Reducing sludge in forms
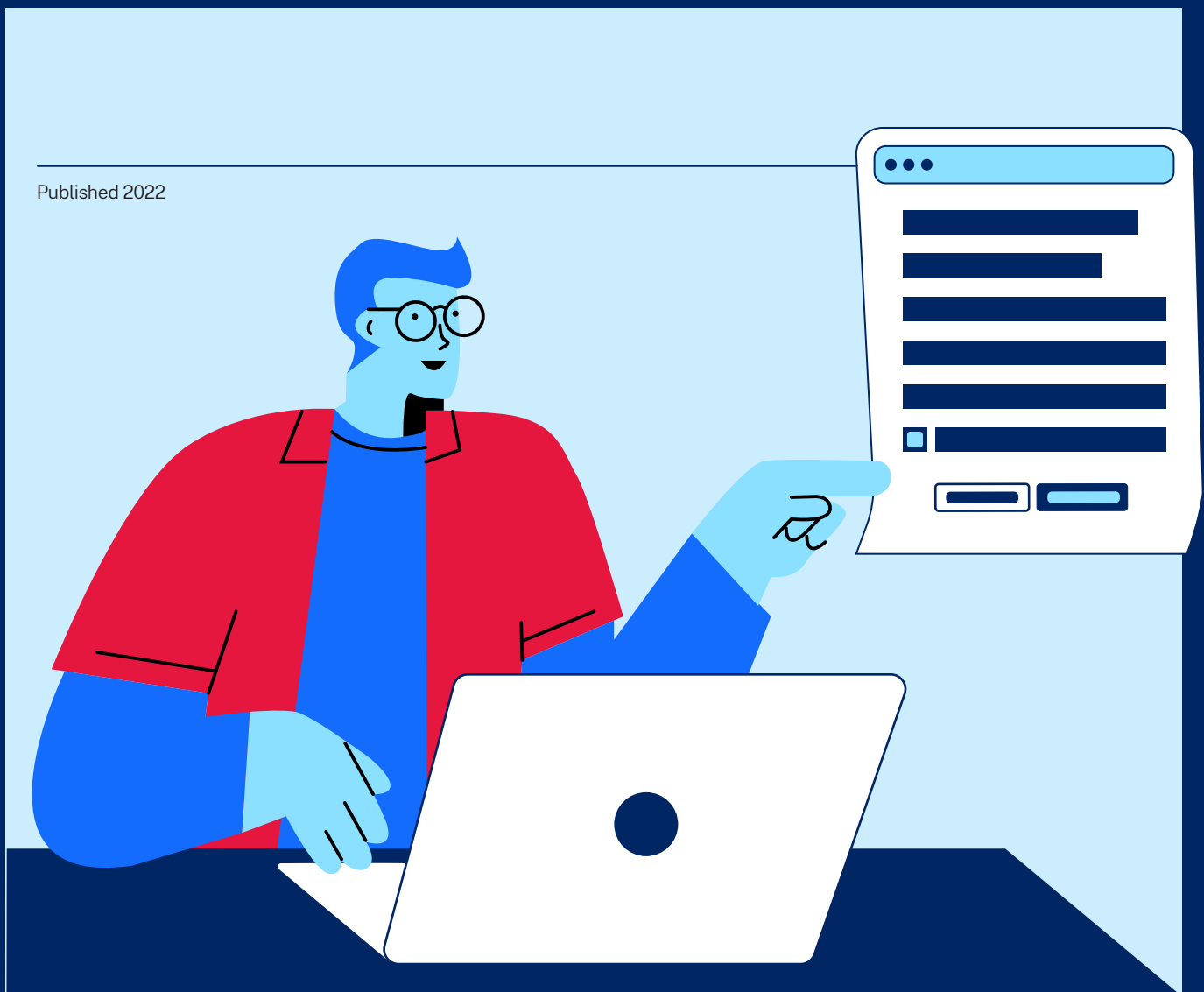
Published 2022

Behavioural Insights in Action

Reducing sludge in forms

Published 2022

Contents

Reducing sludge in forms

Forms are used by government to help customers get what they need, from licenses, to complex enquiries or building approvals.

We want our forms to be as efficient and as easy as possible. Forms should help our customers access services, not stand in the way as a barrier. Our forms must be easy to find, easy to understand, easy to complete, and easy to submit.

Unnecessary friction ("sludge") in forms is bad for our customers. Sludge increases the time customers must spend completing the form and increases the odds of customer error. Sludge in forms reduces response rates and creates a bad customer experience.

This guide will help you improve the way you write and design forms. The guide will introduce and provide examples of tools and techniques to reduce sludge. These tools are based on evidence from behavioural science.

Where to begin

There are four key elements to think about when identifying and reducing sludge from forms.

What do we mean by 'forms'?

When we talk about forms, we mean: any document or page (physical or online) which asks customers to enter information and respond to questions to access something.

Examples include online application forms, physical forms at service centres, forms issued after inspections and more.

1. Access and readiness

- Can customers easily find the right form?
- Do customers know how and why to complete the form?

2. Design and structure

- Is the structure easy to navigate?
- Do customers have to 'tell us once'?
- Does the most important information stand out?
- Are customers alerted to any errors while completing the form?

3. Language and content

- Does the customer have to fill in only the most necessary information?
- Is the language easy to understand?

4. Next steps

- Is it clear how the customer should submit the form?
- Does the customer know what will happen after they submit their form and how long it will take?

Reducing sludge in forms

Quick reference guide

1. Access and readiness

✓ **Do you understand your audience and your purpose?**

Clarify your purpose

- Ask yourself what the purpose of the form is
- Determine who your customers are

✓ **Is the form easy to find?**

Make forms easy to find

- Minimise the number of clicks required to navigate to the form
- Use a clear title that clearly indicates the form's purpose and audience

✓ **Is the purpose clear to the customer?**

Clearly explain the form's purpose and provide an easy eligibility tracker

- Clearly explain what customers achieve by completing the form
- Use a decision tree to guide customers to the right form

✓ **Do customers know what they need to complete the form?**

Explain to customers what they need to complete the form

- Make sure the time estimate is realistic for the average customer
- Give clear step-by-step instructions
- Use a checklist of required documents and necessary actions

2. Design and structure

Is the structure easy to for your customers to follow?

Use clear design and formatting

- Break sections up into shorter, comprehensible "chunks"
- Logically layout your questions in a way that makes sense to your customers

Is the relevant information easy to access?

Make it easy for users to easily access information as they complete the form

- Only provide essential information
- Provide logical and searchable information to help your customer's complete the form
- Use bullets/lists to break up information

Does the most important information stand out?

Use colour, font size, and visual elements to make important parts of the form salient

- Use formatting to highlight key information for questions
- Use visual elements to make forms easier to understand
- Use size and shading to indicate expected responses

[For digital forms] Is it an efficient and easy interactive experience?

Use digital features to make your form easier to use and more efficient

- Pre-fill forms with as much information as possible
- Default customers into the preferred option
- Reduce mistakes by using positive error messages
- Use digital validation to reduce errors
- Use buttons and menus to help customers navigate the form
- Use a progress indicator to motivate customers by showing how far they've come
- Save customers' progress

3. Language and content

✓ **Are the questions easy for customers to respond to?**

Make it easy for customers to answer your questions

- Ask concise questions
- Eliminate redundant questions
- Ask closed questions rather than open-ended questions
- Focus on one concept at a time
- Questions should be self-contained and self-explanatory
- Provide example responses in italics

✓ **Is the language easy to understand?**

Use plain language and simple sentences to make your form easier to understand

- Replace jargon and legal terms with easy-to-understand alternatives
- Use consistent terminology throughout the form

✓ **Is the form personalised?**

Use first and second person pronouns to make customers feel like the form is addressed to them, which builds engagement.

- Use first and second person pronouns to increase engagement

✓ **Is the form easy to understand?**

Check your form for redundant or confusing content

- Test your form with users to detect superfluous or confusing content

4. Next steps

✓ **Is it easy to submit the form?**

**Make it as easy as possible to submit the form**

- Allow both online and paper submission of forms where possible
- Allow form completion and submission in as many file formats as possible

✓ **Is it clear what happens next?**

Tell customers what will happen next and how long it will take

- Confirm that customers have successfully submitted their form
- Tell customers how long they will have to wait and providing frequent updates
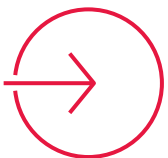
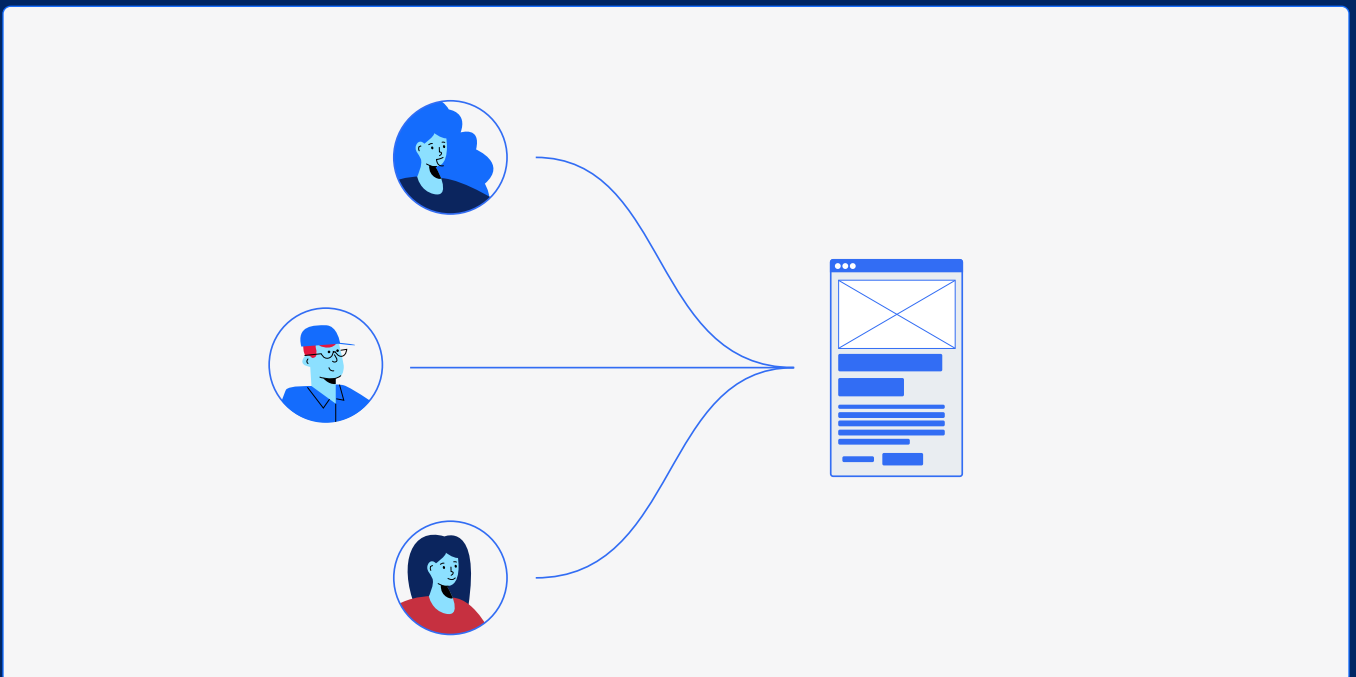# 1. Access and readiness

In this section

[Clarify your purpose](#)

[Make forms easy to find](#)

[Clearly explain the form's purpose to your customers](#)

[Explain what customers need in order to complete the form](#)

Clarify your purpose
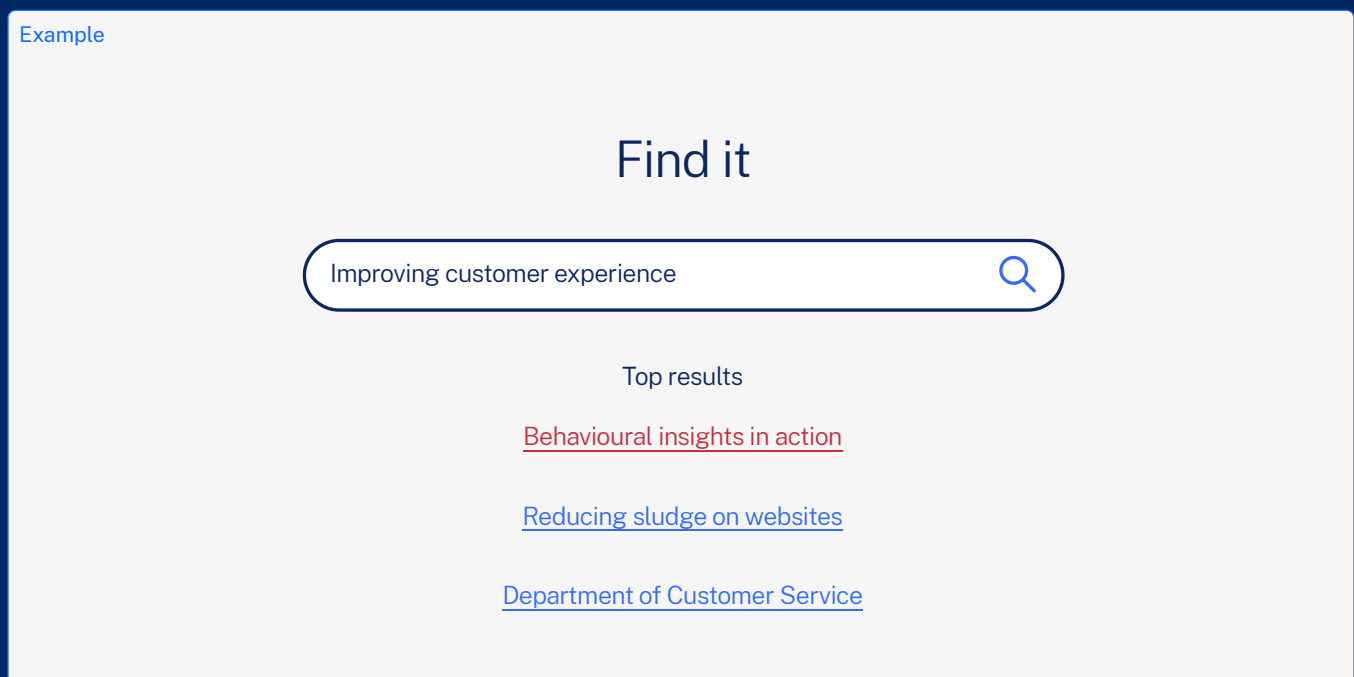

Consider your customers' needs

Forms must be designed with the diverse needs and experiences of customer in mind. Form designers must have empathy for the situation and experience of the form user.

Consider that your form will likely be used by people with limited literacy, people who experience difficulties with information technology, people who are time poor and people who are stressed.

By keeping in mind these possibilities, you can make sure you design a form which is most suited for your customers' needs.

Remember – there's no downside to making your form as easy to use, as readable, and as simple as possible.

Make forms easy to find

Example

Find it

| Improving customer experience | 🔍 |

Top results

Behavioural insights in action

Reducing sludge on websites

Department of Customer Service

Physical forms which customers are expected to locate (for example, in a service centre) should be clearly labelled. Customers should know what the form they have picked up is for and why they have it.
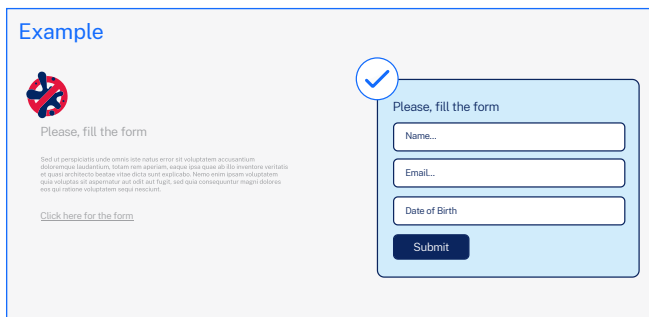
Online forms should be placed prominently on the relevant government website, and easily located via web searching (i.e., you should be able to find the form within one or two clicks from a simple Google search using keywords – few customers will know the full name of the form off the top of their head).

Customers should not have to spend a long time searching for a form, or worse, waste time using the wrong one.

Even finding the right webpage may not be enough if there are many forms linked there and no easy way for your customer to know which to click – for more guidance on good information architecture you can read our website guide.

How do I do this?

Minimise the number of clicks required to navigate to the form.

Example

Please, fill the form

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

Click here for the form

Please, fill the form
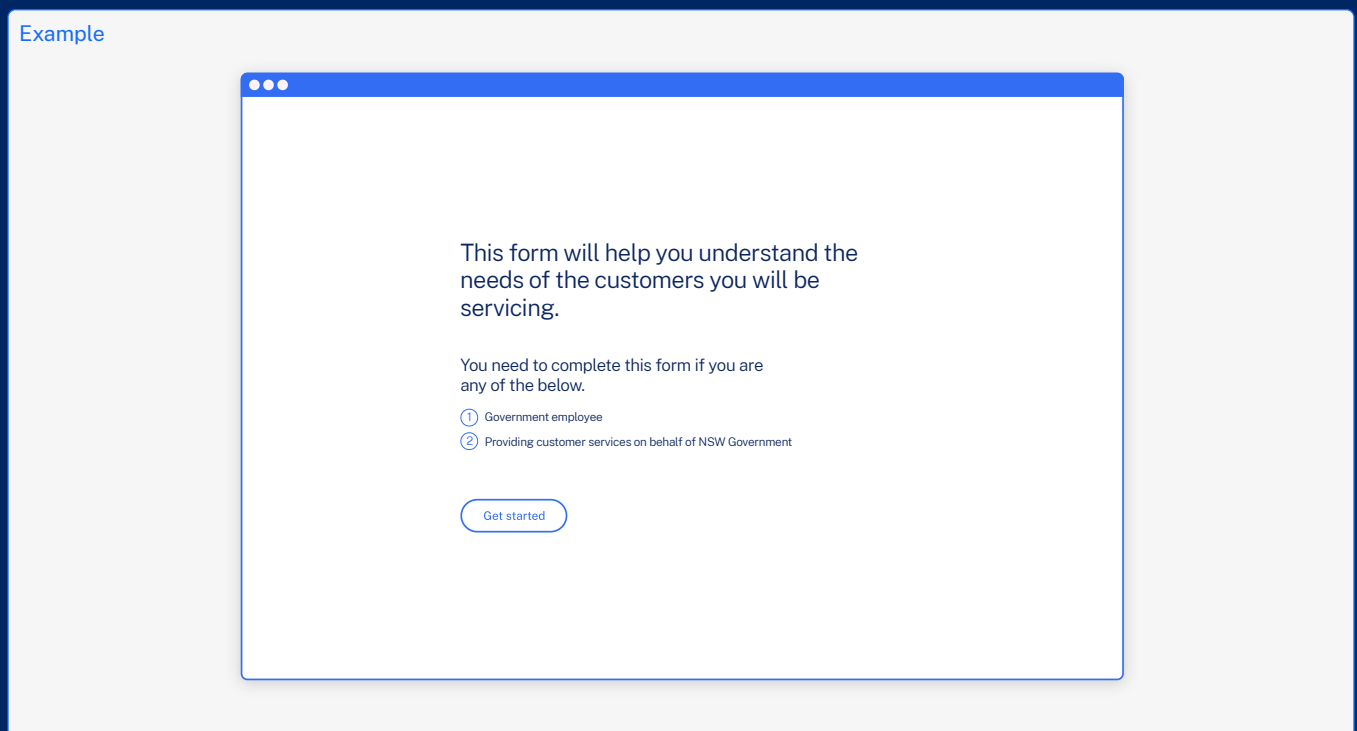
Name...

Email...

Date of Birth

Submit

Send customers to the form with a direct hyperlink. Place the hyperlink in emails, or on webpages related to the form, or pages that target customers are likely to visit. For example, a letter from the UK tax authority that sent taxpayers directly to the required form, rather than to a webpage that linked to the form, increased form completion rates from 19% to 23%.[1]

Use a simple title that clearly indicates the form's purpose and audience.

Example

Employment form

First name		Last name
Adress		
Date of Birth		Email

Submit
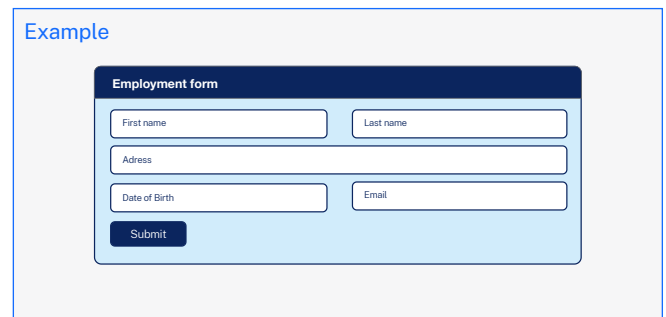
This will help customers find the form and minimise uncertainty over whether the form is the one they are searching for. Having a clear title is particularly important if there are multiple versions of a form for customers with different needs or characteristics. For example, Service NSW clearly labels the different forms required for the Family, Low-Income Household, and Life Support Energy rebates for retail customers.
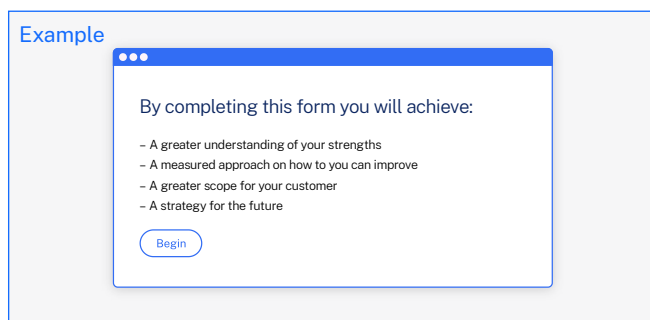
→ 1. Access and navigation

Example

This form will help you understand the needs of the customers you will be servicing.

You need to complete this form if you are any of the below.

① Government employee
② Providing customer services on behalf of NSW Government

Get started

Customer's may not always know exactly which form they have to fill out or why – they may know they have to find a form on a certain topic but be unclear as to the details. By explaining the purpose of the form – what customers get out of it – and helping customers check if it's the right form for their needs you can save your customers time and reduce sludge.

How do I do this?

Clearly explain what customers achieve by completing the form.

Example

By completing this form you will achieve:

– A greater understanding of your strengths
– A measured approach on how to you can improve
– A greater scope for your customer
– A strategy for the future

Begin

For example, one study found that explaining the process of disclosing personal information to an employer and how it would benefit the employee increased fully completed employee disclosure forms from 55% to 85%.[2]
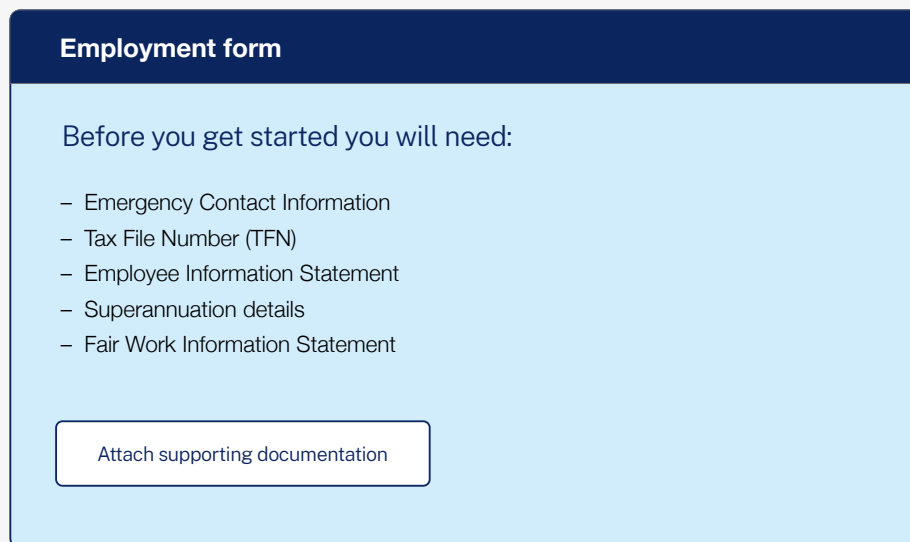
Use a decision tree to guide customers to the right form.

Example

Do you employ five or more staff

No   Yes
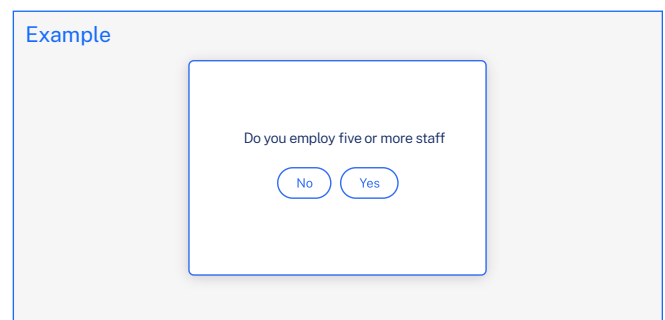
You can use a series of questions to take customers through to the right form for them. Customers might have to click on some simple answers to questions about their occupation, what they are looking for and so on, then be guided to the form that meets their needs. This is called a 'decision tree'. Decision trees can be easily implemented digitally and help ensure getting to the right form is easier and more seamless than having to manually search for it.

Explain what customers need in order to complete the form

Example

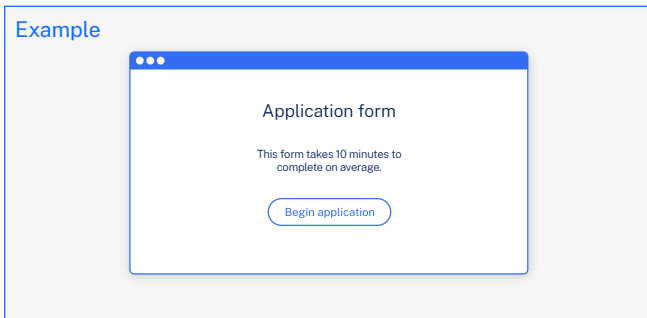**Employment form**

Before you get started you will need:

– Emergency Contact Information
– Tax File Number (TFN)
– Employee Information Statement
– Superannuation details
– Fair Work Information Statement

Attach supporting documentation

Include any personal information, supporting documents, and an estimate of the time required to complete the form. Providing this information up front reduces the psychological costs of completing the form because it allows customers to prepare accordingly.
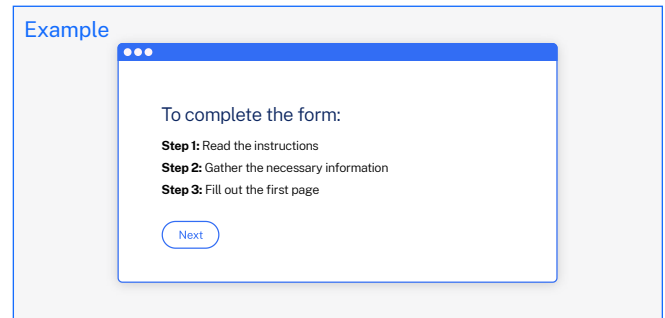
How do I do this?

Make sure the time estimate is realistic for the average customer.

Example

> Application form
>
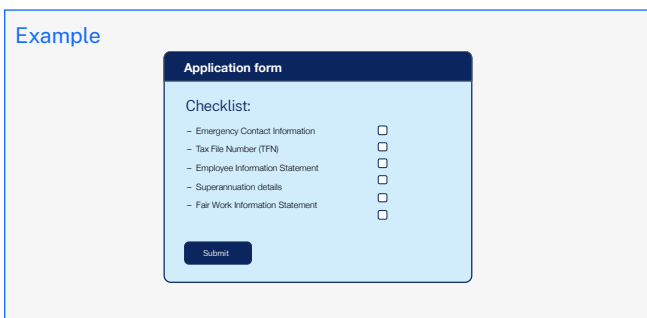> This form takes 10 minutes to complete on average.
>
> Begin application

Always be upfront about how long it takes to complete your form. One study found that customers were almost half as likely to complete a form that took 30 minutes if they were told it would only take them 10 minutes.[3]

Give clear step-by-step instructions.

Example

> To complete the form:
>
> **Step 1:** Read the instructions
> **Step 2:** Gather the necessary information
> **Step 3:** Fill out the first page
>
> Next

We respond best to instructions that are broken down into steps.[4] Tell customers how to complete the form by giving a list of the necessary actions and explaining exactly what documentation (if any) they will need to provide. Start each step with a verb (e.g. Step 1: Read the instructions, Step 2: Gather the necessary information, Step 3: Fill out the first page) and include as few actions per step as possible.

Use a checklist of required documents and necessary actions.

Example

> **Application form**
>
> Checklist:
>
> – Emergency Contact Information ☐
> – Tax File Number (TFN) ☐
> – Employee Information Statement ☐
> – Superannuation details ☐
> – Fair Work Information Statement ☐
> ☐
>
> Submit

Checklists enable customers to take in the requirements at a glance and to keep track of completed actions.
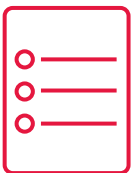
2. Design and structure

In this section
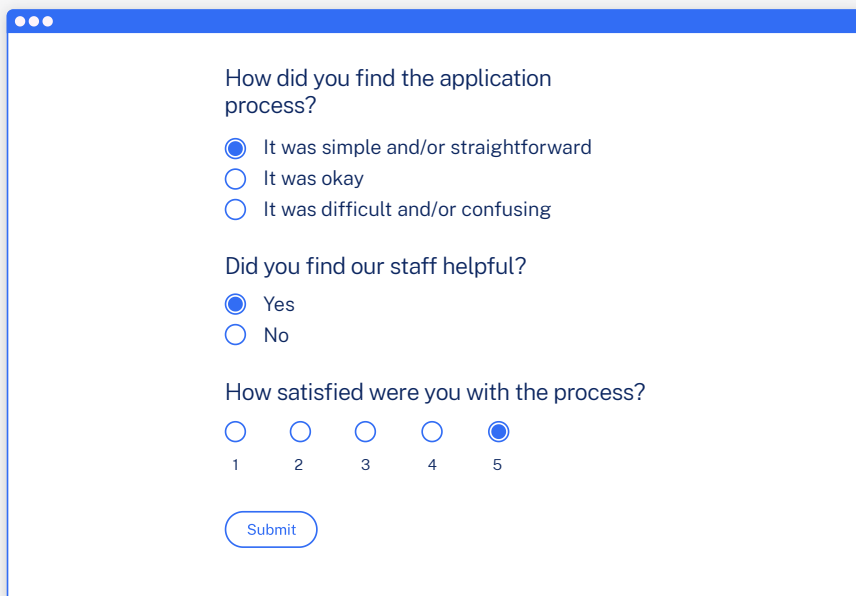
[Use clear design and formatting](#)

[Make it easy for users to access information](#)

[Use visual elements to make important parts of the form salient](#)

[Use digital features to make your form easier to use](#)

Use clear design and formatting

Example

How did you find the application process?

○ It was simple and/or straightforward
○ It was okay
○ It was difficult and/or confusing

Did you find our staff helpful?

○ Yes
○ No

How satisfied were you with the process?

○ ○ ○ ○ ○
1 2 3 4 5

Submit
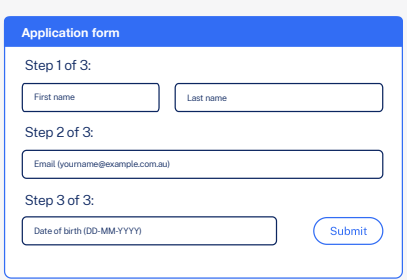
Use clear design and formatting to make your form easy to follow. Customers prefer a form with meaningful subheadings and questions laid out in a way which meets customers' expectations. These small changes can significantly increase engagement and completion rates.[5]

How do I do this?

Break sections up into shorter, comprehensible "chunks".

Example

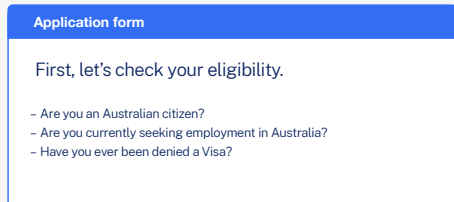| Application form |
| --- |
| Step 1 of 3: |
| First name | Last name |
| Step 2 of 3: |
| Email (yourname@example.com.au) |
| Step 3 of 3: |
| Date of birth (DD-MM-YYYY) | Submit |

Research on how people learn new information finds that chunking information can make perception, learning, and cognition easier.[6] Forms should be as short as possible, with content separated into clear sections.

Order your questions in a way that makes sense to your customers and meets their expectations.
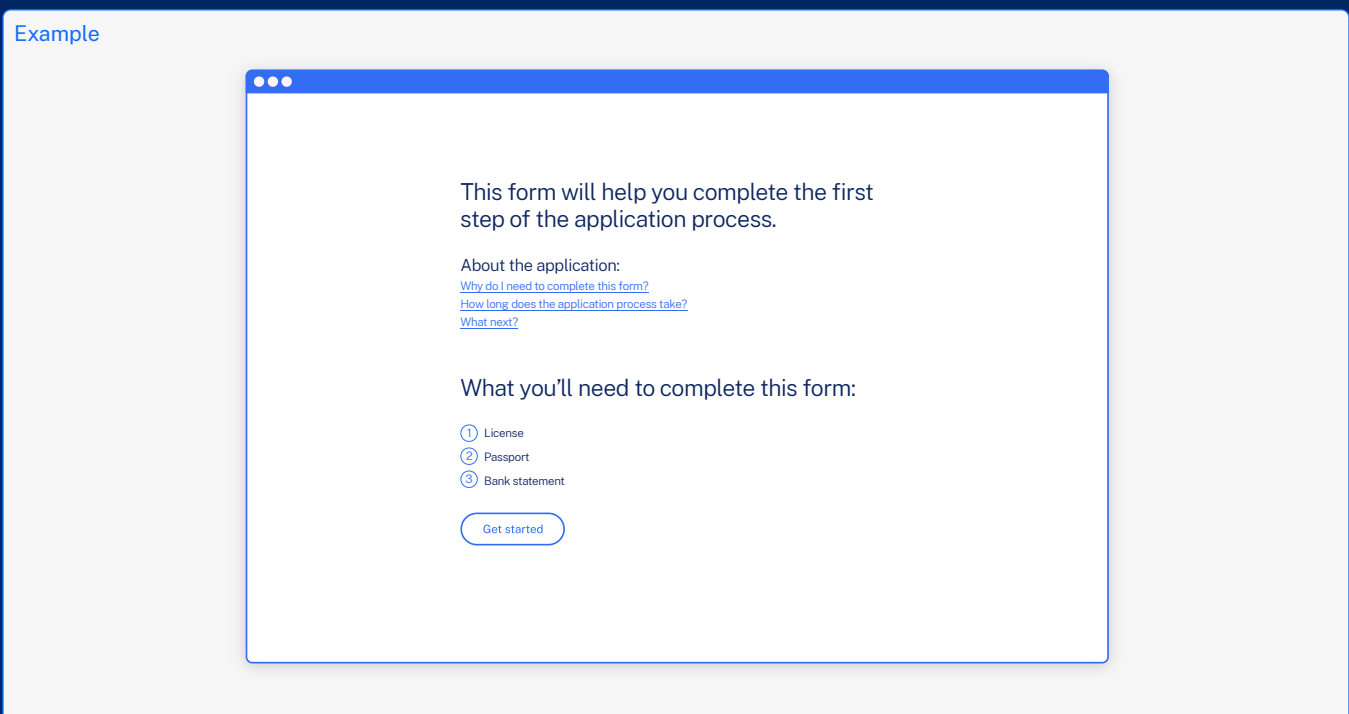
Example

Application form
First, let's check your eligibility.
– Are you an Australian citizen?
– Are you currently seeking employment in Australia?
– Have you ever been denied a Visa?

For example, eligibility questions should be completed first, followed by the most important information, with supplementary or optional information presented last.

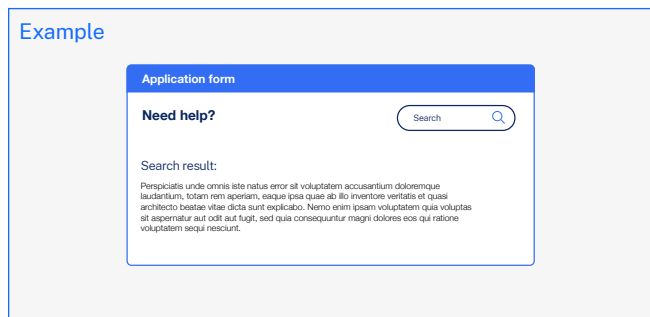# Make it easy for users to access information as they complete the form

Example

This form will help you complete the first step of the application process.

About the application:
Why do I need to complete this form?
How long does the application process take?
What next?

What you'll need to complete this form:

① License
② Passport
③ Bank statement

Get started

Help your customers by reducing the number of times they must look away from the form to find information. Put key information within the form itself (rather than only on a separate web page or physical document). Doing this will help your customers keep track of where they are and make it easier for them to complete the form.

How do I do this?

Provide logical and searchable information to help your customer's complete the form.
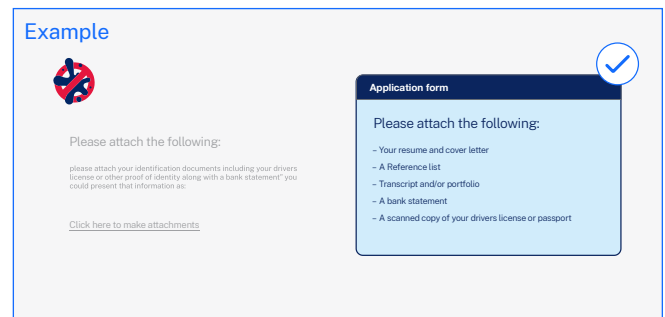

Example

Application form

Need help?

Search

Search result:

Perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

For both online and paper forms it's critical you provide access to well organised and searchable information. For example, information about your form must be easy to find from your website or where your form is stored.

Ensure that the information on the website is accurate and up to date. Ensure that the information is logical and reflects the questions in your form.

For example, if your form is broken up into sections, you may want to identify what information or documentation your customers need to provide is relevant to each section ('section 1 – drivers license, passport, or proof of age card, section 2 – bank statement' and so on).

Use dot points/lists to break up information.

Example

Please attach the following:

please attach your identification documents including your drivers license or other proof of identity along with a bank statement" you could present that information as:

Click here to make attachments

Application form

Please attach the following:

– Your resume and cover letter
– A Reference list
– Transcript and/or portfolio
– A bank statement
– A scanned copy of your drivers license or passport

Services and licenses can have complex eligibility requirements. Customers are often asked to prove their eligibility as part of completing a form which grants access to the service or license.

Make it easy for your customers by presenting information using dot points or checklists. Breaking up information in this way makes it easier for customers to read and take action.

For example, instead of saying "please attach your identification documents including your drivers license or other proof of identity along with a bank statement" you could present that information as:

Please attach:

- A scanned copy of your drivers license, passport, or proof of age card
- A bank statement

Use colour, font size, and visual elements to make important parts of the form salient[7]

Draw the customer's attention to the most important parts of the form with coloured boxes or text, large or bold font, and graphic elements that visually reinforce the text.

How do I do this?

Use visual elements to make forms easier to understand.

Example

Employment form

To access this form and complete:

Gain access to a computer, tablet or smartphone

Login in on the website

Fill out the appropriate information

Submit and wait for response

Icons create a visual language for the customer and increase accessibility.[8] For example, pairing icons with a verbal explanation of key terms increased customer understanding of contractual terms and privacy policies by 34% relative to text-only definitions.[9]

For example, you could include a symbol of a driver's license next to a section asking customers about their license details.

Use size and shading to indicate expected responses.
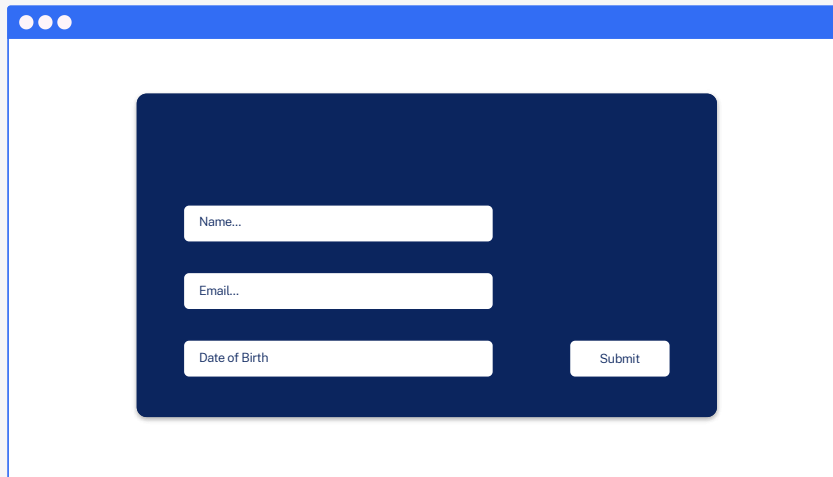
Example

Employment form

First name   Last name

Email

How can we help?

Submit

For example, you can use a larger response box to encourage a longer, more detailed response.[10] Similarly, you can use shaded boxes to indicate a response is not required for that question. Use consistent shadings (like different colours for mandatory responses and optional responses) to help your customers navigate your form.

Use digital features to make your form easier to use and more efficient

Example

Hosting your forms online helps make your forms more accessible to customers. There are host of powerful digital design techniques you can use to make forms easier and faster to complete for our customers.

How do I do this?

Pre-fill forms with as much information as possible.

Example

Employment form

John	Brown
84 Regent St, Paddington, NSW 2021	
18/04/1992	Johnbrown@outlook.com.au

Submit

The more information we can pre-fill, the easier it is for our customers. Filling in parts of a form with information you already have can save the customer time and effort, as well as help them to complete the form accurately.

For example, one study found that tax forms that are correctly auto populated increased the accurate self-reporting of a person's taxable income.[11]

Default customers into the preferred option.

Example

Application form

Send me electronic notifications instead of paper ☑

Submit

Pre-selecting options that benefit customers reduces sludge in forms. Defaults have been shown to nudge people into saving more for retirement,[12] switching into green energy plans,[13] and reducing paper use at a university.[14]

Reduce mistakes by using positive error messages.

Example

Please, fill the form

Invalid submission

Invalid submission

Submit

Please, fill the form

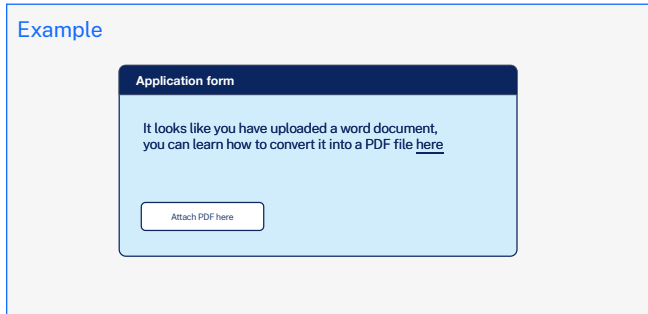yourname@example.com.au

DD-MM-YYYY

Submit

A positive error message identifies where a customer has made an error in completing an online form and suggests a way to resolve the issue. This can help reduce the psychological cost of completing forms.[15] For example, if a customer has entered their email address incorrectly, a positive error message would not only flag the error, but also prompt the customer with "Enter your email address in the format yourname@example.com."

A note on web accessibility and optimisation

All NSW Government web content, including forms, must meet accessibility standards and be optimised for mobile phone users. Talk to your web developer if you have concerns about the accessibility/optimisation of any web content you are working on.

2. Design and structure

Use digital validation and guidance to reduce errors.

Application form

It looks like you have uploaded a word document, you can learn how to convert it into a PDF file here
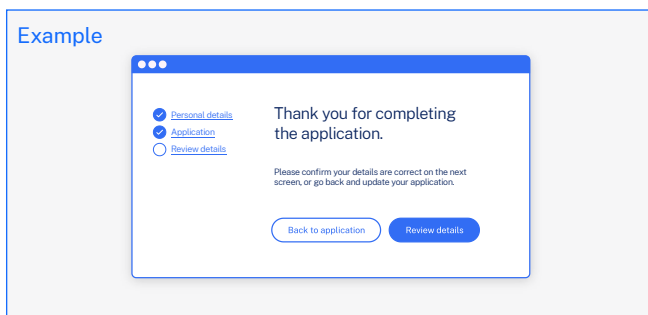
Attach PDF here

Digital validation can help ensure your customers upload the right documents in the correct format. Setting up validation which detects the wrong files (say, a photograph uploaded instead of a scan) helps your customers by letting them know there's an error before they submit the whole form. That way they can easily rectify errors and stay on track.

Uploading files in the correct format can be challenging for customers with limited digital literacy.
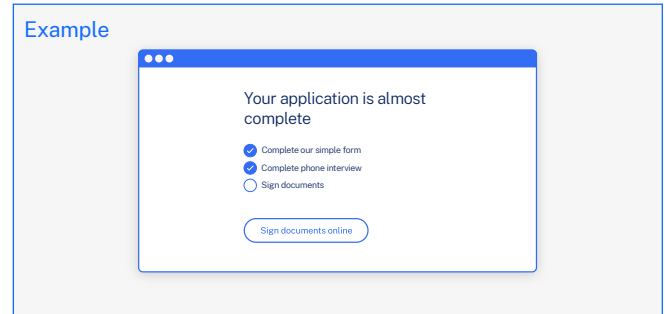
You can help these customers by including help and advice with your digital validation system. For example, if a customer uploads a file in the wrong format, provide advice on how they can upload it in the correct file type. Don't assume your customers will know how to convert a file from one format to another.

Use buttons and menus to help customers navigate the form.

Personal details
Application
Review details

Thank you for completing the application.

Please confirm your details are correct on the next screen, or go back and update your application.

Back to application   Review details

You can make your form more navigable for customers by including forward and back buttons and a menu with links to each section of the form on every page.

Use a progress indicator to motivate customers by showing how far they've come.

Your application is almost complete

Complete our simple form
Complete phone interview
Sign documents

Sign documents online

Clarity is key for form design. When we move through a form we want to know how far we've come and how much more we've got to go. Incorporating a progress bar into our form design we gives customers this information. Customers will appreciate the information, and benefit from the 'goal gradient effect' (the way that we become more motivated when we feel we can 'see the end in sight').
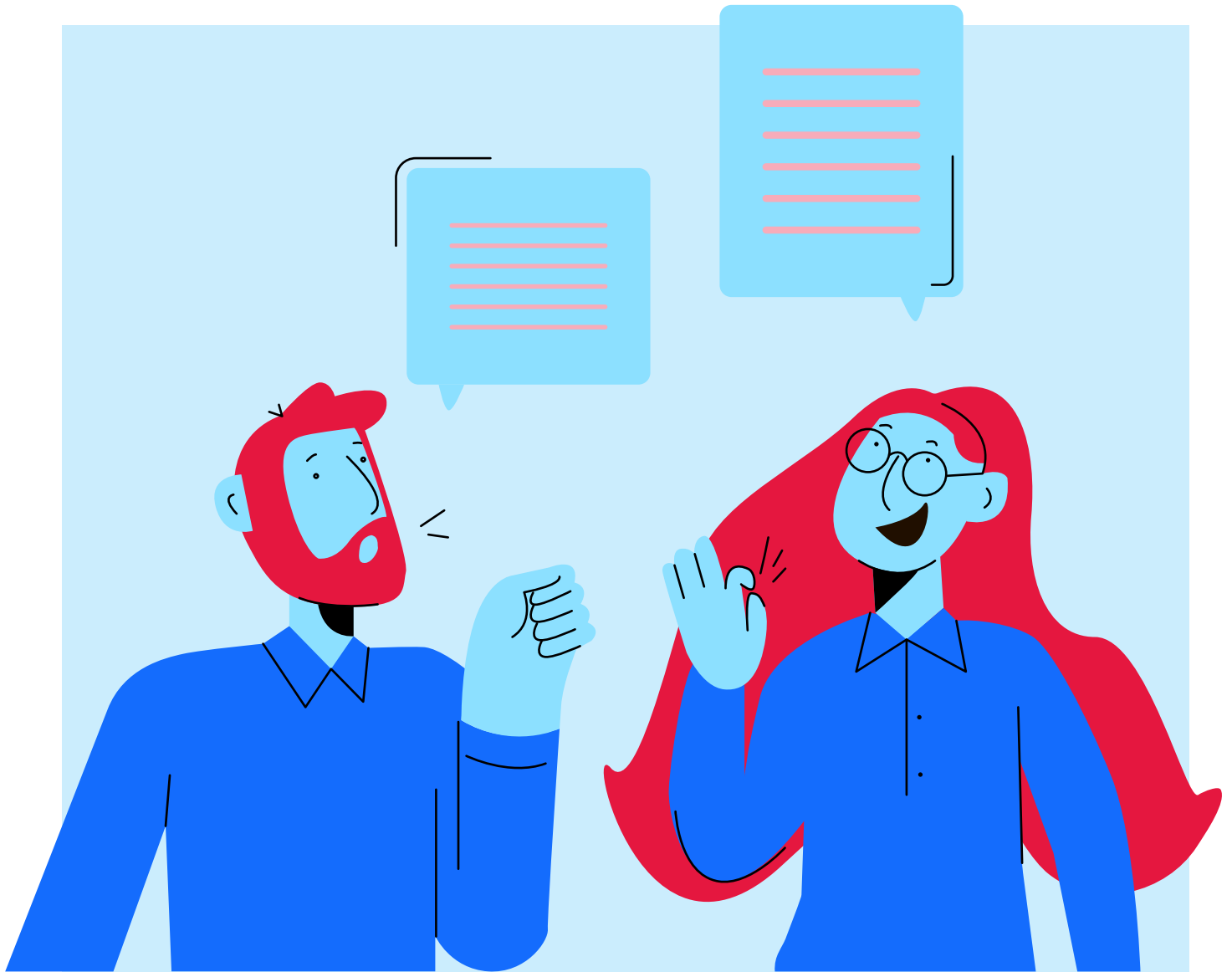
This is particularly effective if you use a 'chunked progress' bar so that after completing one section (say, the introduction) customers see an immediate jump in progress. For example, when you apply for a Seniors Savers Card via the Service NSW website, there is a clear three step progress bar at the top of each page of the online form.[16]

Save customers' progress.

Sometimes customers won't be able to complete a form all at once, especially when they need to gather additional information to complete it. In the case of digital forms, make it easier for customers to pick up where they left off with an 'auto-save' function. This will help ensure customers do not have to repeat any of their work and save time.
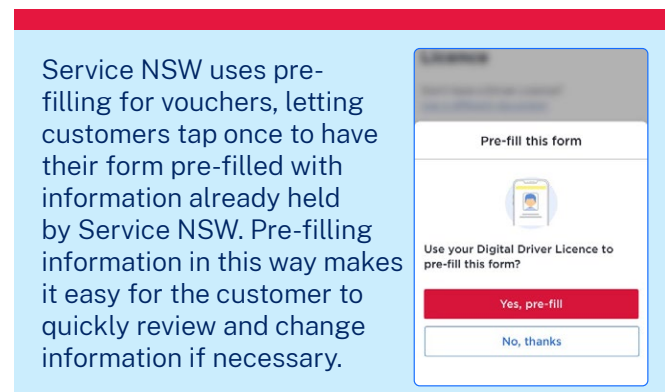
Service NSW uses pre-filling for vouchers, letting customers tap once to have their form pre-filled with information already held by Service NSW. Pre-filling information in this way makes it easy for the customer to quickly review and change information if necessary.

Pre-fill this form

Use your Digital Driver Licence to pre-fill this form?

Yes, pre-fill

No, thanks

3. Language and content

In this section

Make questions easy to answer for your customers

Use plain language, personalisation and simple sentences

Check your form for redundant or confusing content

Make questions easy to answer for your customers

Filling out a form can be time consuming, confusing, and hard. If a form is filled in incorrectly then customers can have to go through the process multiple times. The best way to help customers get it right the first time is to make questions easy to understand and respond to.

How do I do this?

Ask concise questions.

The longer and more complex a question is, the more likely it is to be confusing for your customers. Use short simple sentences to aid understanding. Avoid double-barrelled questions – only ask one thing at a time.

Eliminate redundant questions.

A good rule of thumb is to review existing questions and ask "Is this question necessary?". Keeping forms brief by limiting the number and/or length of questions leads to greater completion rates.

How do I do this?

Ask closed questions rather than open-ended questions.
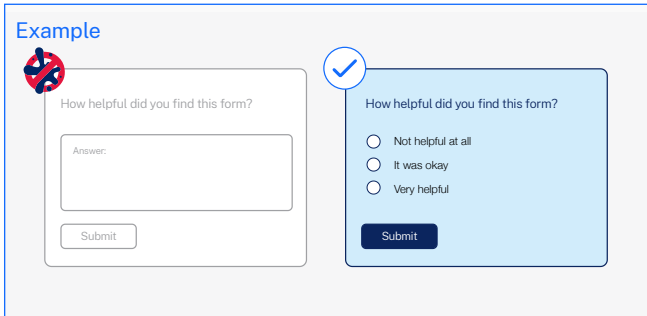
Questions should be multiple choice, rather than open-ended, wherever possible. Customers find open-ended questions to be harder to answer than multiple choice questions.

Research shows that surveys that begin with an open-ended question have 5% lower completion rates than surveys which start with a multiple-choice question.[17] Additionally, open-ended questions are particularly challenging for customers with lower literacy or who rely on text-to-voice services.

Focus on one concept at a time.
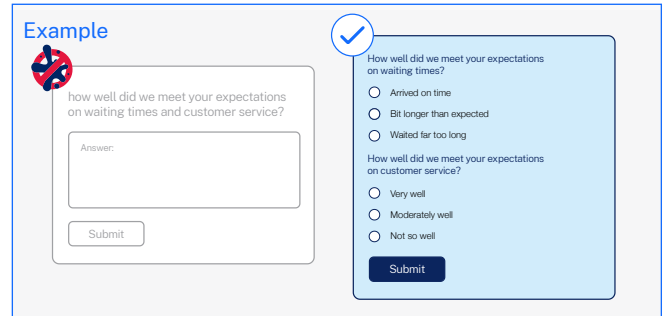
Questions should ask about one thing at a time, so avoid double-barrelled questions such as: "how well did we meet your expectations on waiting times and customer service?"

Questions should be self-contained and self-explanatory.
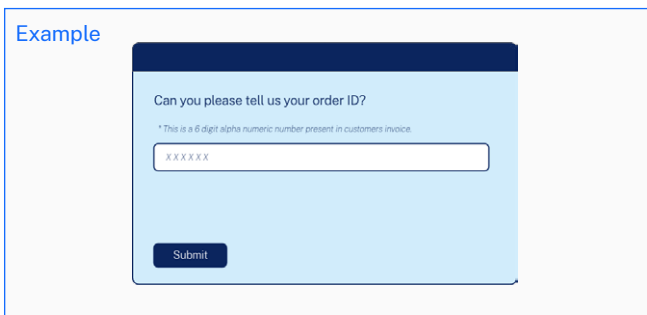
Everything customers must know to answer the question must be included in the question. Customers should understand the terms used, without outside assistance, and no more than two lines of supporting help text should be needed.[18]

Provide example responses in italics.
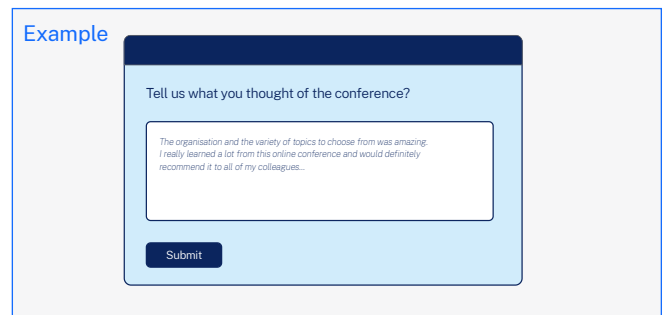
If you must use an open-ended question you can make it easier for your customers by providing an example response in italics. This will give your customers an idea of how they ought to respond, making it easier for them to submit a relevant response.

Use plain language, personalisation and simple sentences to make your form more compelling and easier to understand

Simplify forms by writing questions in plain language where possible, for example by using the Hemingway Editor App. When specific jargon must be used, explain the term with a clear, concise definition.[19]

Why is writing in plain language so important?
Literacy and numeracy in Australia.

Literacy

Plain language is important because we want to communicate to all our customers, including those with lower literacy skills.

Evidence from the Australian Bureau of Statistics (ABS) and the Programme for the International Assessment of Adult Competencies (PIAAC) shows that over 40% of Australians, more than 7 million people, have literacy skills below Level 3.[20]

Level 3 literacy is needed to read everyday texts. This means that many of your customers will find it difficult to read and comprehend text on your website.

By simplifying your language choices, you are making your website more accessible for more of your customers.

Numeracy

The same ABS data shows that over 40% of Australians have numeracy skills below Level 3. This means that many of your customers will find it difficult to do everyday maths.

Use numbers and other maths concepts to illustrate points and reduce the amount of reading needed, but don't expect people to understand complex numerical ideas.

We should not think of these things as deficits but as factors to plan for. Ask yourself: given our audience, what do we need to do write for them?

Remember – there's no downside to making your forms as easy to use, as readable, and as simple as possible.

How do I do this?

Replace jargon and legal terms with easy-to-understand alternatives.

Example

Applicants can utilise the customer assistance channel to enquire about the status of their ongoing application.

Once you have applied, you check where your application is up to with this link.

Poorly worded questions will result in people misunderstanding what is required and providing inaccurate information. A systematic review of factors that affect responses to forms concluded that clear, simple, and unambiguous wording improves form response and completion rates.[21]

Use consistent terminology throughout the form.

Example

Would you like to make a complaint?
○ Yes
○ No

Please tell us of your dispute...

Submit

Would you like to make a complaint?
○ Yes
○ No

Please lodge your complaint here:

Submit

Once you introduce a concept into the form (e.g. 'complaints'), make sure you use the same word to refer to the same concept throughout. Customers can be confused if you switch terminology (for example, halfway through you stop referring to complaints and start referring to disputes) or introduce a new piece of jargon mid-form without explanation.

Use first and second person pronouns to increase engagement.

Example

Enter address

Adress...

Submit

My address

Adress...

Submit

Customers are more engaged by personalised content. Addressed your customers using personal pronouns boosts engagement and draws attention. One easy way to personalise is to use first and second pronouns in your questions. For example, you could say "my address" instead of "Enter address", or instead of saying "select a response" you could say "choose your response".

Check your form for redundant or confusing content

31

Example

Why are you asking for this information?

Do you really need all the information?

○ Yes
○ No

Can you reduce the amount of information your customers have to collate?
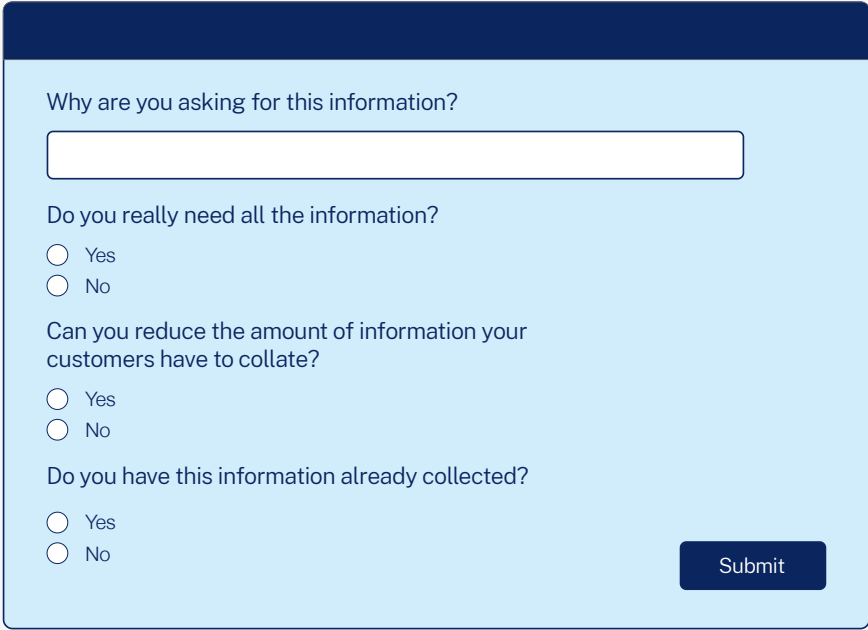
○ Yes
○ No

Do you have this information already collected?

○ Yes
○ No

Submit

Forms should only collect useful information that will be used. Look at your form and ask questions like: Why are you asking for this information? Do you really need all the information? Can you reduce the amount of information your customers have to collate? Do you have this information already collected?

Customers should only have to 'tell us once' when providing their details. We shouldn't ask customers for information that they have already given us. Tell us once is part of the 'Government made easy' NSW Premier's Priority and should inform how we design our forms.
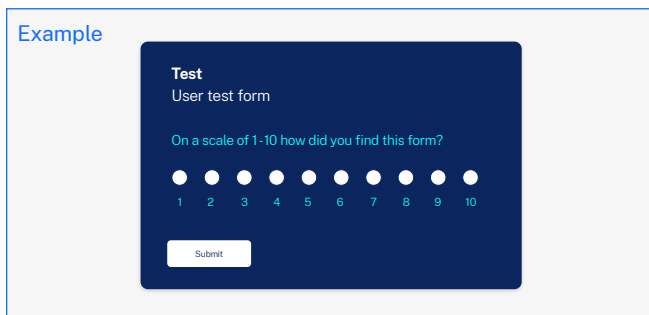
How do I do this?

Only include essential information.

Example

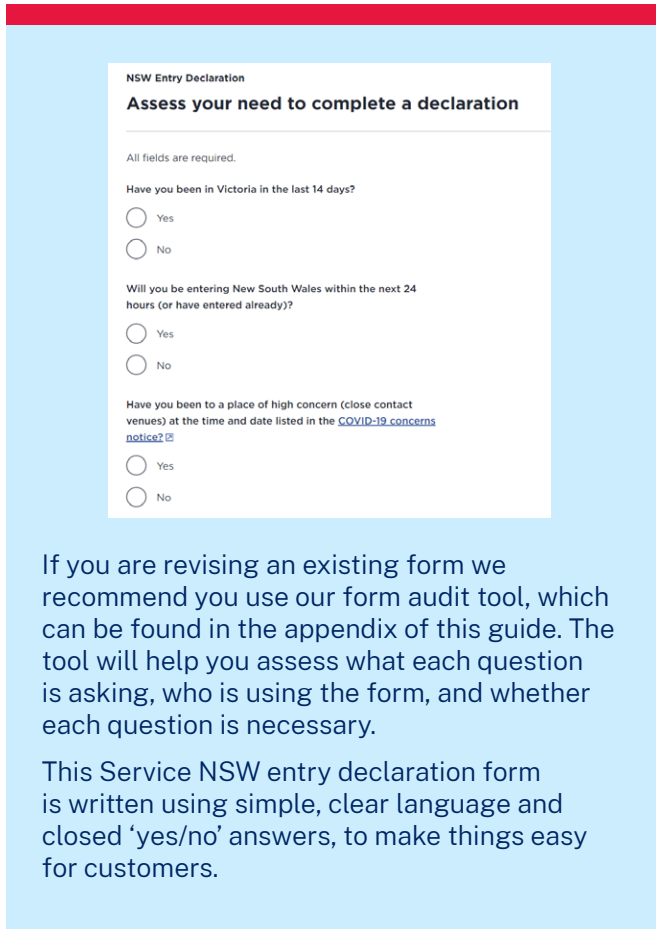This form is available for print and digital

Paper

Mobile

Web
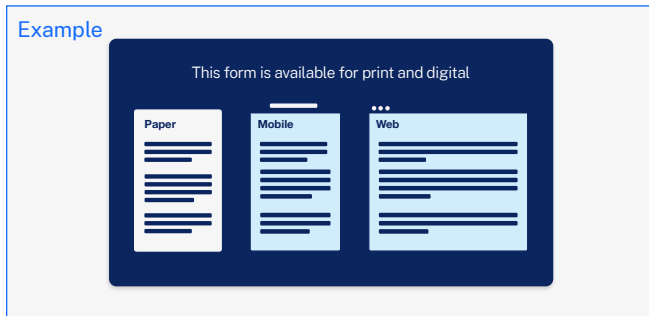
Remove technical or legal information from the form or move it to an appendix so that it doesn't clutter the form.

For a primer on writing questions see the Victorian government's guide to writing good questions in forms:

https://www.vic.gov.au/qa-forms#how-to-write-good-questions

Test your form with customers.

Example

Test
User test form

On a scale of 1-10 how did you find this form?

● ● ● ● ● ● ● ● ● ●
1 2 3 4 5 6 7 8 9 10

Submit

User test your form with customers to check for confusing content. If customers need to have questions explained to them then those questions need to be improved.

NSW Entry Declaration
Assess your need to complete a declaration

All fields are required.

Have you been in Victoria in the last 14 days?

○ Yes
○ No

Will you be entering New South Wales within the next 24 hours (or have entered already)?

○ Yes
○ No

Have you been to a place of high concern (close contact venues) at the time and date listed in the COVID-19 concerns notice? ⬈

○ Yes
○ No

If you are revising an existing form we recommend you use our form audit tool, which can be found in the appendix of this guide. The tool will help you assess what each question is asking, who is using the form, and whether each question is necessary.

This Service NSW entry declaration form is written using simple, clear language and closed 'yes/no' answers, to make things easy for customers.

4. Next steps

In this section

[Make it as easy as possible to submit the form](#)

[Tell customers what will happen next and how long it will take](#)

Make it as easy as possible to submit the form

Example

Thank you for completing the form, you can follow your submission's progress with this link

Link   Not right now
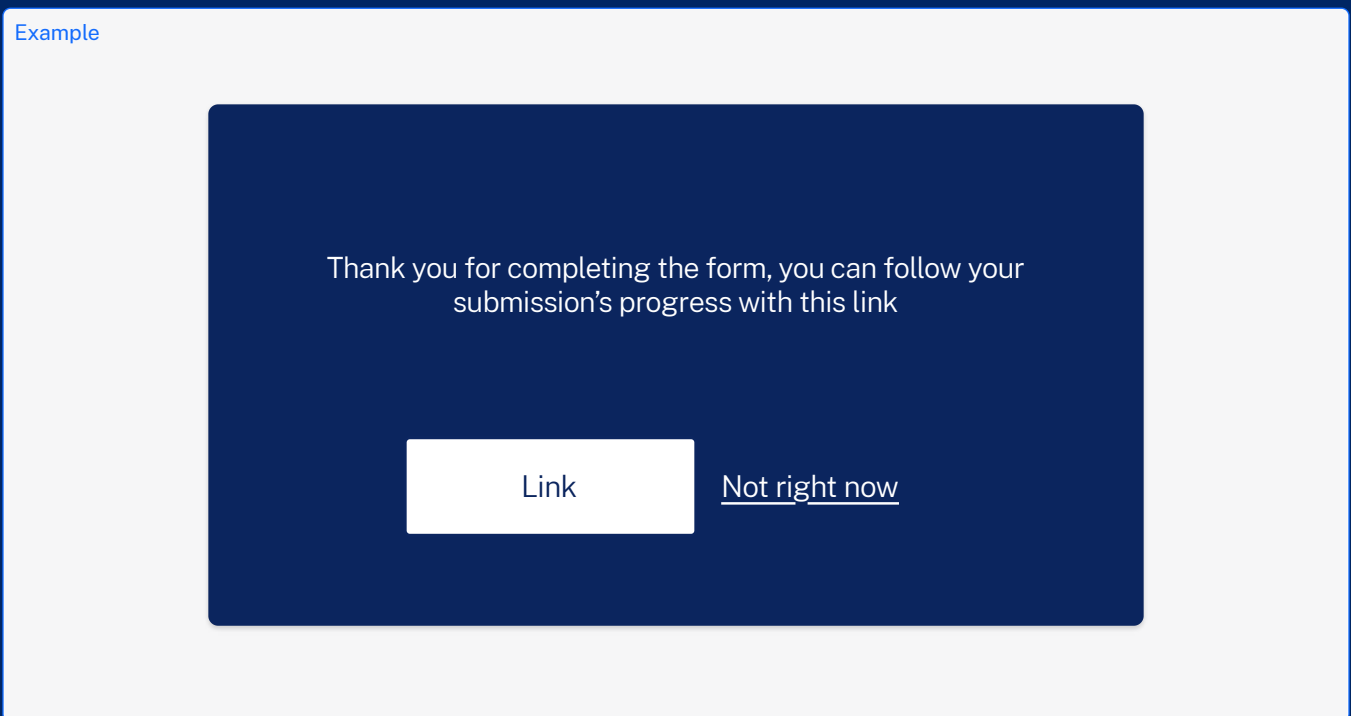
Filling out a form takes time and mental energy. The submission process needs to be quick, very simple, and provide customers with clarity as to what happens next.

Once a customer has submitted the form, they should feel confident about what is going to happen next, what kind of follow-up contact they can expect, and how long this is going to take.

How do I do this?

Allow both online and paper submission of forms where possible.

Example

Scan the code to complete the form online

Prefer to complete this form on paper?
Download the printable version here

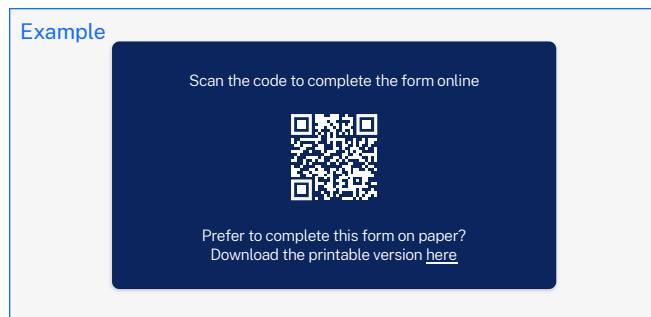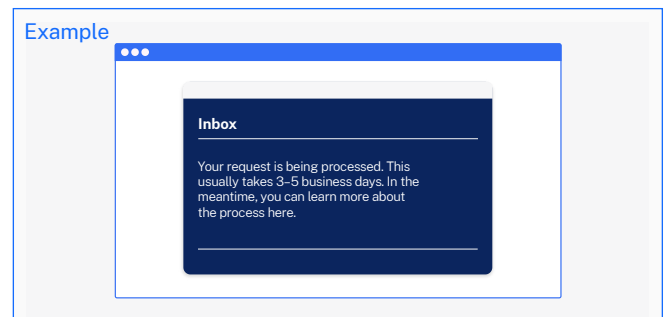Make the form inclusive of all customers' needs by allowing customers to complete the form in their preferred way. For example, in one study, removing the requirement to print forms and allowing online submission has increased completion of administrative tasks by 26%.[22] On the other hand, paper forms may be the preferred format for some groups, particularly customers who have digital literacy issues, who need to take the form somewhere to get help completing it, or who lack access to a computer or mobile phone.[23]

Allow form completion and submission in as many file formats as possible.

Example

Inbox

Your request is being processed. This usually takes 3–5 business days. In the meantime, you can learn more about the process here.

Some customers may have difficulty accessing printers, scanners, or computers. Similarly, Australians now use their mobile phones more frequently than desktop or laptop computers for online activities.[24] Optimise forms so they can be viewed, completed, and submitted in mobile format. For example, if you are asking customers to select their answer using a slider bar, make sure the slider bar can be easily used on a small touchscreen.[25]

Some customers may find filling in forms digitally to be very challenging. It is important that you develop alternatives so that these customers are not unable to fill in your forms. You can do this by providing physical forms at service centres and helping customers who find forms challenging, such as customers with low digital literacy.

Tell customers what will happen next and how long it will take

Example

Thank you for completing the form, you receive a confirmation email shortly and our team will be in touch within 2 business days

Finish
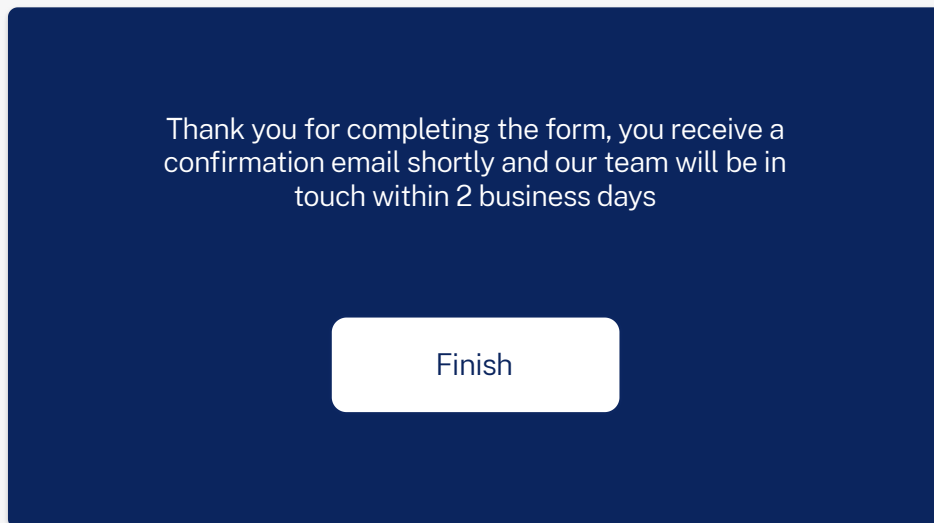
People prefer outcomes that are certain over those that are uncertain. This is known as the ambiguity effect.[26] For example, research shows that public transport users are less concerned about late service if they are provided with a realistic estimation of the wait time.[27]

The ambiguity effect also appears to be reflected in government services: a McKinsey study found that citizens cared more about knowing when a passport would arrive than the processing speed itself.[28]

How do I do this?

Confirm that customers have successfully submitted their form.

Example

Expect online notifications

Thanks for submitting your request, your service is expected to commence in 3 business days
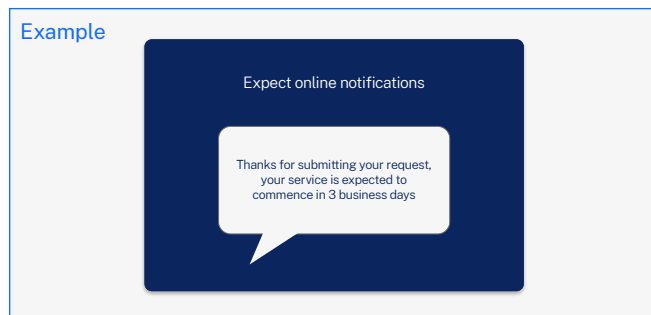
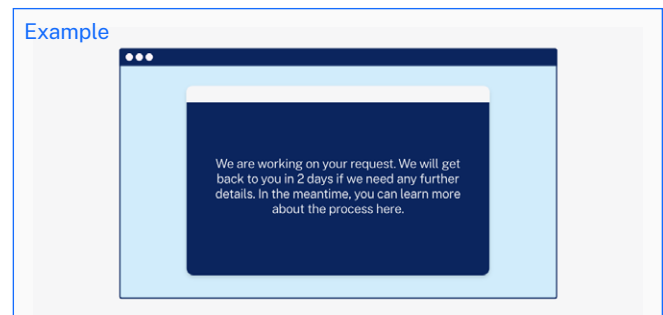You can reduce ambiguity by confirming immediately with customers that their form has been received via email or text message. Similarly, customers should be informed of the next steps and how long they are likely to wait. One study sent patients who had enrolled in a health service text messages updating them on when their service was likely to commence.[29]   Those who received the text message were more likely to complete a course of treatment than those who did not.

Tell customers how long they will have to wait and provide frequent updates.

Example

We are working on your request. We will get back to you in 2 days if we need any further details. In the meantime, you can learn more about the process here.

Customers should know from submission how long they will have to wait and be provided updates when the form moves to a different stage of the approval process.

Customers find waiting more frustrating when they have no information on how long they are going to be waiting, why the wait is so long and what is happening while they wait.

Studies have found that giving customers clarity over how long they have to wait, why, and what is happening while they wait reduce anxiety and improve the experience for the customer.[30]

How to test whether changes to your form work

What works is not always consistent or certain. Even when we use evidence-based behavioural insights, we cannot always be sure what will work and what will not in a particular context. Testing proposed changes to your forms is a critical step because it:

- Enables you to be confident that your changes yield the desired benefits
- Helps you minimise unintended consequences
- Helps you maximise cost-benefit because you will only implement and scale the changes that are proven to work

To learn more about testing and find a testing method which works for you read our guide to testing here.

Endnotes

1 Behavioural Insights Team (2014). *EAST: Four simple ways to apply behavioural insights*.

2 Behavioural Insights Team (2021). *Improving equality, diversity, and inclusion starts with good data.*

3 Galesic, M., & Bosnjak, M. (2009). Effects of questionnaire length on participation and indicators of response quality in a web survey. Public Opinion Quarterly, 73(2), 349-360.

4 Behavioural Insights Team. (2016). *2015-2016 Update Report.*

5 Behavioural Insights Team. (2014). EAST: *Four simple ways to apply behavioural insights.*

6 Gobet, F., Lane, P.C., Croker, S., Cheng, P.C., Jones, G., Oliver, I., & Pine, J.M. (2001). Chunking mechanisms in human learning. Trends in Cognitive Sciences, 5(6), 236-243.

7 Behavioural Insights Team. (2014). EAST: *Four simple ways to apply behavioural insights.*

8 Behavioural Economics Team of the Australian Government. (2020). Form-a-Palooza WISER framework.

9 Behavioural Insights Team. (2019). Best practice guide: Improving consumer understanding of contractual terms and privacy policies: *evidence-based actions for business.*

10 Behavioural Economics Team of the Australian Government. (2020). Improving Government Forms: Better Practice Guide. Department of Prime Minister and Cabinet.

11 Fochmann, M., Müller, N., & Overesch, M. (2018). Less cheating? The effects of prefilled forms on compliance behavior.

12 Chetty, R., Friedman, J. N., Leth-Petersen, S., Nielsen, T. H., & Olsen, T. (2014). Active vs. Passive Decisions and Crowd-Out in Retirement Savings Accounts: Evidence from Denmark. *The Quarterly Journal of Economics*, 129(3), 1141–1219.

13 Ebeling, F., & Lotz, S. (2015). Domestic uptake of green energy promoted by opt-out tariffs. *Nature Climate Change*, 5(9), 868–871.

14 United Nations Environment Programme, GRID-Arendal and the Behavioural Insights Team (2020). The Little Book of Green Nudges: 40 Nudges to Spark Sustainable Behaviour on Campus.

15 Behavioural Economics Team of the Australian Government. (2020). Form-a-Palooza WISER framework.

16 https://forms1.service.nsw.gov.au/apply-seniors

17 Liu, M., & Wronski, L. (2018). Examining completion rates in web surveys via over 25,000 real-world surveys. *Social Science Computer Review*, 36(1), 116-124.

18 https://www.vic.gov.au/qa-forms#how-to-write-good-questions

19 Behavioural Insights Team. (2014). EAST: *Four simple ways to apply behavioural insights.*

20 Programme for the International Assessment of Adult Competencies, Australia, 2011-2012, Australian Bureau of Statistics

21 Fan, W., & Yan, Z. (2010). Factors affecting response rates of the web survey: A systematic review. *Computers in Human Behavior*, 26(2), 132–139.

22 Tasoff, J., & Letzler, R. (2014). Everyone believes in redemption: Nudges and overoptimism in costly task completion. *Journal of Economic Behavior & Organization, 107*, 107-122.

23 Edwards, M. (2007). The law, marketing and behavioral economics of consumer rebates. *Stanford Journal of Law, Business, and Finance*, 12(2): 362–425.

24 Nielsen Australia. (2018). Australians 18+ spent 12% more time on smartphones in February 2018 versus a year ago. Retrieved from https://www.nielsen.com/au/en/press-releases/2018/february-2018-digital-ratings/

25 Antoun, C., Couper, M. P., & Conrad, F. G. (2017). Effects of mobile versus PC web on survey response quality: A crossover experiment in a probability web panel. *Public Opinion Quarterly, 81*(S1), 280-306.

26 Ellsberg, D. (1961). Risk, ambiguity, and the savage axioms. *The Quarterly Journal of Economics, 75*(4), 643-669.

27 Ferris, B., Watkins, K., & Borning, A. (2010, April). OneBusAway: results from providing real-time arrival information for public transit. *In Proceedings of the SIGCHI Conference on Human Factors in Computing Systems* (pp. 1807-1816).

28 Bettinger, E. P., Long, B. T., Oreopoulos, P. & Sanbonmatsu, L. (2012). The role of application assistance and information in college decisions: Results from the H&R block FAFSA experiment. *The Quarterly Journal of Economics*, 127(3), 1205-1242.

29 https://www.bi.team/blogs/how-can-we-support-mental-health-patients-on-waiting-lists/

30 Nie, W. (2000). Waiting: integrating social and psychological perspectives in operations management. Omega: The international journal of management science 28, 611-629

We want to hear from you!

If you have comments, questions, or feedback on the guides get in touch with us at
sludge@customerservice.nsw.gov.au

sludge@customerservice.nsw.gov.au

NSW
GOVERNMENT