Start a plain language initiative in your organization: A step-by-step approach

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As the world rapidly becomes more crowded, complex, and interconnected than we ever imagined, the plain language movement is taking off.

- Businesses know that they increase their market share when customers are not confused or frustrated.

- Public agencies know they save money and serve people better when citizens understand.

- Translators know they can do their job properly when language isn't bogged down by "legalese" or bureaucratic jargon.

More and more agencies and businesses are starting plain language initiatives. . They often start with training so their employees learn the techniques of writing and designing clear documents and web pages. That's a good start, but it's not enough.

The bigger challenge follows: making plain language move forward in the real world of their organization.

After leading perhaps 60-70 large and small plain language projects over the past nine years, I have found that the "writing piece" is an amazingly small slice of the undertaking.

If you are a new plain language project manager, here are 10 steps to help you navigate the managerial obstacles that may lie before you:

Step 1: Present your proposal as a solution to a business problem your managers already want to solve.

Step 2: Start with a simple project.

Step 3: Find a champion who is a respected in your workplace. Get that person to support your project.

Step 4: Get the right mix of people involved.

Step 5: Get help.

Step 6: Build trust with your team members and subject-matter experts.

Step 7: Negotiate throughout the writing process.

Step 8: Conduct usability tests with typical customers. You will need a reality check.

Step 9: Decide upfront how you will measure the success of your project, and get benchmarks right away.

Step 10. Market the project.

Step #1

Present your proposal as a solution to a business problem your managers already want to solve.

If you have a plan – or a mandate – to revise terrible, bureaucratic letters, forms, or web pages for your organization, not everyone will be happy about it. It may sound like a brilliant idea to you and to your top management. But to the day-to-day managers, it may sound like a lot of work, and many hours of staff time not devoted to routine tasks. They will want to know upfront what the pay-off will be.

This in itself is a very good way to focus your plain language project. *You* already know that creating clear applications for benefits, appeal rights and voting instructions, for example, is the right thing to do. But customer misunderstandings and complaints caused by poor documents also slow down businesses processes, and increase your organization's costs.

Ask the program *itself* to select a project that might solve a problem, save time, or reduce expenses.

For example, if half of the cosmetologists applying for a state license fail to pay the correct fee because the instructions are ambiguous, then the managers might consider the benefit of making the instructions crystal-clear. They may have fewer forms to send back with letters, fewer phone calls, and fewer frustrated cosmetologists.

Make plain language a solution to a very specific business problem managers and staff are motivated to correct, rather than a noble cause you are presenting to them as an outsider. The goal is to get customers to read, and to understand what they read, so they can avoid hassles and understand their rights and requirements. But the goal is to also make your organization run more smoothly and inexpensively.

Strangely, even though overly technical or bureaucratic explanations regularly cause huge backlogs and costs for organizations, confusing documents aren't often pinpointed as the problem. State executives may wonder why they can't cut the time it takes to process a claim. But when the hands-on managers and customer services reps are asked, they often quickly point to bad forms or instructions. *They* know they cause customers to send in the wrong paperwork or misunderstand deadlines because *they're* the ones on the phone correcting the errors.

Once managers understand you are a potential problem-solver – a problem they, not you, have pinpointed -- they'll be much more willing to devote time to your project.

Resources:

Read Joseph Kimble's classic piece on how many businesses and government agencies improved their performance and solved business problems by using plain language: www.plainlanguagenetwork.org/kimble/dollars.htm

Step #2

Start with a simple project

When I began working on plain language revisions, I was ready to take on every single convoluted, bureaucratic, outrageously unfair document I could uncover in the state agency where I worked. A veteran plain language consultant I was working with at the time knew better. She'd been in the battle for 30 years. "You can't change the world overnight, Dana," she advised.

She was right for two reasons.

- First, smaller projects take less time. If your small, six-month project is a success, your organization will know about the benefits of plain language sooner than if you'd launched a three-year project to rewrite 1,000 form letters.
- Second, a small project will give you a feel for the challenges ahead and give you the experience you'll need for a larger project.

So, instead of mapping a plan to revise every single document and web page in your organization, **create a simple, targeted project aimed at solving a specific problem**.

- It could be a single form letter your hotline manager says increases calls by 90 percent each time it is mailed.
- It could be a home page with unclear link labels that consistently guide customers to the wrong part of your site.

Keep it simple and be clear about what the project's business goal is.

If the improvement works, it will be obvious, the idea will catch on and people will want you to continue your work. **Don't try to change the world overnight.**

Step #3

Find a champion who is respected in your workplace. Get that person to support your project.

Is your plain language project changing an important form used by 100 nurses in a hospital? Try to win the support of a respected nurse supervisor.

Is the goal to simplify a letter informing thousands of veterans each year that their claim for vocational benefits has been accepted? Enlist the help of a long-time claim manager who is popular and respected on the floor.

If you have an insider on board who truly supports the project, he or she will be a far more effective agent of change than you. You're the outsider, after all.

Besides having the influence of an insider-sponsor who can reassure others that your plan might work, this person is in a position to:

- Help you make good choices about the people to involve.
- Fill you in on the history of how the problem document developed in the first place.
- Alert you to the inevitable land mines, such as the person who wrote and believes in the offending document, the change-resistant manager, or the worst time of year for starting new projects.
- Explain how the document or web page needs to be consistent with other parts of the process, such as programming or an attached document.

Example:

One of my first plain language projects was to create clearer form letters sent by claim managers to workers, employers and doctors in workers' compensation cases. It was a proposal I made to the program, rather than the other way around. Ultimately, it was approved because the agency director was a big plain language supporter. But the project never really took off. I hadn't selected a specific project they were motivated to undertake. What's more, the timing was wrong. The busy program was in the midst of many other changes that had to take precedence. I hadn't done my homework.

About five years later, many other programs in the agency had begun to embrace our "Plain Talk" initiative. Also, a new director signed a plain language policy. This time, the claims program was ready. Key managers in the program were supporting the idea. It developed a training plan and established its own successful team of experienced claim managers who've rewritten scores of form letters and now welcome my occasional help. Because they are respected insiders, they get regular feedback about what needs fixing.

Step #4

Get the right mix of people involved

You won't be writing clear documents by yourself. You will need to work with a team that includes:

- Subject-matter experts who talk every day with the customers who use the documents.
- A seasoned manager who understands the program's policies and how the document "connects" to other letters, forms, and web pages in your organization. For example, changing the language on one letter may require you to make changes on any number of forms, web pages, or legal notices to be consistent.
- A sponsoring executive with a bird's-eye view of the organization's overall business plan and goals.
- A graphic designer, unless your project is only form letters.
- A person familiar with how the document will be programmed, if it is a form letter. You will want to know upfront what fonts you'll be working with, whether you can boldface or indent, how many lines you'll have per page and how many characters per line.
- An attorney, if the document has legal requirements, such as an explanation of rights or specific legal citations.

An ideal first meeting would include all of the above around the table. After that, some of your team members – such as the sponsoring executive, the attorney, IT person and designer -- can be consulted as necessary.

Example

I recently completed a project to rewrite all of a large state agency's collections letters and legal notices. The 12-month project revised and streamlined a set of 35 documents, involved a core team of six, and involved usability testing with professionally recruited customers. Each year, many thousands of these documents are sent to business owners who are late with payments.

The program's goal is to reduce the amount of time highly trained revenue agents spend clearing up confusion caused by form letters. It hopes to increase annual collections by $500,000 to $1 million; a drop in phone calls is expected to give the agents more productive time to collect overdue amounts.

Example of plain language team: Collections Letter Project

Team member profession	#	Core team member?	Subject matter expert?	Familiar with customers?
Revenue Officers	3	Yes	Yes	Yes
Manager of all agency Revenue Officers	1	Yes	Yes	Yes
Manager of call center that contacts and negotiates with overdue customers	1	Yes	Yes	Yes
Plain language expert	1	Yes	Writer/facilitator	No
Executive Sponsor:	1	No	Yes – and familiar with top agency strategy	Yes – in this case.
Graphic designer	1	No	No	No
Attorney	1	No	Yes	No
Programmer	1	No	No	No

Note: You also may want to consider involving a few people you trust from *outside* of your organization who would be affected by your project. For example, if you are changing a form that an accountant usually fills out for your customers, consider inviting an accountant you know, perhaps a civic-minded one who has helped on advisory boards before. That person would have in-depth knowledge of how the form works in the real world. Of course, you'd need to get advice from your executive management before taking this step.

Step #5

Get help

Before you start your plain language project you (and your team members) might need some training in how to plan, write, and test plain language documents.

In our Washington state agencies, many people now managing plain language projects are former journalists, public information officers, or communications professionals from the private sector.

If this is your professional background, you've learned how to write clearly, but you will want to learn more about:

- Specific technical writing skills that dramatically improve the clarity of, for example, instructions, web pages, and administrative rules.
- How to analyze the type of person you want to reach with your document, then figure out what information they most need – and at what reading level.
- Page design, which, is a critical element for both documents and web pages.

Here is our recommended reading list from the top people in this field:

Letting Go of the Words -Writing Web Content that Works, by Janice (Ginny) Redish.

*User and Task Analysis for Interface Design***,** by JoAnn T Hackos and Janice (Ginny) Redish,

Dynamics in Document Design: Creating Text for Readers, by Karen A. Schriver

Also:
Check out this excellent list of recommended reading on the plain language.gov site:
[Elaine: link to www.plainlanguage.gov/resources/journals/books.cfm.]

Step #6

Build trust with your team members and subject-matter experts

Writing is personal. It's important to respect this when you are revising a draft prepared by a subject-matter expert, whether an engineer, an office manager, or a personnel manager. People become attached to the terminology they use routinely in their profession and may become defensive when you suggest simpler language or shorter explanations. They know that what they have written is correct and think that if you revise it, you will change its meaning.

- Focus on the problem you are trying to solve together, not on the writing.
- Find things to praise about what they have written.
- Explore with respect the reasoning or history behind why they have written something the way they have: "Tell me about why you write, *This is our demand for election* , rather than, *You are now required to choose*."
- Refer to your rewrites as suggestions: "Take a look at what I've done and see what you think. Does this work for you? I changed the word *abate* to *fix*. Would this change the meaning or cause problems?"
- Draw the writing team into the discussion so you can listen to people with the same expertise debating among themselves.

Example:

I recently finished a project to overhaul a set of responses my agency sends when workers file complaints against their employers for not paying wages. As it turned out, I had recently rewritten a high-level letter composed by the woman who was to be the key member of my new team. She'd been justifiably hurt by my complete rewrite, mostly because no one in management had actually explained to her what was wrong with her earlier drafts, which they kept sending back to her.

When we began working together, she was clearly exasperated with the agency's "plain language thing." But once she realized I respected her expertise in wage law and was willing to work one-on-one with her to develop her skill, she became a solid writing partner. She soon realized that she needed only to write the way she spoke to workers on the phone each day, using ordinary language. In the end, she developed a flair for composing simple "translations" of the "government style" materials we were overhauling.

Step #7

Negotiate throughout the writing process

As you create plain language documents or web pages with your team, you will be sharing your drafts with subject-matter experts in your organization for accuracy. In some cases, you will be running it by an attorney to make sure your plain language "translation" is legally sound.

This is where many plain language efforts run into trouble. Because you want to make absolutely sure your rewrites are correct and legal, you may find yourself accepting without question the language changes the attorney or expert makes to your draft. They may argue that your phrasing needs to match the case law or that appeal rights must always be at the top of the document. They may say that to reduce the organization's liability, you must include the text of an entire code in the body of the letter. They may tell you that the simple word you substituted for the arcane word is inaccurate.

All of this may be perfectly true. However, it may also be true that the changes turn your draft into a confusing mess.

This is when it's important to negotiate. If you have a mandate to create clearer documents for your customers, then you have equal status around the team's table as the plain language expert. Consider yourself an advocate for the general public: the owner of the corner grocery store, the guardian of the foster child, the landscaper setting up a new business. If you have done your job, you know who these customers are and what tends to confuse them. They want you to speak up for them.

Revising into plain language is process of continual negotiation. If an attorney e-mails you a complex rewrite, start asking questions:

For example, you may e-mail back: "Thanks for your comments. I notice in the third paragraph, you changed the phrase ***fix*** *the hazard* back to ***abate*** *the hazard*. Is the word ***fix*** inaccurate? If so, would the phrase ***correct the hazard*** be an alternative? I'm concerned that many employers won't be familiar with the word ***abate***."

Sometimes a phone call works better.

In any case, it's important to talk it through. Sometimes the attorney or expert isn't aware that you have a specific reason for selecting a word. **In almost all cases, I've found that attorneys are supportive if they understand what your mission is.**

When you are starting out, it may feel uncomfortable to challenge professionals who are so much more familiar with the field you are writing about. However, you, as a plain

language writer, have expertise as well: you know how outside customers perceive the organization – and what makes sense to them. You deserve equal status at the table.

Resources:

For working with engineers and environmental experts:

The Washington State Department of Transportation developed a Reader-Friendly Document Tool Kit (pdf 571 kb) to help make environmental documents easier to understand. The main body of the tool kit provides tips and techniques you can use to create reader-friendly environmental documents. The appendices (pdf 3.08 kb) contain many tips and tools

For working with health care experts:

A good introduction to writing plainly about health care issues: *Plain Language: A promising strategy for clearly communicating health information and improving health literacy,* Office of Disease Prevention and Health Promotion, U.S. Dept. of Health and Human Services
www.health.gov/communication/literacy/plainlanguage/PlainLanguage.htm

A helpful guide to making privacy notices clear to patients, which will inspire any type of health care writing: *Plain Language Principles and Thesaurus for Making HIPAA Privacy Notices More Readable,* Health Resources and Services Administration, U.S. Dept. of Health and Human Services. www.hrsa.gov/servicedelivery/language.htm

A booklet covering a good range of health literacy issues and writing/design suggestions funded by Pfizer's Clear Health Communication Initiative:
http://www.pfizerpublichealth.com/PDFs/clearhealth_03_04.pdf

Working with attorneys:

The plainlanguage.gov site has a great listing of books and links that will show you how many in the legal profession are trying to kick the legalese habit:

www.plainlanguage.gov/usingPL/legal/books.

Step #8

Conduct usability tests with typical customers. You will need a reality check

At the beginning of your project, **make it clear to your sponsors that you will want to test your plain language drafts with people who would typically read them**.

This technique, called **usability testing**, is now being used routinely by many organizations and is the best way to know if your draft will work in the real world. You may need a modest budget for recruiting and to pay participants.

Usability testing doesn't ask typical customers "what they think" of your plain language draft, or how they feel about it. Instead, it has four to six typical customers – one at a time -- actually ***use*** the document while you observe and listen to their train of thought, which they've been asked to verbalize.

For example, the usability test may involve asking participants to fill out a form or find information on a web site, using only your plain language instructions as their guide. Can they do the task, or not? That's the real question that can't be answered by questionnaires, interviews, or focus groups.

This enormously interesting and helpful technique almost always reveals gaps in your instructions or simple misunderstandings your team had not anticipated. Sometimes just listening to the test participant talk about the experience of doing the task can reveal valuable information about how your organization is perceived in the community.

There are many firms that can professionally recruit the type of people you will need. The important thing to remember is that they must be unfamiliar with the document you are working on, but match the type of person who would use it. You want your document to work for someone brand-new to an issue in the real world, such as a worker in a high-risk injury who has never filed a workers' compensation claim or a person about to open a small business who has not been exposed to the paperwork.

Resources:

The Usability Professionals Organization's website links to many resources that will help you understand user-centered design and testing: www.upassoc.org/.

Step #9

Decide upfront how you will measure the success of your project, and get benchmarks right away

Soon after you select the business problem you will attempt to solve with your project (See Step #1), you will need to decide how you will measure whether or not your effort was a success. If you can get a jump-start on this, you will be glad you did.

For example, if you want to measure how much your new and very clear instructions reduce the number of businesses that send in incorrect tax payments due to miscalculations, you will need a benchmark. Your organization may already have a system in place that tracks how many of the payments are wrong each month.

In this case, the people who process the incoming payments may record each time they have to send the incorrect ones to the Wrong Payment Calculation Section. Currently, they may send 1000 each month. Your goal is to reduce that benchmark number. If you do, you can extrapolate how much staff time has been saved, which may translate into dollars saved or better use of staff time. But this can happen only if you have your benchmark in place.

People who have spent time with you on your plain language project will appreciate it if your team can show top management your project made a difference. Management, in turn, will appreciate it if they can tell customers or citizens that they have saved them money or reduce a hassle factor. If you are fortunate enough to get an undisputed performance measure, it won't be difficult to get support for more projects.

Much more information is available about performance measures. Here is a selection of resources that will help you get started:

Resources:

A simple list of potential performance measures for different types of business/organizations: www.orau.gov/pbm/sample/sample.html

A list of books and links to articles from the State of Washington's Government Management Accountability & Performance program: www.accountability.wa.gov/links/resources.asp

Step #10

Market the project

If your project has been successful, let people know about it. You've done important work and more people need to know about it. Here are a few ideas for marketing your plain language work:

- **Celebrate the project and honor the staff participants:** Your team needs to be recognized and thanked. Often, their participation has been a duty piled on top of their regular work. I sometimes organize lunches for teams and invite managers to attend. This way, information about the project gets to the executive level in a personal way and they are observing staff members being recognized. Lately, I've been using a director-signed Certificate of Recognition, passed out with a few personal words.

  If you are halfway through a promising project with a strong team, you can e-mail the team members' supervisor(s) with a compliment and an update. After doing this recently, one manager publicly thanked members of my team at her next staff meeting and handed out gift certificates.

- **If it there is a clear benefit to a specific group of your customers, let them know:** Your organization may work with business, medical, or advocate groups that offer advice and track issues. You may even send newsletters or regular updates to them. This is an opportunity to market the work you are doing to make it easier for them to do business with you, via plain language.
- **Let the rest of your organization know via your in-house newsletter or intranet site.**
- **Pitch the story** to a print news reporter you trust if your success is fairly dramatic. Journalists are often interested in subjects about writing and like to post before-and-after examples in their stories. You will have better luck taking this approach than simply sending a news release out to your organization's media list.
- **Organize an awards program:** Washington Governor Christine Gregoire sponsored a Plain Talk Award event in November 2007 to publicly honor agencies. The eight winners out of more than 60 entries accepted their awards at a leadership conference in front of 1000 people. Both the application process and the awards got the attention of state agency directors. It was a signal that she meant business when she signed her March 2005 Plain Talk Executive Order.
- **Create a plain language section of your organization's web site:** This is where you can post the before-and-after examples, as well as any guidelines or success stories you want to share.
- **Create before-and-after displays, posters or "Anti-Gobbledygook" buttons**.

Push for an official plain language policy so it's clear that plain, straightforward language is required when communicating with customers.

An example of one state agency's plain language policy

[Elaine: Link to the L&I policy document]

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