

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 them.
- 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 your sponsoring executive, your attorney, IT person and designer -- can be consulted as necessary.

Agency Insight

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.

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 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.

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