

# Behavioral Insights Communications Checklist

## Using the checklist

The way we write and structure documents can make them much more impactful.

Before sending out an important communication, make sure to review the checklist and see if there are edits you can make to improve it. While it may not always be possible to complete each item on the checklist, communications that incorporate more behavioral insights will have greater potential.

| IS IT EASY TO UNDERSTAND?  | IS THE IMPORTANT INFORMATION FIRST?  | CAN IT BE PERSONALIZED?  |
|--|--|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Skim-test:</b> Can the targeted reader immediately understand what the communication is about – i.e., what the key points are and what the follow-up actions are?</li> <li><input type="checkbox"/> <b>Ease of processing:</b> Is the font easy to read? Is the format clear? Is information presented in a logical order?</li> <li><input type="checkbox"/> <b>Ease of understanding:</b> Is the language simple? Is there too much jargon or technical information that won't be clear to a casual reader?</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Do the first 2 paragraphs state the most important information?</b> People rarely read beyond the first section of a letter, so make sure to state important information early. The rest of your document should include headings or bullet points that start with key words.</li> </ul> <hr/> <p style="text-align: center;"><b>IS THE ACTION CLEAR?</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Is there a clear, single next step or action to take?</b> There may be multiple follow-up steps, but there should be a clear instruction to do the first one.</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Did you avoid generic headers</b> (e.g., “Dear Sir/Madam” or “Dear jobseeker”) and use the recipient’s first name if possible?</li> <li><input type="checkbox"/> <b>Did you avoid using impersonalized signatures</b> that refer to a group or your organization as a whole? Instead provide a direct, personalized contact (e.g., individual case manager).</li> <li><input type="checkbox"/> <b>Did you convey that you know and understand the recipient and his/her needs?</b></li> </ul> |

## Behavioral Insights for Labor-Related Programs

Effective Department of Labor programs often require people to take action to get the benefits offered, but people often fail to do so. The reasons can be varied: they aren’t motivated to participate or they intend to but get distracted, or they begin and then are deterred by seemingly minor operational hassles. Fortunately, behavioral scientists have developed many techniques to improve the effectiveness of program procedures—techniques that have been applied successfully in many Department of Labor programs. *(Read about pilots conducted by Mathematica Policy Research and ideas42 for the DOL Chief Evaluation Office, as well as other tools for applying behavioral insights, at <https://www.dol.gov/asp/evaluation/BISstudy/>.)*