustments.

Maybe you've made a tiny-but-critical factual error. Maybe those instructions that you thought were crystal clear are murky and ambiguous to your readers. Maybe you underestimated the complexity of your message.

If so, the investment in testing can save you the expense of revising, reprinting, and republishing, not to mention the damage control you have to do in the meantime.

Testing also can prevent damage to your credibility and reputation—a hard-to-measure but nonetheless real cost that is almost impossible to restore.



IN A NUTSHELL

Type of Test	Data	Sample Size	Measures	Best for
Protocol or Paraphrase Testing	Qualitative	Small (6 – 9 individuals)	Reader understanding	Short documents; surveys, questionnaires
Focus Groups	Qualitative	Small (8 – 12 individuals per group)	Reader attitudes, expectations, and responses  Document influence	Short, persuasive documents  Early stages of development
Usability Testing	Qualitative and Quantitative	Small (3 – 6 individuals)	Usability, clarity, correctness, and completeness	Forms, instructional text
Control Studies	Quantitative	Large (2 equal groups large enough to be statistically valid)	Real-world reader behavior  Effectiveness at triggering response	Documents with a measurable goal of changing reader behavior



## RESOURCES

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

The article “Testing Your Documents” from plainlanguage.gov ([www.plainlanguage.gov/howto/guidelines/bigdoc/testing.cfm](http://www.plainlanguage.gov/howto/guidelines/bigdoc/testing.cfm)) describes some of the tests used in the plain language initiatives in the U.S. Federal Government.

The Plain Language Association International website ([plainlanguagenetwork.org](http://plainlanguagenetwork.org)) includes several articles that discuss document testing. This Google search can help you find many of them:

[google.com/search?q=testing+site:plainlanguagenetwork.org](http://google.com/search?q=testing+site:plainlanguagenetwork.org).

*Don't Make Me Think: A Common Sense Approach to Web Usability* (2000, New Riders Publishing), and *Rocket Surgery Made Easy: The Do-It-Yourself Guide to Finding and Fixing Usability Problems* (2010, New Riders Publishing), both by Steve Krug. On the surface they're about testing websites, but these books provide guidelines that can help you plan document usability testing.

The Usability Methods Toolbox ([usability.jameshom.com](http://usability.jameshom.com)), compiled by James Hom, brings together information about several different usability testing methods.

Google Website Optimizer: [services.google.com/websiteoptimizer](http://services.google.com/websiteoptimizer)

## ACKNOWLEDGEMENTS

I first learned about document testing from Melodee Mercer of the U.S. Veterans Benefits Administration. Thank you to Melodee and the other fine folks at [www.plainlanguage.gov](http://www.plainlanguage.gov).

This ebook had its genesis in an article I wrote for *The Editorial Eye*. Thanks to *Eye* editor Lin Jorgensen for helping hone the ideas that ended up here.

Thank you to the professional communicators who attended the presentations based on this information. Your questions and feedback have been invaluable.

Thank you to Margie Shoop, who freely gave her thoughtful comments and suggestions.

Nate Mattson of Sundog Interactive ([www.sundog.net](http://www.sundog.net)) generously shared his experiences in how A/B testing is used in marketing campaigns.

Thanks to my friend Chris Hemmah of [shortprinter.com](http://shortprinter.com) for unleashing his inner Piers Morgan on my design and layout skills.

Finally, to my wife Paula, the biggest THANK YOU imaginable for believing in me.

### Image credits:

All images were found on Stock.XCHNG ([sxc.hu](http://sxc.hu)).

- Carl Dwyer (group meeting)
- Jean Scheijen | [www.vierdrie.nl](http://www.vierdrie.nl) (cracked walnut)

- Jacob Power (eye exam instrument)
- Gilbert Tremblay (broken eggs)
- Jeff Prieb (labyrinth game)
- Patrick Moore (books)

### ABOUT THE AUTHOR

I'm a writer, editor, speaker, and writing coach with more than 27 years of experience writing and editing in a number of fields, including software, health food, and agricultural economics research.

If you have questions about document testing, if you want to talk about a possible project, if you think this ebook is the bees knees or bites the wax tadpole, you can contact me at [royj@writingclearandsimple.com](mailto:royj@writingclearandsimple.com).

I'd love to hear from you.

Really.

## COPYRIGHT

This work belongs to Roy Jacobsen.

This work is licensed under the Creative Commons Attribution-NonCommercial-NoDerivs 3.0 Unported (CC BY-NC-ND 3.0) License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-nd/3.0/> or send a letter to Creative Commons, 171 Second Street, Suite 300, San Francisco, California, 94105, USA.

## WHAT DOES THAT MEAN?

That means you are free to share this work with your family, friends, co-workers, and perfect strangers. You can send them via e-mail or distribute them on your website. You can print it out and give copies away in your office, in your neighborhood, or on the street corner. You must give Roy Jacobsen credit as author of this work. You may *not* change this work in any way, or build upon it, or charge a fee for it, or use it for any commercial purpose.

## DISCLAIMER

I have made every effort to be sure that the information contained in this book is accurate; however, I assume no responsibility for errors, inaccuracies, omissions, or inconsistencies.