



TOOLKIT for Making Written Material Clear  
and Effective

SECTION 3: Methods for testing written material  
with readers

## PART 6

How to collect and use feedback  
from readers

### Chapter 7

Which feedback methods work best for  
which purposes?

U.S. Department of Health and Human Services  
Centers for Medicare & Medicaid Services



# TOOLKIT Part 6, Chapter 7

## Which feedback methods work best for which purposes?

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This document is the seventh of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

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## Introduction

Back in Chapter 3, we introduced the four methods of getting feedback from readers (ask questions, have the reader think aloud, give the reader a task, observe the reader’s behavior). Now in this chapter, we compare the four methods and discuss which ones are best for getting which types of feedback. The discussion in this chapter will help you decide which methods to use for each of the feedback issues you want to address in your sessions with readers.

In this chapter, we emphasize using interviews to get feedback, because you can make full use of all four methods if you do individual interviews. If you use groups to collect feedback, you will need to rely mainly on asking questions; the three other methods require the privacy and flexibility of working with readers one at a time.



## Using a method as a “main” or “secondary” method

### ***What is a “main method”?***

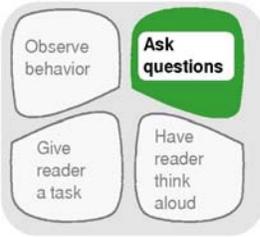
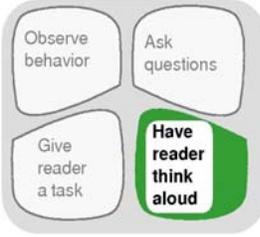
When you are getting readers’ reactions to a particular feedback issue, you will be using one of the four methods as your primary way of getting their reactions. We call this your “main method” for getting feedback on that issue. Depending on the material and type of feedback you seek, it may work well to use one method as your main method throughout the interview. For example, you may decide to use “ask questions” as your main method for the entire interview. Other times, it may work better to use a different main method for different parts of the interview. For example, you may want to use “think aloud” as your main method for the first part of the interview, then switch to using “give reader a task” as your main method for the rest of the interview.

### ***Which methods are suitable to use as a “main method”?***

Figure 6-7-a below summarizes how you can use each of the four methods in your interviews. As shown in this figure, the four methods are closely connected, and you are likely to be using at least three of them (*ask questions*, *think aloud*, and *observe behavior*) in every feedback interview that you do. Of the four methods, all but *observe behavior* are suitable to use as a main method.

**Figure**

6-7-a. Comparing how the four methods for getting feedback are used in interviews.

| Method of getting feedback from readers   | Are you likely to use this method in every interview you do?   | Does it work well to use this method as the “main method” for getting feedback on an issue?  |
|---|--|--|
|    | <p>Yes – Asking scripted and follow-up questions is a crucial part of every interview. In particular, skillful use of follow-up questions is the key to getting the most meaningful and useful feedback from readers.</p>    | <p>Yes – Asking questions works well as a main method for many feedback purposes.</p>  |
|   | <p>Yes – You want participants to feel welcome to speak up any time if they have a comment. At a minimum, the instructions you give at the beginning of the interview should encourage the reader to think aloud.</p>        | <p>Yes – but it may not work well for some readers. Readers differ in how much they say during <i>think aloud</i>.</p>               |
|  | <p>No – While you probably won’t include tasks for the reader to perform in all of your interviews, this method is a powerful tool for checking on whether the material can be used as intended. So try to use it often.</p> | <p>Yes – In particular, it works well as a main method for checking on navigation issues and usability.</p>                          |
|  | <p>Yes – In every interview, you will want to watch what the reader does with the material and pay attention to facial expressions and other body language.</p>  | <p>Not by itself – but when you ask readers to think aloud, or you give them a task, you will be relying heavily on observation.</p> |

Source: Created for this Toolkit.

### What is a “secondary” method?

The four methods of getting feedback from readers are closely connected, and you will be using them in combination. Whenever you are using one of the methods as your “main” method, you will also be using at least two of the other methods as your “secondary” methods. Figure 6-7-b below explains how this works.

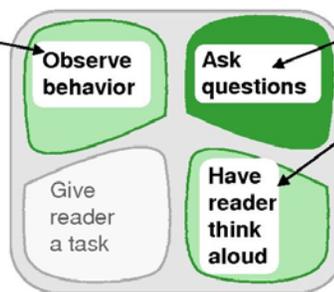
Figure

6-7-b. Whenever you are using one method as your *main* method, you will also be using some of the other methods as your *secondary* methods.

When your main method is **ask questions**, you use other methods, too:

#### A secondary method

When you're asking questions, you will also be watching what the reader does with the material and paying attention to non-verbal behavior.



#### Main method

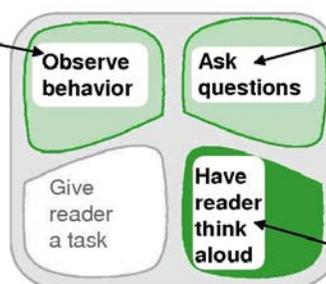
#### A secondary method

When you're asking questions, you still want the reader to feel free to “think aloud” by sharing spontaneous comments.

When your main method is **think aloud**, you use other methods, too:

#### A secondary method

While you're listening to the comments a reader makes during *think aloud*, you will also be watching what the reader does with the material and paying attention to non-verbal behavior.



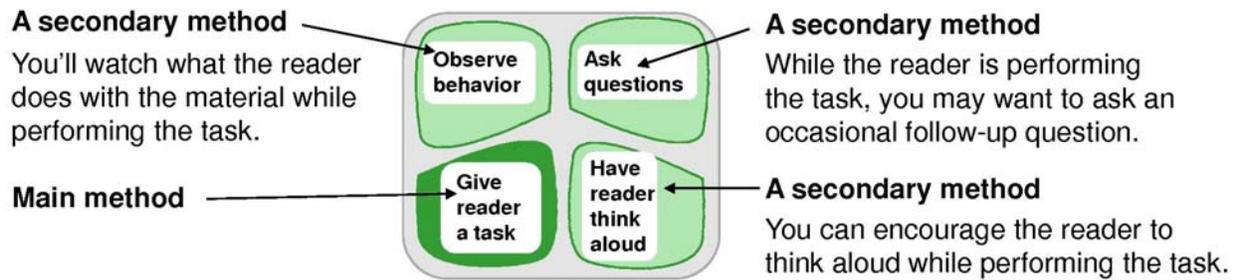
#### A secondary method

While you're listening to comments a reader makes during *think aloud*, you may want to ask an occasional follow-up question to clarify or get the reader to say more.

#### Main method

Figure 6-7-b, continued.

When your main method is **give reader a task**, you use other methods, too:



Source: Created for this Toolkit.



## Which methods work best for which purposes?

When you are trying to decide which method to use to get readers' reactions to each of your feedback issues, it helps to have a sense of which methods work best as a main method for which purposes. The summary table in Figure 6-7-c below will help. It outlines the advantages, limitations, and best uses for each of the three methods you can use as a main method.

**Figure**

6-7-c. What are the advantages, limitations, and recommended uses for each main method?



**Advantages** when used as main method:

- You can address all of your feedback issues, including those that might not come up spontaneously if you were using *think aloud* or *give a task* as your main method.
- You can be systematic about covering the same issues with every reader and asking your questions in the same way.
- If you divide the material into sections and ask questions one section at a time, this allows you to:
  - Collect feedback on each section immediately, while reactions and opinions are still fresh in the reader's mind.
  - Get responses that are not influenced by what the reader will see later on in the material.
  - Ask a series of follow-up questions without interrupting the reader's natural progress through the material.

**Possible drawbacks** to consider

- By focusing on asking questions about specific feedback issues you have identified in advance, you may tend to steer the readers in a particular direction. If so, readers might be influenced to give a more narrow range of reactions or to give the kinds of answers they think you are expecting or wanting.
- The usefulness of the feedback you get will depend a lot on the care you take in writing and asking the questions, including how you handle asking follow-up questions.

Figure 6-7-c, continued.

**Works well** as a main method for these purposes:

- Asking questions is a good way to find out how well the reader understands the material or to get reactions to specific content. For example, you can ask the person to read part of the material, and then say in their own words what it's about or what they think it's telling them.
- You can ask questions to check on whether the purpose and intended audience of the material is clear to the reader, and to get reactions to your ideas for content, key messages, or design.
- When you have identified a problem, you can ask questions to get in-depth feedback to help you understand what's not working and get ideas on how to fix it.
- When you have different versions of the material, you can ask readers for their reactions and preferences.



when used as a main method

**Advantages** when used as main method:

- Using *think aloud* as a main method gives readers the freedom to approach the material on their own terms, without being directed by you to look at or respond to specific parts of it. You will see what draws their interest and attention and you will be able to observe how they move from one part of the material to the next.
- Hearing spontaneous comments from readers may reveal things that you don't anticipate or expect, and would not discover if you relied only on asking the questions you prepared in advance.
- Compared to asking questions, the less-structured approach of *think aloud* may give you a better and more realistic sense of what people are likely to do with the document outside of an interview situation.
- Using this method requires very little preparation.

Figure 6-7-c, continued.

**Possible drawbacks** to consider

- It can be hard to interpret the meaning of behavior you observe while a reader is thinking aloud. For example, when the reader lingers over a particular part of the material, does this indicate interest or confusion? Does a sigh indicate boredom or discouragement?
- When *think aloud* works well, it can be very informative, but some readers never feel comfortable enough to do it. Others forget to do it, and need reminders. People with limited reading skills generally find it hard to read and talk at the same time.
- It's hard to get in-depth feedback when readers are thinking aloud because you need to use follow-up questions sparingly. Asking too many questions will distract readers from their spontaneous progress through the material, and commenting too much on their behavior will make them too self-conscious.

**Works well** as a main method for these purposes:

- Use it when you want to find out which parts of the material tend to draw readers' attention, and which parts they tend to skip. Observing undirected readers and listening to their *think-aloud* comments works well for assessing appeal and personal salience, reactions to the content, effectiveness of layout and other aspects of design
- Use it when you want to check on how well the layout and organization is working for the readers. You can observe how easy it is for readers to find their way through the material and how they use navigational devices such as table of contents, headers and footers, headings, and page numbers.

Figure 6-7-c, continued.



**Advantages** when used as main method:

- Much like *think aloud*, *give a task* gives readers the freedom to approach the material on their own terms, without being directed by you to look at or respond to specific parts of it. Compared to asking questions, it is a less structured approach, and may give you a better and more realistic sense of what people are likely to do with the document outside of an interview situation.
- It's the best way to assess usability of the material. You will be able to observe how readers go about trying to accomplish the task. What they do in performing the task will help you see how hard or easy it is use the material as intended.
- Watching people use the material to perform a task can reveal things that you don't anticipate or expect, and would not discover if you relied only on asking the questions you prepared in advance.
- The method is very flexible. Tasks can be large and general (such as, read this booklet and then fill out the application form) or they can be small and specific (such as, fill in just the top part of this form).
- If the material is not working well and you need to convince others that revisions are needed, the behavioral evidence you collect using this method can be particularly compelling.

**Possible drawbacks** to consider

- It can take some time to prepare the material for use in certain types of tasks. For example it can take time to build appropriate patterns into charts or numeric examples so that there will be right and wrong answers for the task you will be asking readers to perform (for more about this, see Chapter 9, *Tips for collecting particular types of feedback from readers*).
- For some materials, such as forms to fill out and materials that help people make decisions, it is easy to devise a task for readers to perform. But for some materials, devising a task is more challenging.

Figure 6-7-c, continued.

- Often, this method works best in the final stage of developing the material. In earlier stages, when parts of the material are still in progress, it may be hard to devise tasks for readers to perform.
- It can be hard to interpret the meaning of behaviors you observe while a reader is working on a task. For example, if the reader flips back and forth through the material, does this indicate confusion, or the search for a shortcut, or a need to double-check something, or what?
- Interviewers need to be able to put readers at ease about doing the task, so that they don't feel like they are being tested or judged by how quickly or how well they perform the task.

**Works well** as a main method for these purposes:

- *Give a task* is a powerful method for “usability testing.” Giving the reader a task to perform that requires using the material in some way shows you whether readers are able to use the material – unassisted – for its intended purpose. Besides checking on whether readers can perform the task correctly and easily, you will be able to observe what they actually do with the material to try to accomplish the task. Watching their behavior can help you determine how well the layout and organization is working for the reader and how clearly important concepts and instructions are explained. It may also reveal problems with the material that you would never discover by just asking questions or asking readers to think aloud.
- For checking on comprehension and ease of use, especially for parts of the material that include numbers, diagrams, tables, or comparison charts. You can set up tasks for which there are right and wrong answers that you have built right into the material. For example, you can create a specific pattern of results in a comparison chart, and then ask the reader to use the chart in a way that requires making certain types of comparisons for which there are right and wrong answers.



Source: Compiled and summarized for this Toolkit, drawing from the writer's field experience, the experiences and suggestions of colleagues, and the literature on cognitive interviewing and usability testing.

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