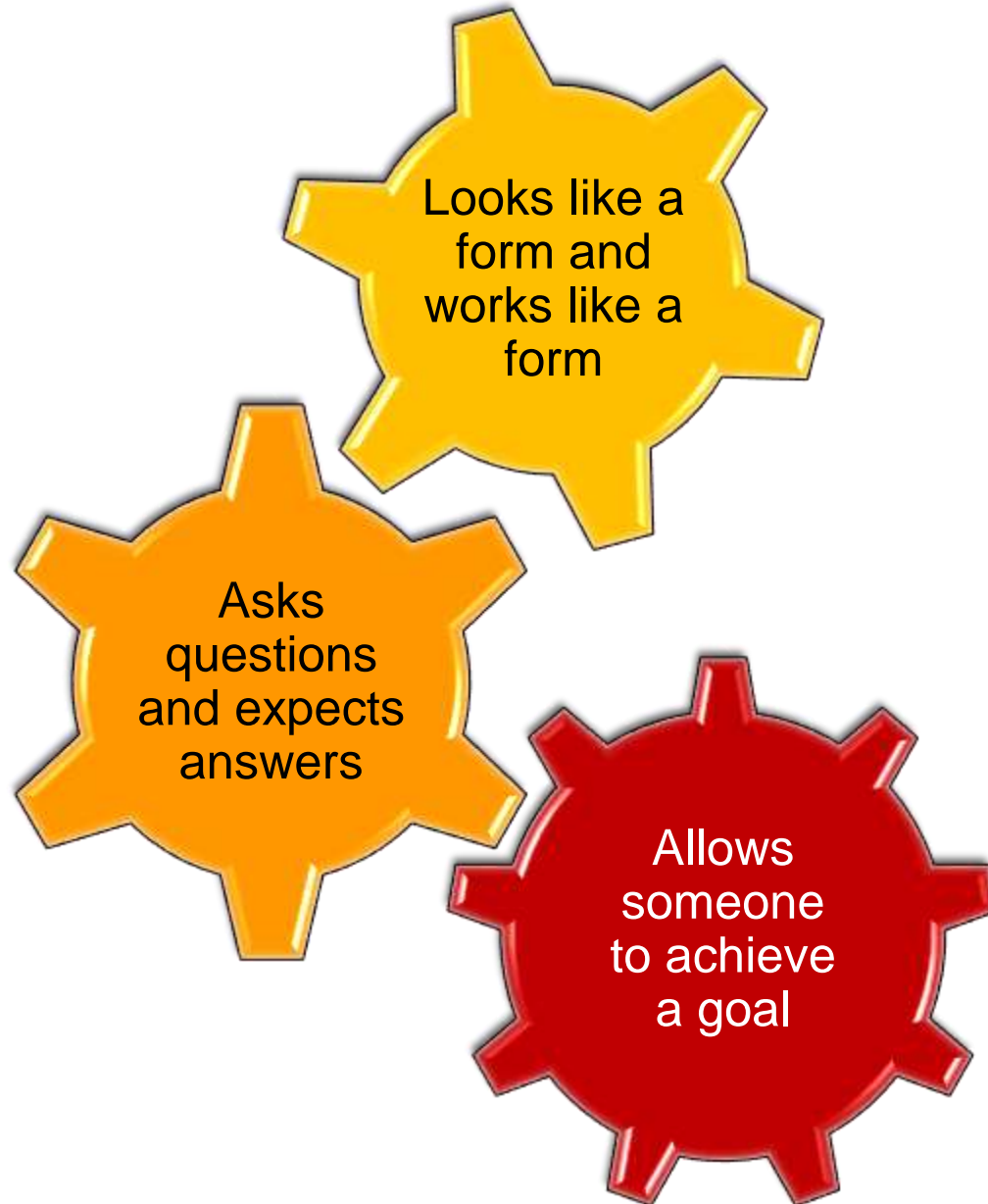


# How to look at the content in a form

Content meetup, Longbenton, June 2016

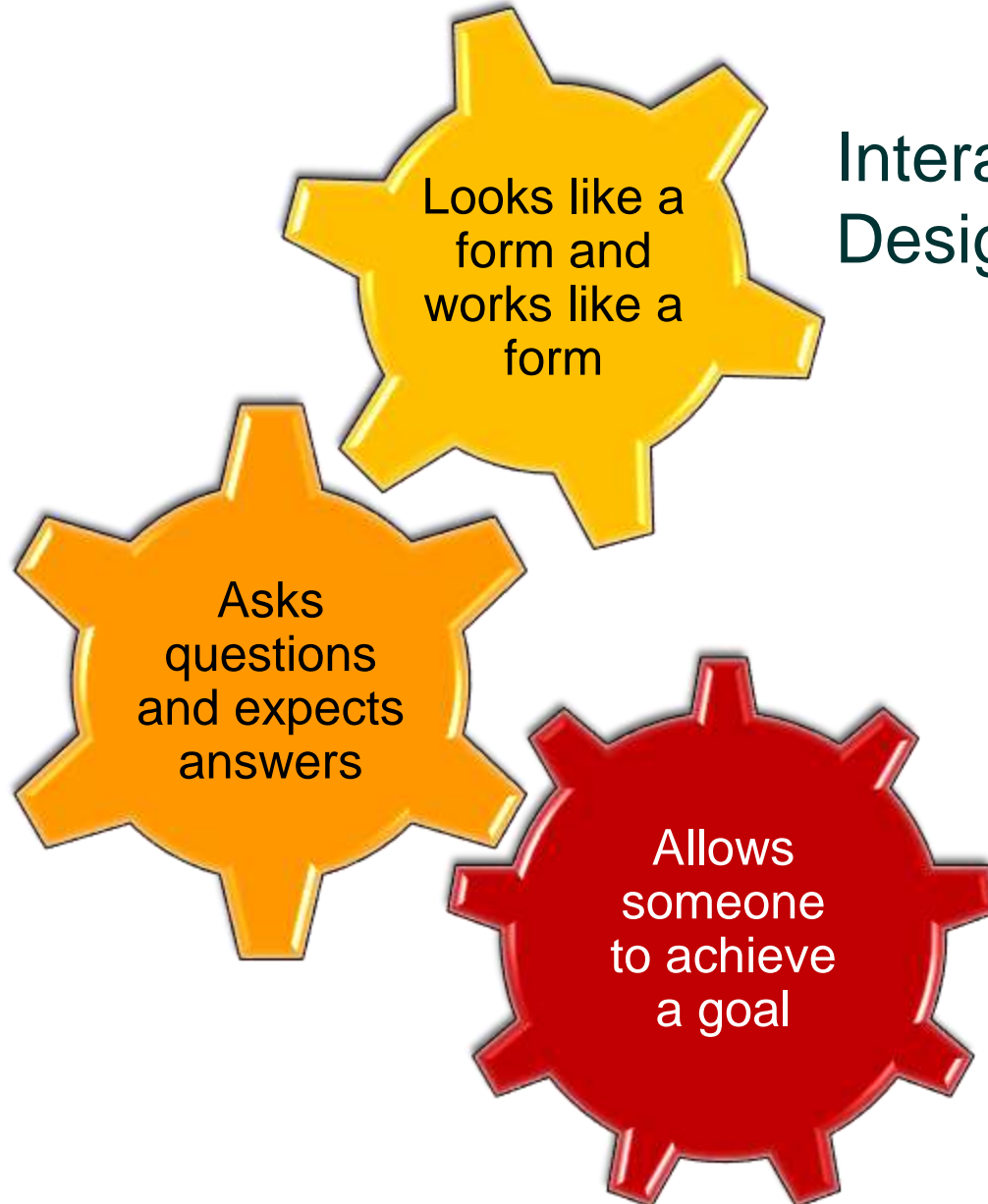
Caroline Jarrett @cjforms

# It's a form if it ...



# Design is important for forms

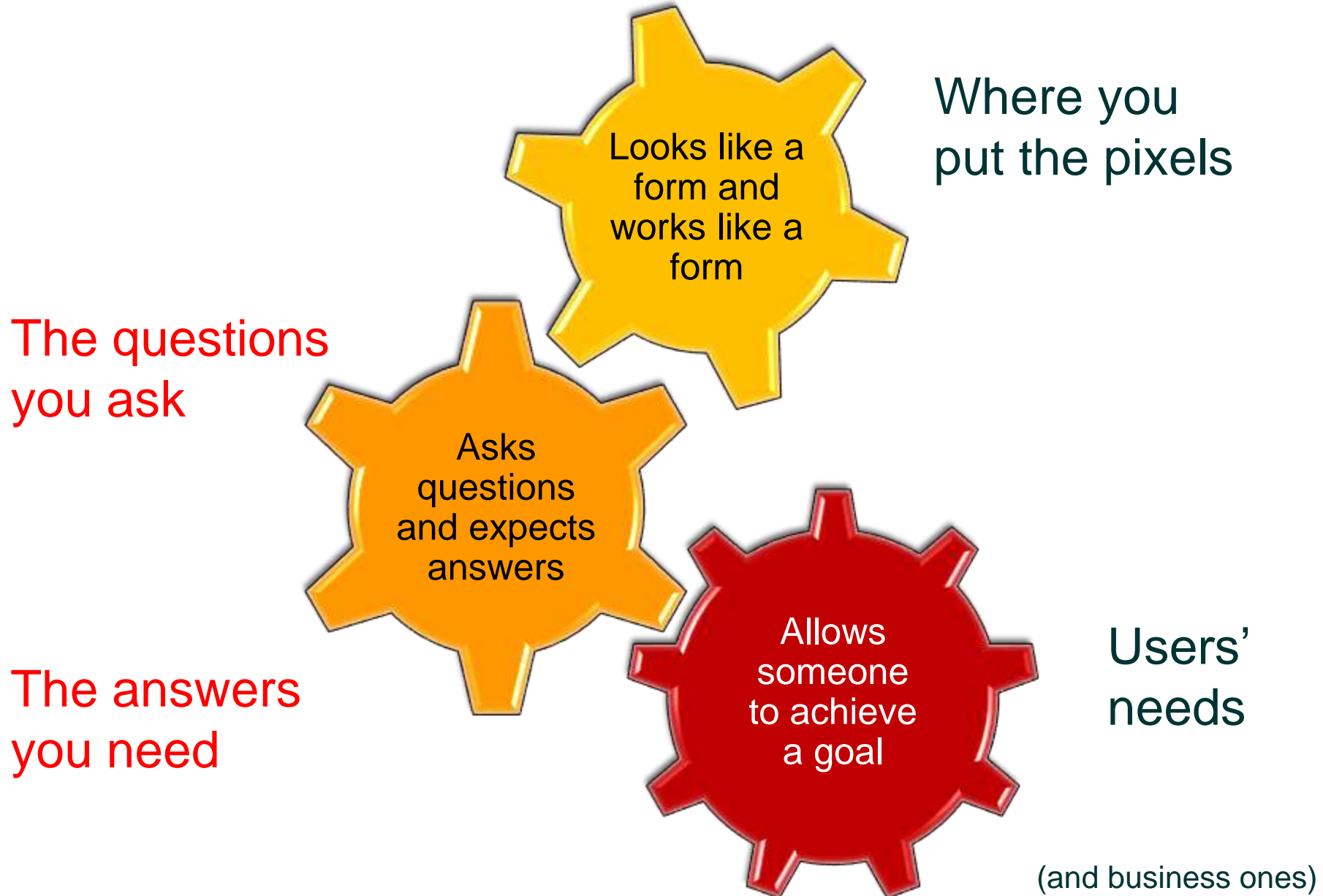
Content  
Design



Interaction  
Design

Service  
Design

# Start with users' needs



# A great form works well across all three layers

Appearance

Easy to use  
Easy to read

Conversation

Easy to understand  
Easy to answer

Relationship

Easy to get it done  
Easy to move on

# How to look at a form

Step 1

Don't look at it

yet

## Step 2

Choose a persona

Write the story of why that  
persona is filling in the form

write down  
your assumptions



## Step 3

Fill in the form  
as that persona,  
as honestly as you can

keep notes

## Step 4

Now look at it

How did it work across  
the three layers?

Appearance  
Conversation  
Relationship

## Step 5

# Do user research

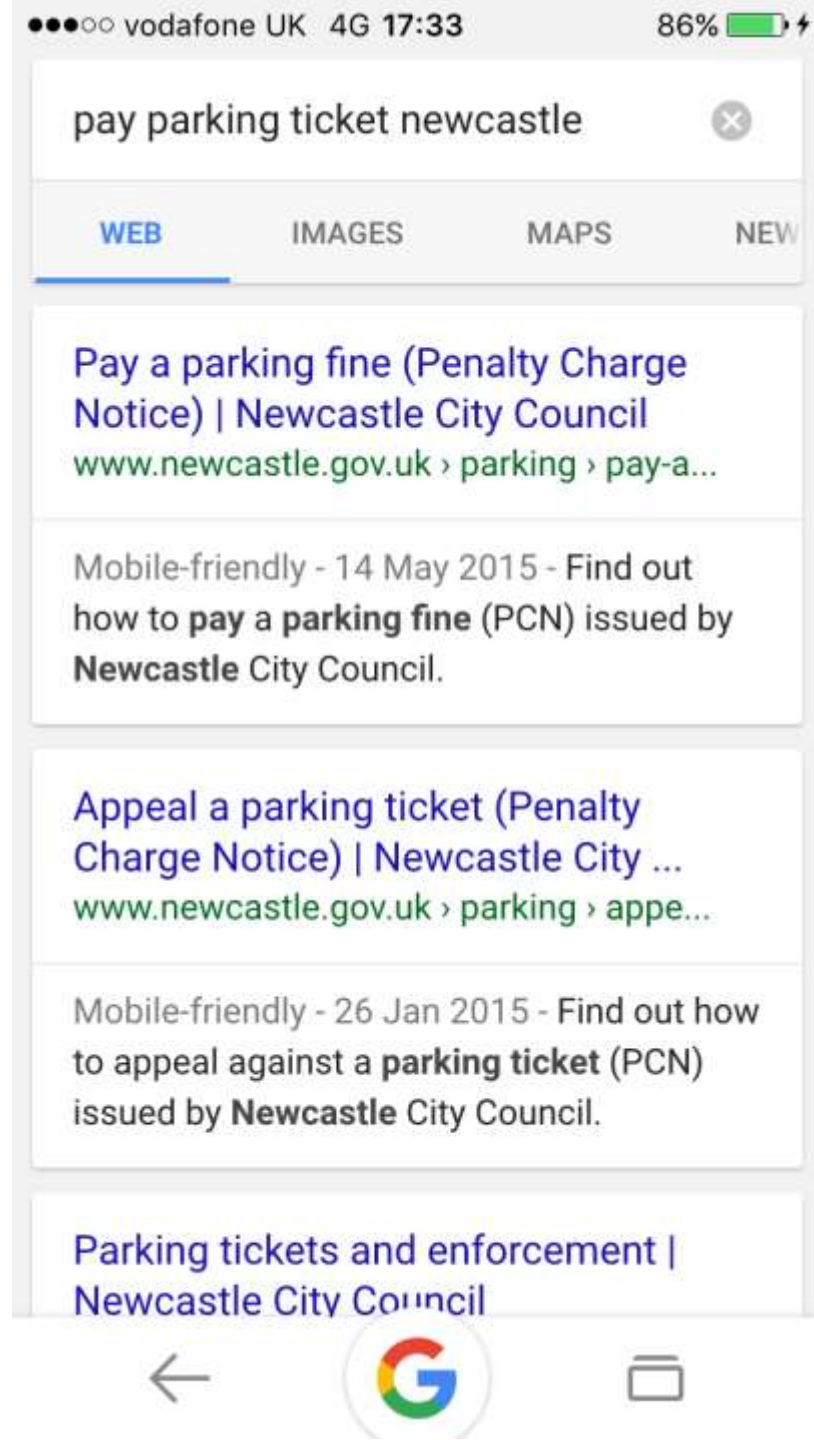
|               |                                    |
|---------------|------------------------------------|
| Appearance:   | How do users interact in practice? |
| Conversation: | What words do users actually use?  |
| Relationship: | What are the real users like?      |
|               | What are their needs?              |

# Paying for a parking ticket

I need to pay  
a parking ticket  
in Newcastle.  
I've lost the ticket.

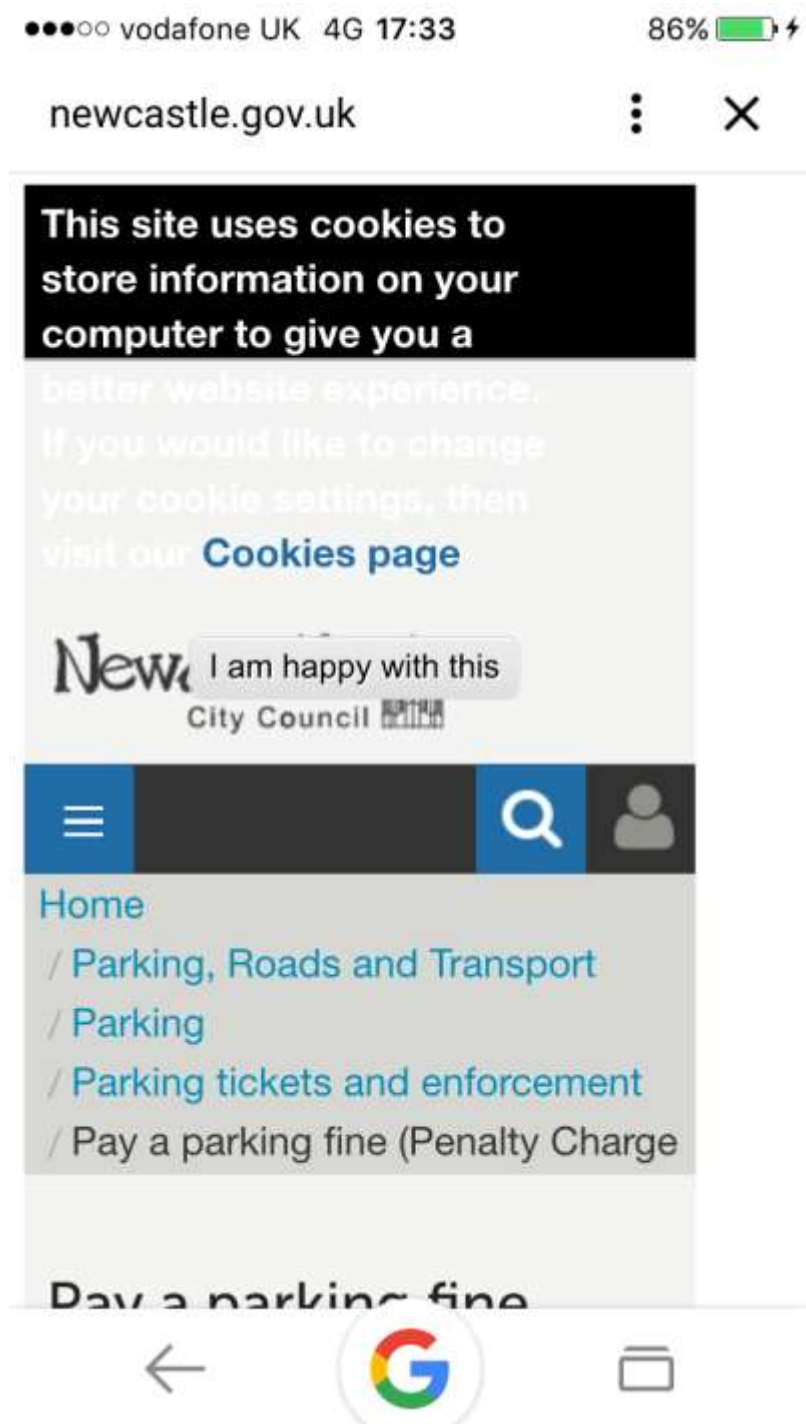
I need to pay  
a parking ticket  
in Newcastle.  
I've lost the ticket.

Notice the words



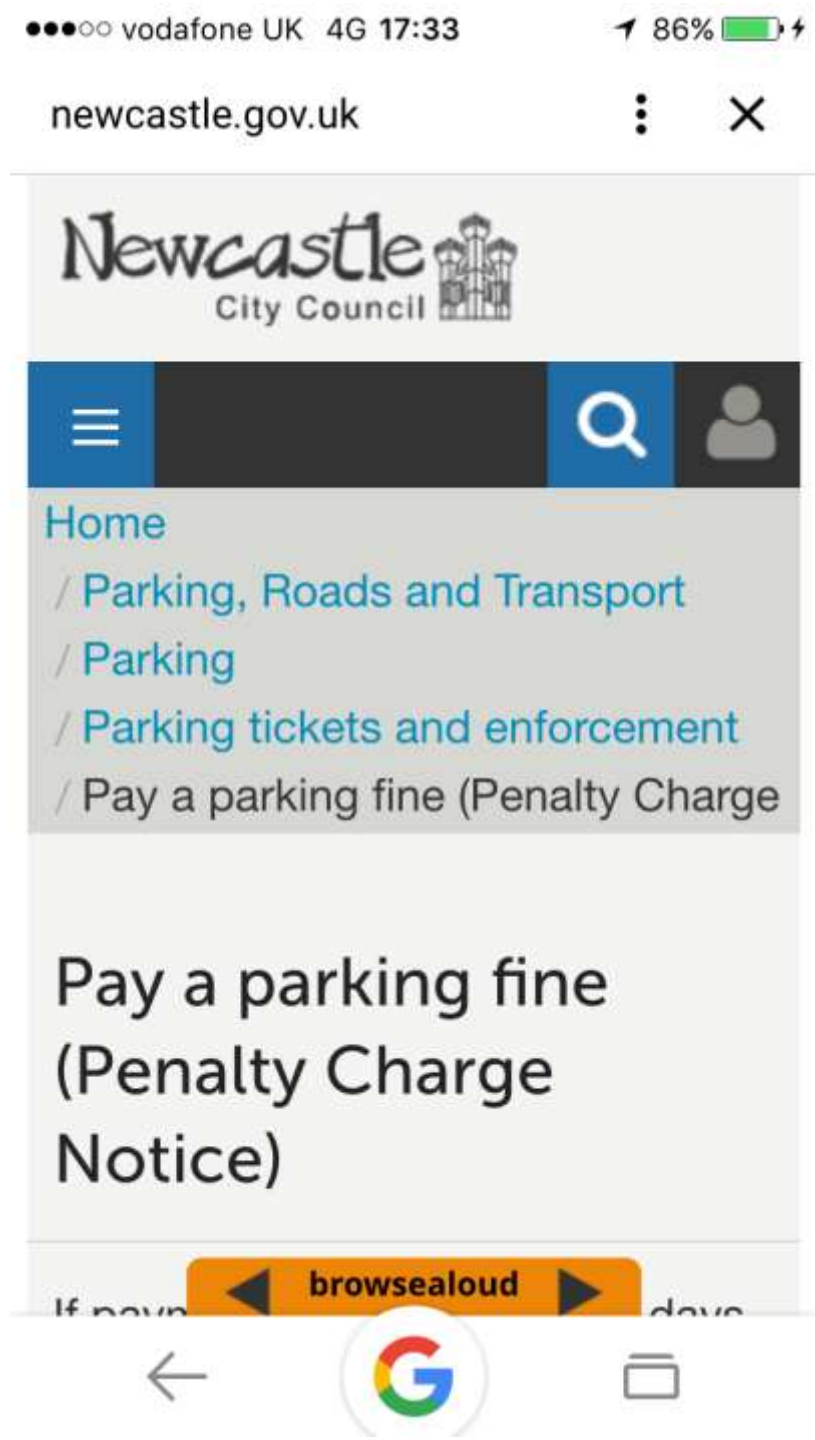
I need to pay  
a parking ticket  
in Newcastle.  
I've lost the ticket.

Words?



I need to pay  
a parking ticket  
in Newcastle.  
I've lost the ticket.

Words in context





I need to pay  
a parking ticket  
in Newcastle.  
I've lost the ticket.

Will I read this?

## Pay a parking fine (Penalty Charge Notice)

If payment is made within 14 days of the date that the PCN was served a discount of 50% of the penalty charge is applicable (that is £25.00 or £35.00 would be due).

Where a PCN has been issued following enforcement by the ANPR car (that are PCNs beginning with NU90) the 50% discount is available for 21 days after the joint PCN/Notice to Owner is served.

## Pay online

Pay yo  online

I need to pay  
a parking ticket  
in Newcastle.  
I've lost the ticket.

What about this?

The screenshot shows a mobile browser interface. At the top, the status bar displays 'vodafone UK', signal strength, time '17:34', and battery level '86%'. The address bar shows 'parking.newcastle.gov.uk'. The page header includes the 'Newcastle City Council' logo and a navigation menu icon. The main content area is titled 'PCN Details' and contains the following text: 'You can use this site to pay for a Penalty Charge Notice (PCN), to submit an appeal or to view information about the contravention. Details regarding a PCN will usually appear 1 working day after the PCN was issued or 3 days in exceptional circumstances.' Below this text is a form titled 'PCN details' with two input fields: 'Vehicle Registration Number' and 'Penalty Charge'.

PCN Details

You can use this site to pay for a Penalty Charge Notice (PCN), to submit an appeal or to view information about the contravention. Details regarding a PCN will usually appear 1 working day after the PCN was issued or 3 days in exceptional circumstances.

PCN details

Vehicle Registration Number

Penalty Charge

I need to pay  
a parking ticket  
in Newcastle.  
I've lost the ticket.

Oh dear.

vodafone UK 18:28 100%

parking.newcastle.gov.uk

Newcastle City Council

PCN Search > PCN Details

**PCN Details**

⚠ You must type Penalty Charge Notice

**PCN Details**

Vehicle Registration Number

Penalty Charge Notice

Search

← G →

# How to look at a form

# Tip

## Be kind.

Whenever we're looking at a form,  
we know that people have worked hard  
to improve it from the previous version.



Step 1

Don't look at it

yet

## Step 2

Choose a persona

Write the story of why that  
persona is filling in the form

write down  
your assumptions

“We’ve started to pay the Keeper”  
Friends decide to turn their hobby into a club





## Step 3

Fill in the form  
as that persona,  
as honestly as you can

keep notes

Go to GOV.UK  
Search for CT41(g)

<http://bit.ly/concon16>

## Step 4

Now look at it

How did it work across  
the three layers?

Appearance  
Conversation  
Relationship

# Tip

Pick the most important thing

1

---

2

---

3

---

## Step 5

# Do user research

|               |                                    |
|---------------|------------------------------------|
| Appearance:   | How do users interact in practice? |
| Conversation: | What words do users actually use?  |
| Relationship: | What are the real users like?      |
|               | What are their needs?              |

# How to look at a form

1. Don't look at it.
2. Choose a persona and write the story of why that persona is filling in this form.
3. Fill in the form as that persona, as honestly as you can.
4. Now look at it.  
How did it work across the three layers?
5. Do user research  
Investigate your assumptions

Easy to understand  
Easy to answer

# Are these familiar words?

Please fill in and return this form to us as soon as possible to help us update our records.

- You should operate PAYE and deduct National Insurance contributions from all remuneration paid, including honorariums and fees paid or credited to employees and office holders.
- You must send us a return of all annual payments you make, including some interest payments, and the Income Tax deducted from them.

Throughout this form the word 'club' means club, society, voluntary association and other similar body.



# Simple language isn't always plain language

**4** To which address should all tax forms be sent if different from question 2 above?

|          |
|----------|
|          |
|          |
| Postcode |

# Language is plain if we can...



# Tip

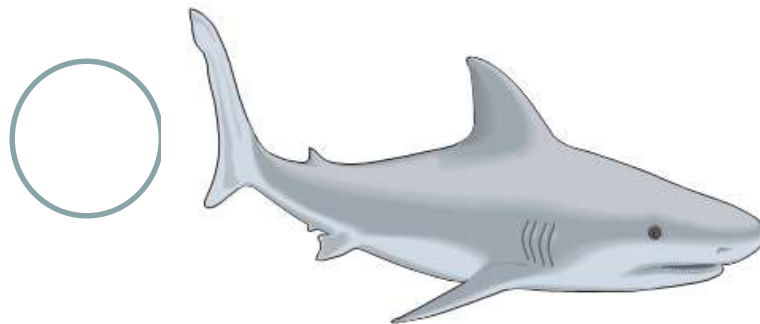
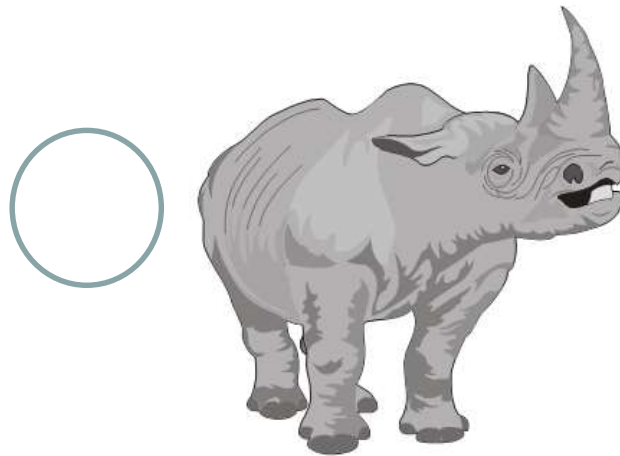
## Test your forms with people

Ask them to explain to you what the questions mean to them, and what answers they would like to give.



# The “dolphin = rhino or shark?” problem

Ms Dolphin, please identify yourself as one of these:



# Questions with only 'yes' and 'no' answers can be tricky

|                            |                          |     |                          |
|----------------------------|--------------------------|-----|--------------------------|
| <input type="checkbox"/> 9 | Is the club a charity?   |     |                          |
| No                         | <input type="checkbox"/> | Yes | <input type="checkbox"/> |

# Some possible answers to the question

Is the club a charity?

- No, and we don't have any plans to be a charity
- We've applied to be a charity but we don't yet have the number
- Yes, and our number is XXXXX



Easy to get it done  
Easy to move on

# Let's have another look at that introduction

Please fill in and return this form to us as soon as possible to **help us update our records.**

- You should operate PAYE and deduct National Insurance contributions from all remuneration paid, including honorariums and fees paid or credited to employees and office holders.
- You must send us a return of all annual payments you make, including some interest payments, and the Income Tax deducted from them.

Throughout this form the word 'club' means club, society, voluntary association and other similar body.



# Tip

Track a sample of forms through your process to find out how you use the answers



# A great form works well across all three layers

Appearance

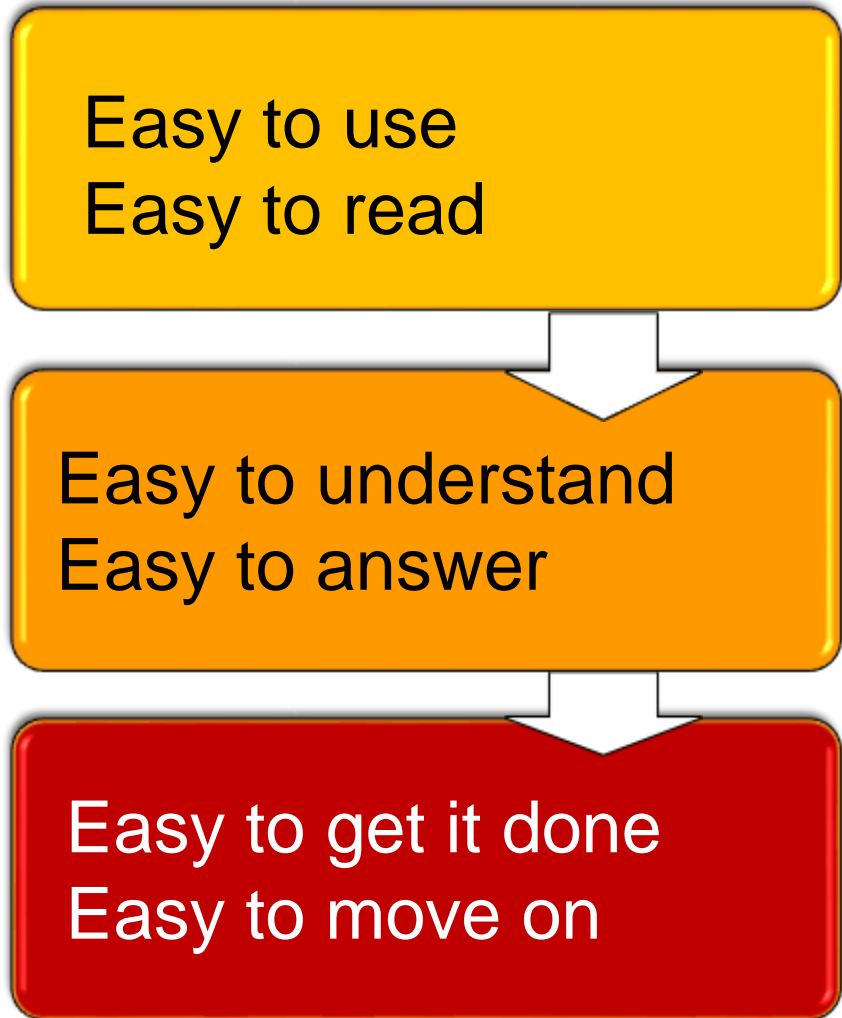
Easy to use  
Easy to read

Conversation

Easy to understand  
Easy to answer

Relationship

Easy to get it done  
Easy to move on



More slides <http://www.slideshare.net/cjforms>

# Forms that work

Understanding forms to  
improve their design

## Design tips for surveys 2012

Caroline Jarrett

User Interface Engineering / Rosenfeld Media Seminar



## Design tips for complex forms Malta 2012

Caroline Jarrett



## Design tips for complex forms 2011

Caroline Jarrett

J.Boye Conference Denmark



# Caroline Jarrett

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