

Effective Communications Checklist

Best Practices for Using Behavioral Insights to Improve Communications

Principles of behavioral science can improve an organization's communications approach and impact. Use this checklist to assess how well your current communications incorporate practices based on strong evidence, and apply these lessons to help get your message across.

INFORMATION



HIERARCHY

Is the most important information at the top of the page or emphasized using color, size variation, and call-outs?

Is the text brief and to the point, with only the necessary information included?¹



CLEAR INSTRUCTIONS

Is the main point of the communication prominent, clearly written, and explained?

Is the language simple and easy to understand for someone new to the topic?²

Is there a checklist of steps and other when/where/how prompts?

Are the reader's immediate next steps clear, in order, and prominent?

Is there a clear deadline for response?³

MOTIVATION



IMPORTANCE

Have you explained why the action must be taken?

Have you emphasized what the reader could lose if they do not take action?

Does the language and tone help the reader identify as someone who would complete the desired action?⁴

Is the communication personalized beyond just the recipient's name?

Is the sender's name included with title and contact information?

Is the sender a person who the recipient will recognize and respect?

Is the communication written in the second person, referencing actions 'you' should take?



tone & PERSONALIZATION

ACTION



TIMING

Are you sending the communication at a time when the reader is most likely to have the mental and financial resources to act?

Have you sent the communication with enough time to allow the reader to complete the task?

Is the timing tied to a calendar event like the new year or tax season?

Does the number of communications and reminders align with the difficulty and urgency of the task?⁵



CHANNELS

Will more than one communication channel be used for outreach?

Are the channels appropriate and likely to reach the intended recipient?⁶

NOTES:

¹Keep information that is only relevant to a small group of recipients, complex legal language, and background information at the bottom or back of the page, or otherwise deemphasized.

²Explain all acronyms. Avoid jargon whenever possible.

³Even if there is no real deadline, consider imposing an artificial one.

⁴Identity priming can change the way people perceive themselves in relation to others and motivate them to take a desired action.

⁵More frequent communications and reminders may be needed if tasks require multiple steps; are unfamiliar, complicated, or voluntary; or their benefits aren't immediately clear.

⁶**Text messages** work for prompting immediate, well-understood actions. **Phone** calls work for prompting immediate, poorly understood actions. **Emails** work as reminders. **Postcards** work for quick information or timely reminders. **Letters** can work as reinforcement alongside other channels, but consider writing on the outside of the envelope to help the letter get noticed.