Planning and Evaluating to Communicate Successfully

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Communicating successfully does not start or end with writing and designing.

To communicate successfully, you must also **plan** both before and as you write and design. And you must review, edit, and **evaluate** drafts.

In this brief article, I

- define clear communication

- show a visual of a process that achieves successful communication

- delve into the issues to consider when planning

- review various ways to evaluate drafts to achieve the goals you set when planning

Defining clear communication

A communication is clear only if the people who must or should deal with it can

- find what they need,

- understand what they find, and

- act appropriately on that understanding,

    in the time and effort that they think it is worth.

Notice that this definition is about *people* and *behavior*.

With this definition of communicating successfully, you can see how important it is to focus on the people you are communicating with. That's why clear communication and plain language are also sometimes called "reader-focused communication."

Communicating successfully = communicating clearly = plain language = reader-focused communication.

Communication does not happen when you write. That's like shouting into empty space.

Communication happens only when someone else

- gets what you wrote (physically gets the paper or sees it on a screen)
- is willing to work with it
- is able to work with it
- successfully finds, understands, and acts appropriately

Showing a process for creating successful communications
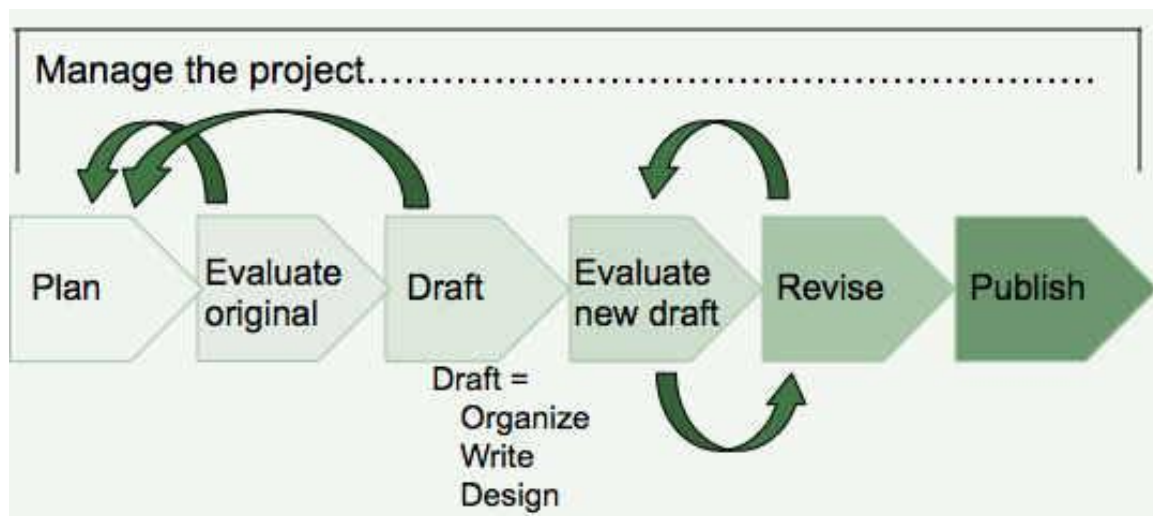
Both planning and evaluating help you focus on the people at the other end of your communication.

Expert writers plan before they write and design. They continually review what they write and design against their plans. They may update their plans as they proceed.

Expert writers also know that successful communication usually takes multiple drafts. They have internal techniques for reviewing, editing, and evaluating their writing and designs.

Research shows that evaluating drafts with a few of your readers is better than relying *only* on self-reviews, peer reviews, or editors. This applies to any communication that is going to (or will be seen by) many people. That communication might be a letter, email, notice, form, brochure, report, web content, or social media message.

As I'll explain in the section on evaluating, you should definitely review your work yourself. You and your colleagues should share and review for each other. You should work with editors. But that's not enough to assure that you are communicating clearly for the people you want to reach.

Let's look more deeply into planning and evaluating.

Planning to communicate successfully

To plan successful communications, you must understand

- Why? – your purposes – what you want to happen because someone got this communication

- Who? – your readers – who they are and their attitudes, abilities, and contexts of use

- How? – the way you will deliver the communication and the way they will receive it

- What? – the conversation – your key messages and your readers' questions

Why? Your purposes

We are not discussing novels or poetry. These communications are functional. You want people to do something after reading or using them.

To communicate successfully, you must define success for that communication.

For example:

When you create this communication	You want someone (or some people) to do this
Email your boss because you want to go to a conference	Your boss to say "yes"
A proposal for a new project	Your client or funding agency to agree to your proposal and fund it
Instructions for filling out a form	People who must fill out the form to do so correctly and completely without calling
Letter to business owners about missing tax payments	The business owners to pay the tax they owe
Information on an e-commerce website	People to buy your products

You may have learned in school to think of purposes as to inform, to persuade, to instruct, and so on. Those short verb phrases may be fine as your first thoughts about your purposes. However, they are not as useful to successful communication as a much more specific and measurable statement of what you want people to do.

To help you realize that you are communicating with people and that you want something to happen because you are communicating, use this format for a purpose statement:

My _____ (type of communication) will be successful if _____(these people, as specific as possible) _____(take this action / these actions)

The purpose statement I am suggesting also turns your focus from yourself to your readers. And that is necessary for reader-focused communication.

You can elaborate on "these people" with adjectives that are relevant to understanding "these people" for your specific communication – perhaps "very busy" or "curious" or "frustrated." That's what the next section is about.

You can elaborate on "take this action" with conditions that are your measures of success – perhaps "without calling for help."

Why? Your readers

If you are going to be reader-focused, as I suggest you must be, you must think about your readers.

A note about words: We don't have a perfect general word for the people we are communicating with. We can talk about "audience," "readers," "users," but none of these is perfect.

"Audience" is related to "audio" – to listen, but we are discussing written material not spoken communication.

"Readers" implies that people will read what we write – but our "readers" may not read every word.

"Users" comes from developing software and manuals – and some people object to "users" because it makes them think about people who take illegal drugs.

For a specific communication, you should use words that relate to the specific person or people the communication is for: "my boss," "reviewers of my proposal," "taxpayers," "hospital patients," "parents," and so on.

In this article, I use "readers" as the general word because it matches the idea of reader-focused communication. But keep in mind that many "readers" will skim, scan, and skip – not read every word carefully.

What do you need to know about your readers as you plan to communicate successfully with them? You need to

- identify them (for example: my boss, proposal reviewers, taxpayers, hospital patients, parents, …)

- add adjectives and phrases that help you remember their attitudes, abilities, and contexts (for example: busy, likely to be tired when reading this, anxious, reading in a second language, don't know / do know the technical vocabulary of this topic, …)

When you identify your readers, be sure you use a word for people. For example: if you are writing accounting instructions, don't say your instructions are for banks. A bank is a building. Who in the bank will use your instructions? Bank tellers? Bank managers? Those are people. Don't say your instructions are for the finance department. A department is an organization. Who in the finance department will use your instructions?

When you think about the adjectives and phrases to keep in mind, don't focus on what content your readers are looking for. That's a different planning question. The adjectives and phrases you want here are to help you get a better sense of your readers – to understand them better as people.

How? The medium and the devices

Clear writing is relevant whether you are sending a paper document or writing for the screen. But you may need to think differently about your approach.

- When you send a paper document (or a new email), you are starting a conversation. Your reader opens an envelope, picks up a brochure, or scans their inbox and wonders: Who is this from? What is this about?

- Writing for a website is different. There, your reader starts the conversation. They come with their question, their need.

So, you must think about the medium you are writing for.

When you are writing for online consumption, you must also think about the devices people are going to use to read what you write – Watch or another wrist device? Phone? Tablet? Laptop? All of those?

What? The conversation

Every successful communication is a conversation.

The conversation is a combination of your key messages and the answers to your readers' questions.

A great way to organize and write is to imagine a typical reader on your shoulder. Start with your key message. Then listen to your reader whispering a question to you – the question that typical readers would have after reading your key message. Answer that question. Listen to your reader whispering a next question to you. And so on.

You do not have to write your communication as questions and answers, although that is often a successful style. You can use other types of headings and other writing styles.

But going through the conversation in your head as you write will make you remember that successful communication requires both writer and reader.

Having your "reader on your shoulder" will keep you from, for example, starting with several paragraphs about the history of a benefit program when you realize that your readers want to know only what the program is and if they are eligible for the benefits.

Making your plan even more vibrant with personas and scenarios

To make that "reader on your shoulder" even more realistic and to help you converse comfortably with your readers, you can turn your notes into personas and scenarios.

Personas. A "persona" is a description of your typical reader with

- a photo

- a respectful name

- some characteristics to help you "see" the persona – age, education, occupation, family situation

- the adjectives or phrases that you put down that help you understand key points about your persona – literacy level, languages, words they know

and don't know related to your topic, what matters to them, their anxiety or curiosity, and so on

- a quote that the persona would say to you for you to keep in mind, for example:

"I'm so busy with my family and my job that I can only read my mail late at night when I'm tired. If your letter or notice looks hard to read, I'm likely to put it aside for the weekend. And then I might forget about it. Make it short and easy so I can deal with it right away."

If you are communicating with one person whom you know (for example: your boss), that person is your persona.

Much of what we write, however, is for a much wider set of readers. So, we have to create the persona from what we know about our readers.

The best personas come from actually getting to know readers or from gathering research others have done with readers of communications like the one you are working on. But even without that research, you can start with "assumptive personas" based on thinking realistically about your readers.

Just remember:

You are not your reader!

You know about the topic. Your readers may not. Your typical readers may be much older or much younger than you are. You may love to read. Your "readers" may not.

You may spend your workday dealing with your topic. Your readers may only have time to deal with it when they can snatch a few minutes from their busy lives. You may care a lot about how the program you are describing came to be. Your readers may not care.

The point of having personas is often to remember how different your readers are from you and your colleagues.

Scenarios. A "scenario" is the short story of when, why, and how your persona would get or go to your communication. You can add that to your persona to help you remember the context in which the persona would use your communication.

You can put your persona's questions into the scenario, making it more complete and specific for your communication.

For more on planning, including where to find examples of personas and scenarios, see the section For more information *at the end of this article.*

Evaluating to assure success

Expert writers continually review their work as they go. They realize that a polished finished product belies the messy reality of writing. The printed (or online) communication may be letter perfect, well organized, clearly written, in beautiful typography. But it didn't get that way in one steady, never revised, never corrected flow.

So how do you get from your plan through the process to final product?

You incorporate reviewing, editing, revising, and evaluating – and best by involving readers in that evaluation.

Reviewing, editing, revising by yourself

You are your best first reviewer and editor. But you should never be your last reviewer and editor.

As you think about the communication – as you organize the parts, write the sentences and paragraphs, create lists and tables, add visuals, choose type and color – keep your personas and their scenarios in mind.

After writing a bit, read it over. See what you can cut. See if you can use easier words.

Put your draft away for a few hours or a few days. When you take it out again, you may see places to edit, cut, revise.

Read it out loud. That's a great way to find sentences and paragraphs that are too long and words that people may stumble over.

Reviewing, editing, revising with your colleagues

Even with all the ideas in the previous section for editing your own work, you need other eyes to help you. After you've read your drafts a few times, you won't even see typos or missing words. Your mind fills in what you know you meant to write.

Share drafts with your colleagues. Read for each other.

Working with editors

Editors can help both with the "big picture" and with the details. Those are different tasks that require different skills. Some editors are great at both. Some specialize in one or the other.

When an editor is working on the "big picture" with you – sometimes called "developmental editing" – that's about your purposes, personas, and the conversation in your communication. It's about whether you have the right

content, organized in the right way. It's about whether the style you are using is right for your readers.

When an editor is working on the details with you – usually called "copy editing" – that's about grammar, spelling, typos, and consistency.

Evaluating for success

You, your colleagues, and your editors can all help. But none of you are your readers.

The real issue in communicating is whether your readers can find what they need, understand what they find, and act appropriately on that understanding in the time and effort they are willing to spend.

Plain language – communicating clearly – cannot be measured by a number (for example: a school grade level or a number from a readability formula).

Because we define clear communication as successful communication, we can only judge a communication by whether it achieves our purpose. And it can only achieve our purpose if our readers can successfully find, understand, and act.

Two ways to do reader-focused evaluations are to evaluate as if you were the reader and to evaluate with readers.

Evaluating as if you were the reader – through personas and scenarios.
Having representative readers work with your draft communication is the best way to evaluate. Before you do that, however, you can use a reader-focused technique by yourself or with colleagues at your desk.

It's called persona-based, scenario-based evaluation.

Be that "reader on your shoulder" – your persona. Read your persona's description and quote. Become the persona.

Think about how the persona would get or get to your communication. What's in the persona's mind when they first look at your communication? What do they do first?

How much would they read? What would the persona be thinking then? What question would they have?

Continue through the persona's experience. Does it make you want to change your draft?

Evaluating with readers – usability testing. Although a persona-based, scenario-based evaluation is likely to get you closer to the reader's experience than just doing a typical read-through and edit, you are not really the persona. You are not your typical reader.

What you have at the end of a persona-based, scenario-based evaluation are hypotheses – predictions – about what will happen when the people you are communicating with get your communication.

To really know how successful a communication is you must have representative readers try it out. That's usability testing.

Research shows that you don't need many people to test a communication. If your document has problems you need to fix, you will often see those problem by watching and listening to 3 to 6 representative readers.

Moreover, if you follow the process in the diagram back near the beginning of this article, you'll evaluate with readers more than once.

Evaluating with a few readers early and often is better than waiting until you have a final draft and then involving many readers.

Note that the process includes evaluating an existing communication before you draft a new one. Testing the old communication with a few readers may not only confirm your suspicions about what you need to do to improve it. It may bring you surprises that you hadn't thought about.

Note that the process includes recursive arrows to show that you may need to cycle through evaluating – revising – evaluating a few times. Of course, at some point, you must finish and publish. But successful communication usually takes several drafts. Evaluating with a few readers between drafts – and revising based on what you learn – is the best way to communicate successfully.

For more on evaluating, especially the techniques of persona-based, scenario-based evaluation and usability testing, see the following section: For more information.

For more information

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