Designing for Optimal Communication

Create the blueprint to separate you Good documents with the Bad & Ugly

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Today's transactional document is being leveraged as the most valuable and cost-effective means of communication with your customers. Thus, the document's design can break or make the relationship between the organization and its customers. Intelligently strategizing the production of the transactional document will determine its optimal output.

Sidebar: Case Study 1
A letter and form for returning goods to Littlewoods Stores had to address the problem of a driver waiting while this letter was found to accompany the item that was to be returned. This company wasted an incredible 14% of its time in this manner. The re-designed document was simple and clearly separated the text from the tabular section. It had an additional line, highlighted in red, which read, "Please show this letter to the driver who calls." The time wasted was reduced to less than three percent, and the drivers were 10% more productive, saving the company approximately $1,000,000 per annum.

Case Study 2
An application form for a pension was shown to take 52 minutes to complete and had a 45% error rate until the following instruction was added on page one. "Before you start, it may be useful to have your National Insurance number, proof of age and marital status and your bank details on hand," thus, obviating the interruptions in completing the form and eliminating an increased chance of mistake. The time to complete the form came down to less than 35 minutes, and errors reduced to 29%.

There are three kinds of transactional documents — the Good, the Bad and the Ugly. Conducting a comprehensive study in the quality of statements in North America and Europe, we have encountered all three. And it is no coincidence that the Good statements tend to belong to well-respected organizations, whilst the Bad tend to come from organizations that have less than stellar reputations, and the Ugly tend to be either from regulated monopolies or by once-famous organizations now under the control of cost accountants. How would you describe your organization's statement? Where do you fit on the spectrum?

What the companies, who produce Good documents, understand is that no matter how accurate or complete the information in a document is, the reader will dismiss it if it is impenetrable, contains as many fonts as a ransom note or if the type is too small or too large to read — in short, it is Ugly, and people have better things to do than decipher such a document. These organizations also understand that Bad statements display a clean image, are uncluttered and might appear attractive, but with key information missing, sequence awry and the what-to-do-next hidden, readers will struggle with this form, may resort to expensive dialog with customer service, probably make mistakes and generally wish they had chosen another product.

So, it falls to the Good to get it right — the correct information in the right order, important messages highlighted, is easy to read and remains uncluttered. Organizations need to understand how their documents can become Bad or Ugly as well as look at the design issues that come into play in creating good documents to save themselves from making these critical design errors.

The Good
There are over 100 million statements / invoices / schedules sent each year in North America as well as in Europe. Of these, according to a recent Pitney Bowes study, three quarters are opened and reviewed for an average

duration of 42 seconds. While there is a greater propensity among your customers to do business if the statement is positively perceived by brand or importance, the corollary is also true, and a significant percentage of these documents don't even rate a cursory glance before being consigned to the wastepaper bin. Good documents, however, drive business in a number of ways: they are understood, quickly and effortlessly, get quicker responses, including payment, cause fewer inquires and promote that most elusive quality of being easy to do business with. They are, in essence, the cornerstone of most serious branding programs.

The Opportunity

Thus, design is an important aspect of creating a Good document, but only if as much attention is paid to the content as well. It is the combination of the two that results in spectacular output.

Contact information: Ensure that contact details are clearly indicated. Position them in their own section on the page and distinguish between general customer service and specific contacts, if necessary. Keep corporate addresses well hidden if you don't want your customers to call. Remember, make it easy to contact the right number, the first time.

Key information: Any key information should be highlighted so that it stands out from the rest of the text or numbers. This can apply to dates for payment, amounts, call numbers, advantages of responding and even the consequences of not responding. The typographer has plenty of devices at his or her disposal — emboldening, italicizing, increasing font size, decreasing font size (it works — really!), white space and, of course, color.

Sequence: This is a much-neglected aspect of information design, but we all know the frustration of its consequences. For example, after struggling with the programming instruction for a video-recorder, you turn the page to read, "Ensure that the TV is set to standby before you start" or you grapple with an application form only to learn from the footnote that you are somehow not eligible for this service. Get the information in the right sequence; otherwise, you will annoy those who have to follow it. They will make mistakes, liabilities will be tested and there will be no repeat business.

Educational messages: Take a little time to explain to the readers what certain terms mean, or what various options are open to them, or what to do next. It saves time, improves the customer service and pre-empts calls, which can cost you as much as $25 a call.

Focused messages: If possible, address the customer using personalization. Don't simply rely on the salutation (Dear Mrs. X, Mr. Y or Dr. Z). Although that's a start, get a notion of who they are. A couple in Orlando are unlikely to be thrilled by a promotion for a show in Miami but would possibly be interested in a new pool cleaner. And a single woman, aged 23, living in New York is more likely to be interested in a Caribbean holiday than plans to invest in her retirement fund. Target by age, ethnicity, marital status and geography for a more focused message, and you will get a more focused response.

Corporate identity: There is no reason why the elements of a corporate identity, which undoubtedly costs millions of dollars to establish in stationery, brochures and advertising, cannot be incorporated is a company's statements and invoices, which will be seen by many more customers. Don't be satisfied with just Arial or Times New Roman (a font which incidentally was designed in 1932 for low-grade letterpress printing on course newsprint). If the corporate font is Eras, get a copy for the production printers. If the font is really obscure and does not exist in any other format than the desktop, you can rue the day that your Brand Consultancy came up with that suggestion while you consider the cost of having that font cut for your printers. But above all, apply the same rigors to your variable data documents as you do to the offset material so that the output will look inviting.

Dissecting the statement: We are currently in the process of identifying the components and attributes of Good statements. To date, we have identified over 100 differentiators to be found within the wide range of statements we are examining. Although each attribute seems trivial in isolation, the Good statements seem to have most or all of them and tend to exploit them well.

The Problems
As noted previously, design is an important aspect of creating a Good document, but poor design is just one consequence of the root cause of Bad or Ugly documents — namely, ownership.

Ownership: The problem in most organizations is there is no one person with the responsibility for content, design and production or for form and function. The individuals in an organization with the responsibility for improving a document tend to work for marketing / brand / customer service and, as such, have no say with the IT department who, in turn, has responsibility for the production of the document. The corporate strategy may determine the look and feel of offset material, such as with brochures and annual reports, but the IT strategy determines the content and print out of transactional documents. Statements, schedules and invoices are seen by many companies as no more than computer printouts to be posted on time and in the right envelopes.

Marketing: The marketing department doesn't know about variable data printing for a variety of reasons:

- They didn't know that the statements or invoices could look any different.
- The production of the document all happens on a different floor or even a different building to them.
- They are too busy making advertisements.
- Transactional documents aren't sexy enough.
- Trying to understand IT is tough — it easier just to let them get on with it.
- Marketing agencies are even less aware of variable data printing.
- They are discouraged by the sharp intake of breath when anyone suggests making an improvement to transactional documents — it would be too costly, and it could take too long.

Legacy systems: To a certain extent, the last observation concerning cost is valid where legacy systems are concerned. Aged databases and old formatting software constitute a formidable barrier to improving statements, and it is a finance department's call as to whether it is worthwhile to change when all things are considered. A different situation exists where there is no document composition installed. Here we are starting with a blank sheet of paper as it were, and the question is not whether to install it, but rather, which one do we get?

The Solution
Clearly, the answer is to get all those concerned together, and discuss where you want to be and how you are going to get there. Unfortunately, the experience to achieve this rarely resides in any one person in an organization; otherwise, transactional documents wouldn't look the way they do.

External expertise: With as diverse a set of players as it takes to manage document production strategies, it is often worth considering the use of an external body to manage the design of transactional documents. The order of events to be unfurled looks something like this:

- Assemble all the players in one room — marketing, brand, customer service, IT, printing, product development, finance, procurement, regulatory affairs, lawyers, administration, corporate affairs and so on.
- Show what could be done to their transactional documents to improve them.
- Make the business case for improvement, not just nicer-looking documents.
- Demonstrate the process.
- Emphasize the role of delivering the documents to the IT staff.
- Emphasize the role of ownership to the marketing staff.
- Stress the need to work together as a team.
- Ensure that the project has sponsorship at a sufficiently high and broad level.
- Find and appoint a strong project manager.

Then, start with the contents of the documents to be re-designed. Take the current contents and question their validity while allowing for the inclusion of new marketing messages. Only when the contents have been agreed on, with compromises, if necessary, can an organization start to work on the design of its transactional document.

Pilot at a mail services provider: The best way to introduce Good statements into an organization is in conjunction with a new product launch. Senior marketing management will usually be very receptive to anything that provides a better “customer experience,” i.e., increases customer satisfaction ratings. However, developing, quality testing and promoting a new statement into production within a 90-day window is usually fought by IT, especially when the initial volumes may be low. In fact, many organizations have found that the quickest way to get a newly designed statement to market (especially for a new product) is to move its production to an external mail service provider. It is likely that a top-notch MSP will have invested in the latest composition software, production (multi-color) printers and fully automated inserting systems. This maximizes flexibility in design and production. The lack of such technologies tends to be the stumbling-blocks to quickly deploying a best-of-breed statement internally.

In summary, your statements are the most constant reminders that existing clients have of their relationship with you (likely the people that will provide 80% of next year’s revenue and profits). These documents, in fact, will receive more attention than any of the slick brochures, classy ads or TV spots produced by your marketing department’s ad agency. Therefore, it makes sense to do what the industry leaders do; make them a proud representative of your business.

Editor’s Note: The authors of this article are currently working on a commissioned study of the componentry of client statements. They are examining a broad range of representative samples from different industries and regions of North America. In what some industry pundits have nick-named the “statement mail genome project,” the authors expect to isolate and quantify the value of up to 200 key statement attributes. The intent of the project is to identify which components (or lack of) drive what behaviors within the consumer. From this, information designers will be able to maximize the “Goodness” with a customer statement.

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