Making your documents work – document design in a multicultural society

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INTRODUCTION

Document design is a vitally important field of study if one considers the cost – in real and in abstract terms – of documentation in areas such as government, business and education. It is a field that, over the past two decades, has drawn quite a lot of attention in the USA and in Europe, showing that people in the public and private sectors are starting to understand the impact of effective documentation in an age where information has become the most important commodity in our lives.

In South Africa, however, the advantages of good document design – and the negative effects of ignoring it – are still not well-understood. Organisations, institutions and decision makers do not always have a clear understanding of the importance of good documentation, or of the costs that they incur when they produce bad documentation.

Why is document design important?

There are a number of reasons why we should spend more time pondering the insights provided by this particular field of study:

- We are experiencing a new social order, an order in which society is driven to a large extent by information. In this context, it becomes vitally important to understand the advantages of good document design.

> Your document has to compete with literally millions of others. Can you afford to ignore the advantages of good document design practice?

- Communication has become more demanding and more competitive. We are bombarded by so much of it that we have become more discerning and are no longer easily satisfied.

- Research tells us that an average of 60% to 65% of the time spent at work is spent on documentation in general, i.e. reading, writing and responding.

- Many of the services or products that we offer cannot exist without the communication related to them and, in most cases, this communication takes the form of documentation.

- Analyses of documents produced in a wide variety of institutions and companies show that the quality of documentation in South Africa still leaves much to be desired.

PART 1: THE CONCEPT OF COST IN DOCUMENT DESIGN

The focus in the field of document design is on the document and the wider context in which the document comes into being and is received. One of the problems in this wider context is

the question concerning the cost of the document, where **cost** should be seen in its literal *and* its metaphorical sense.

This particular aspect deserves more attention than it is currently receiving. In fact, there is reason to believe that institutions do not always have a good idea of what these costs are, and that they do not realise how high the cost of a document can be, especially if it is badly designed.

A practical example

During a workshop by the Unit for Document Design of the Stellenbosch University, a company presented a single A4 page of text on performance improvement. What was disturbing was that this document was not well-received within the company: staff signified their disapproval in a number of meetings, and had many discussions among themselves and with management.

So, what was the problem and what losses, if any, did the company suffer? The following design features, or clusters of features, proved to be of some concern, creating what one could call the flashpoints of the text:

Topic

The text addressed the topics of *performance*, *performance assessment* and *performance improvement*, as well as the Performance Improvement Plan (PIP) of the particular company – a highly controversial and emotional topic, which, by its very nature, creates a flashpoint in itself.

Target audience

The document was sent to all members of staff. Although the text itself did not give a clear indication of the intended audience, an analysis of the text suggested that it was written for managers. The divide between the intended audience (all staff members) and the actual audience signified by the text (managers) was another rather problematic flashpoint in this particular text.

Context/circumstances

This was the first and only document sent to staff members on this particular issue. It reached them in a period when there seemed to be a lot of uncertainty regarding staff issues and new personnel management policies.

Style

Given the intended goals of the document, the style left much to be desired. The following aspects of style had flashpoint potential:
- the use of the passive voice, creating a very formal and distancing effect in the text, e.g. "*If this performance improvement cannot be achieved and if no other alternative can be found…*"

- not addressing the reader and, in doing so, missing the opportunity to make the text more reader-focused, a feature that is of vital importance if persuasion is one of your goals
- using the third person to refer to the reader, e.g. "*to ensure that the employee understands that his or her performance has important shortcomings…*"
- a choice of words that does not soften the blow, e.g. "*if the employee does not show evidence of reasonable performance improvement the Company will unfortunately have to terminate the services of the employee.*"

The cost of the text

The question now is: what was the cost to the company? First we will consider the real costs:
- approximately 20 meetings involving from 4 to 20 people per meeting, with each meeting lasting about one hour
- a large number of telephone calls between staff, between management, and between staff and management
- the production costs of the document, which were not taken into consideration

In the workshop, three accountants made a **very conservative** estimate, suggesting the real costs to total approximately R350 000 – a substantial amount of money for one A4 page.

However, the real costs were only the beginning. It is really difficult to translate the loss of face, lowering of morale, fears of staff members, and the tension between management and staff into something as tangible as money. A number of participants in the focus group stated that it would take quite some time to make up for the losses, both financially and emotionally.

What costs need to be considered?

When one thinks about the cost of a document, two broad categories emerge: the so-called real costs, normally measured in financial terms, and the more metaphorical 'costs', quite often referred to as the human or emotional costs. The real costs include:

- **Hours spent in the production and reception phases** (i.e. writing, reading and implementing): In the case discussed above, 24 participants estimated that they spent somewhere between 55% and 65% of their day working on documents (either producing or reading them).

  This is something that institutions should take seriously, since it means that they spend this percentage of their salary budget on 'words on paper'. Added to the production costs, there are the support costs, i.e. the hours spent on customer/client support.

- **The technical side**: Documents have to be printed in a paper format or reworked into website format. One therefore has to take the cost of hardware and software, printing, layout and other aspects of preparation into consideration.

The metaphorical 'costs' are the costs that we tend to forget about, since they are often less tangible. However, the price that institutions pay in these categories is quite often much higher than the other so-called 'real' costs, for example:

- **Negative image**: A badly written, badly designed document can create a negative image of an institution and, in the world of business, repairing such a loss of image takes a lot of effort, time and money.

- **Disturbed interpersonal relationships**: Badly designed documents can very often lead to a disturbance in the relationship between client and institution, employee and management, and between employees. Again, the repair of these relationships can be very costly.

PART 2: THE

> No matter how you look at it, in the end bad document design will cost you, if not in real money terms, then in more metaphorical, abstract terms.

FIELD OF DOCUMENT DESIGN

What is document design?

What then is document design and what can it offer? According to Schriver – during an interview with Laurie Hunter (2000:28) - document design can be defined as the act of integrating word and image with an eye towards meeting an audience's needs and expectations. In layman's terms, this definition can be explained as the study of what makes a document 'tick'.

Whether it is a brochure, website article, instructional manual, research report, policy document or form, document design studies the tools that can be used to convey the correct message to the readers of the message – tools which, in the end, must also guarantee that the message has the desired effect. If the documents that convey these messages are badly designed, the readers feel frustrated, powerless and considerably less effective.

Document design is the act of bringing together prose, graphics (including illustrations and photography) and typography for the purposes of instruction, information or persuasion. Good document design enables people to use documents in ways that serve their interests and needs. While documents must also meet the requirements of the clients, the reader's needs should always drive the design activity (Schriver, 1997:10).

Example

We all have experience of the rather strange, difficult to read medicine pamphlets that one finds in the box or bottle of medicine bought across the counter at a pharmacy.

By bringing the readers and consumers of the documents into the picture, document designers increase the likelihood of creating medical pamphlets that patients can understand easily. Document design is then characterised by the way the practitioners envision the reader as the active participant and major stakeholder in the design and usage of the documents.

Is there a change in focus?

The field of document design has brought about a considerable change in focus in studies on language and communication, and signals the change in attitude needed in institutions and companies in South Africa and abroad.

Initially, the focus was on the reader and the reader's responsibility to understand and process the document. Now the responsibility has shifted to the writer: The writer has to take the reader into consideration and see to it that the tasks of reading, understanding and responding are made easier by good document design. The writer needs to be aware of the needs, knowledge, attitudes, values and culture of the reader.

Document design brings the reader into the process of document design, and the reader becomes an active participant and stakeholder. Readers should form part of the process by their participation in the formative testing phase of a document, for instance by testing a document before it is released in the marketplace.

It's easier than you think!

Companies developing marketing or other documents often think it is too much trouble and too costly to pre-test a document before sending it out to prospective readers. However, they do not consider the relatively low cost of pre-testing in relation to the (quite often very high) total cost of the document, as well as the cost of an unsuccessful document.

But is it as difficult and costly as it seems? By simply asking 20 or more prospective readers to give you some feedback on your document, you can identify many problems before finalising the document and sending it on its way.

What does a document designer have to offer?

Schriver (in the interview with Laurie Hunter, 2000:29) mentions that experienced document designers know a great deal about writing and visual design for everyday purposes, including what we experience at work, at home, at school, in medical environments, in the business world, and from government. They also have sophisticated knowledge of audiences and their reasons for using information, and take pride in finding out how the audience think and feel about the information they plan to design.

In the interview Shriver also says the following (Hunter, 2000:29): "Traditionally, document designers spent their time generating prose and graphics to be presented on paper. But the modern day document designer obviously has to deal with a variety of other media", such as electronic media (for computer-based learning, e-marketing, online user-assistance, etc.), video, the web and multimedia.

Many technical, medical and government environments now realise that information and communication are crucial to their success, and it is here that document design comes into the picture, as document designers are devoted to solving the practical problems of organisational communication.

What was the impetus for recognising document design as a field of science?

Consumerism: In this century, document design has developed dramatically in industrialised, market-oriented countries. It is reasonable to believe that document design emerged largely because these countries shared a need for functional communication and because their citizens became consumers who demanded functional communication.

Documents of many kinds are needed to help citizens carry out their day-to-day activities at work or at home, and provide a vital communication link connecting business, education, government and the public. In industrialised nations, the private and public sectors have created an increasing demand for documents.

Science and technology: As activity in science and technology increased in the past century, so too did the demand for communications that would help people understand and take advantage of new developments.

Prior to World War II, the production of sewing machines, automobiles, cameras, typewriters and radios created the need for hundreds of documents. After World War II, technical writing became a recognised profession, and the giant technological corporations, such as General Electric and Westinghouse, opened separate departments of technical writing after finding that it was no longer cost effective to pay engineers to both design and write (Connors, 1982:341). The development of computer-related technology also generated an enormous need for well-designed documents, and this need is still growing.

The increasing size of business and government, and the consequent needs for technologies of communication, also spurred the growth of document design. Organisations found that documents could be vehicles for getting messages out to employees and customers, but that they could also serve as a method of maintaining control and keeping record (Schriver, 1997:47).

Schriver (1997:52) points out that the increased need for professional writers and designers in a range of business and organisational contexts has stimulated two significant changes with regard to document design: first, a movement toward professionalisation through the growth of journals, conferences and organisations in the field of document design; and secondly, the development of academic programmes in writing and design, particularly at university level.

PART 3: DOCUMENT DESIGN IN THE CORPORATE ENVIRONMENT

Why is document design relevant in the corporate environment?

Successful communication is the key to successful business. In the corporate environment, communication material is created to convey information to employees and also to communicate with clients. For example, in the banking sector material such as memos, reports, in-house newsletters and manuals are used to communicate with employees and colleagues. The banking sector also creates advertisements, letters, web articles and the like to communicate with external clients.

All these documents take time to read, and take even more time should the reader need to react to the document. In the corporate environment, time is always of the essence and if a document is badly designed or written, it demands more time from the reader. This confirms the need for document designers in the corporate world.

Documents should be seen as consumables. Readers are confronted with a large choice of documentation, things that they have to 'consume', in many cases in order to make their professional or personal worlds work. They are expected not only to read and understand, but also to act on the information presented to them. And to make matters worse, they also have to deal with a large variety of document types, each with its own particular design features, goals and effects.

What does this tell us about the goals for document design? First, it becomes clear that we need to create a mind shift in the writers of documents. Document designers need to understand that readers are consumers of the documents, and will need to get the job of understanding, processing and reacting done.

Document designers also need to understand that a document should be designed in such a way to make it as easy as possible for the reader to consume the information. The responsibility is on the document designer, and not on the reader, to figure out the content or to struggle to make sense out of the instructions given.

How do documents communicate in the corporate environment?

Documents can be defined as communication tools in the corporate environment, and in this sense they have a variety of purposes, for example:

- To *share information*, for example in an in-house journal or memo. All documents have this communicative goal, and therefore one needs to understand the relevant design features related to the effective conveyance of information, such as good information structure, coherence, relevance, style and formulation.
- To *instruct* people, for example colleagues or employees, via e-mail, a registration form, a manual, etc. The design of instructive documents is a complex issue needing the input of a well-trained document designer – it is not as simple as it appears.
- To *manage a project*, which can take place via circulars or memos, or by means of a report to all the role players and subcontractors.
- To *persuade* people, in many cases to get them to think differently about an issue and then to act upon it. Persuasion is a vitally important activity carried out by means of documentation, and therefore knowledge of the different methods of persuasion and the ways in which they influence the design of the document become vital.
- To **motivate** people to act, such as getting people to practise safe sex in the age of HIV/AIDS. The methods used to motivate are not always easy to decide on. For example, the use of fear to motivate people is not always as effective as it may seem.
- To *formulate a policy*. This could be done, for example, by drawing up an initial document, and then asking for comments via the internal website.
- To *advertise* something, such as a new product, by compiling a brochure, producing an advertisement for a newspaper, or by sending an e-mail marketing message.

For every document type, readers will have certain expectations and values, and each document type also has an information structure, external structure and style of its own.

Document designers need to balance the readers' expectations with the function, content, structure and style of the document type.

PART 4: PRACTICAL TIPS FOR EFFECTIVE DOCUMENT DESIGN

Define goals: The designers of documents do not always decide beforehand what the goal of a document is, and this may lead to a lack of focus that readers may find confusing. By considering this before the document design process starts, the primary goal of the document will maintain the focus and help the reader understand the relevance of the content.

Reach goals: It often happens that a document loses focus along the way and therefore does not reach the goal. For example, if a policy document that primarily needs to persuade the reader to follow and maintain the policy has a strict, formal and patronising tone, the text becomes dehumanised and the reader is not persuaded to support the policy.

Address the needs of the reader: The writers and/or designers of documents seldom think about the profile of the primary reader group of the document and, in the process, create a document that communicates only in general and not to the intended readers.

For example, when writing a business letter to a client regarding increased tariffs to be implemented, companies often only use the template that was used in previous years, without considering that the reader profile might have changed. By investigating the profile and needs of the readers, the writer will be able to compile a text schema in line with the main questions the readers will have, and thereby address the information needs of the reader.

Practical example

In a notice to homeowners, a municipality announces water restrictions and, in an effort to motivate the homeowners to adhere to these restrictions, mentions that water shortages can cause a loss of water pressure that may have a detrimental effect on fire fighting.

If I have been living in my area for more than twenty years and have never experienced a fire in my own home, or even worse, in my area, would this be the best information to motivate me to save water? I think not. I will, however, respond to the fact that a water shortage may influence my supply of water for everyday usage.

Send a coherent message with one clear theme: In order to compile a coherent text, writers should always plan the document before writing it. The main message should run through the document like a golden chord to keep the focus, thereby helping the reader to grasp the essence of the document.

Ensure a clear structure: The writer needs to determine the main questions the primary reader group will ask when reading a document. These questions, structured hierarchically, can serve as a text schema to develop a clear structure. A clear structure is easier to follow and read, and is also easier to write.

Create a suitable style: Writers need to find out as much as possible about the primary reader group beforehand in order to compile a document in a suitable style. The style also needs to take the primary goal of the document into consideration. Writers always need to be critical about a traditional style – an instructional manual does not need to be strictly formal, and an annual report does not always need to be written in the passive voice.

Create a suitable look and feel: Readers have ever-increasing levels of visual intelligence, and they understand the role of elements such as graphics and layout. They are therefore easily disturbed by a lack of creativity or an unmotivated choice of features that create a badly defined look and feel. Non-verbal elements can have a complex variety of functions, such as supplementation or complementation of the content, instructional functions, the creation of a metaphorical or humorous point of reference, etc.

Balancing the needs of the readers and the organisation: Although the primary reader group is one of the most important role players in the document design process, other readers also have to be kept in mind, such as sponsors, teachers, sales personnel, distributors, etc. Therefore the document designer has to negotiate between the needs of the multiple reader audiences (Schriver, 1997:44)*.*

Another complicating factor to keep in mind is the document designer's responsibility to strike a balance between the needs of multiple readers and the needs of the organisation. Quite often these needs can clash. For example: An organisation may have a goal to convey certain information, but may not realise that this information is not what the reader is seeking. Our research often provides us with cases where the document is topic-focused in the sense that it conveys the information that the organisation has on the particular topic, in stead of being reader-focused, that is concentrating on the needs of the reader. In the process the organisation may provide too much content, the wrong content or signify content as important, whereas the reader finds the opposite.

PART 5: THE RELEVANCE OF DOCUMENT DESIGN IN SOUTH AFRICA

In the South African context, research in the field of document design has special social relevance. Preliminary investigations have shown that South Africa, with its complex, multicultural and multilingual character, has a special need for the effectiveness of texts in the working documents of different sectors of the community. These sectors include the government sector, the health sector, the corporate sector and the education sector. (De Stadler & Basson, 2003:321-322)

Document designers in South Africa have the responsibility to take note of the following aspects:
- the demands for document design in a multicultural context, which will be discussed in more detail below
- coping with the backlog in education with regard to writing and text skills
- the provision of continuing education in document design to a wide range of institutions and individuals outside the tertiary education sector

What are the key issues related to designing documents in a multicultural context?

In South Africa, it is easy to fall into the trap of thinking that making documents understandable for the whole population is simply a matter of providing a translation into each of the official languages. However, the reality is that we have a multicultural composition with differences that go considerably deeper than the differences in language.

Our society consists of people from different cultures who differ considerably in their views on the forms and means of communication that are appropriate in a certain context or situation. Document designers therefore have to be aware of the influence a person's cultural background can have on the way he/she perceives, understands and appreciates a document.

Practical example

A writer can unintentionally offend readers by the way a message is written, simply because the cultural values and norms of the target group were not taken into account. Therefore the communication does not achieve what it sets out to do, namely to establish effective communication between a writer/creator of a text and the target audience.

Researchers have identified a number of 'cultural dimensions' that can assist in understanding the similarities and differences in communication across cultures.

1. Individualism vs. collectivism

Researchers view individualism/collectivism as one of the most important dimensions in any culture. It has a significant influence on communication, establishing the rules according to which people communicate, but also influencing a specific person's personality, value system and concept of him/herself.

However, as is the case with other cultural dimensions, the divide is not absolute, and rather forms a continuum from collectivism to individualism. Though it is always dangerous to generalise, American and Western European cultures (especially Northern European cultures) tend to be more individualistic, while African cultures and some Eastern cultures tend to be more collectivistic.

In individualistic cultures, the interests, goals and aspirations of the individual have the highest value. Each person is seen as a unique individual with his/her own unique set of talents and potential, and the responsibilities of the individual go only as far as him/herself and his/her immediate family are concerned. People in individualistic cultures apply the same norms and values to everybody.

In collectivistic cultures, on the other hand, the advantages for the group have priority. Members of collectivistic cultures are expected to fit in with a specific group, known as the 'inner group'. The 'own' identity is considered less important than being a member of the inner group, and people who do not belong to this inner group are considered to be outsiders.

> **Individualism vs. collectivism**
>
> "The 'I' identity has precedence over the 'we' identity in individualistic cultures, and the 'we' identity takes precedence over the 'I' identity in collectivistic cultures."
> (Gudykunst, 1998:47)

Document designers must keep in mind whether the reader comes from an individualistic or collectivistic background. An individualistic person will feel positive towards a text that appeals to values such as self-respect, the self, the attainment of personal wealth, the experiencing of adventure and the safeguarding of privacy. The more collectivistic person, on the other hand, will relate more easily to concepts focusing on tradition, family, loyalty, sacrifice and duty.

Practical example (presented in De Stadler, 2002)

In March 1999, a debate about the role of the South African banking sector was initiated in Parliament, focusing on the notion that this sector did not play the role in the rebuilding of South African society that was expected of it.

What was the problem? According to newspaper reports, criticisms centred around the fact that the banking sector seemed to focus only on the well-to-do segment of the South African economy, and furthermore that the sector provided little evidence that it was truly interested in rebuilding the community.

Another specific criticism that arose during the debate was that the banking system alienated a certain segment of the South African community in the way in which it communicated, specifically with regard to cultural diversity.

During the research project that followed, it became clear that members of the collectivistic cultural group had problems with the ways in which the banks were communicating with them. There was a strong negative reaction to different aspects of the document design in the brochures, with participants voicing feelings of alienation and sentiments of 'someone speaking a language not related to my frame of reference'. Many people reacted negatively to certain design features of the texts following from attitudes and value systems related to their cultural affiliation.

Researchers in the Unit for Document Design analysed 80 brochures from different banks. The focus was on a number of text features, among them the use of culturally defined concepts from the different groups, the content of slogans, product names, the amount of content, and different aspects of style.

As far as the conceptual analysis was concerned, a strong individualistic bias was found, reflected in design features such as the following:

- A strong focus on the needs of the individual, as opposed to references to the group and the individual's position, identity and responsibilities within the group. In a few cases where brochures focused on more collectivistic values, members of the collectivistic cultures voiced strong positive feelings and felt that these brochures seemed to be the exceptions to the rule.

- A large number of references were made to the performance, achievement, accomplishment, hard work, success and gain of the individual. Members of the collectivistic cultures found that these values were stressed too much, even to the extent that they become overbearing.
- A strong focus on material wealth was found in the documents. Within the African context, where collectivism is often seen as a cultural value system following from the *lack* of material wealth, too strong a focus on personal wealth could run the danger of alienating readers. Money is seen as an instrument of support, and not merely an instrument for personal riches and well-being.
- Other lifestyle concepts typically associated with individualistic cultures, among them the concept of time constraint ('little time for this and that') and the concept of personal pleasure ('we will look after your money matters while you have all the fun') were found in almost all the texts. Very few references were made to typically collectivistic concepts such as support (for example, for your children or other family members) and the role of finances within an extended family.
- More references were made to the future (individualistic) rather than the present or the past (collectivistic).

The research project revealed that, in the majority of the cases, the brochures had a very strong individualistic character, which was perceived as an alienating force when these texts were addressed to members of collectivistic cultures.

2. High context vs. low context in communication

The cultural dimension identified as high context/low context focuses particularly on interpersonal communication. In high-context cultures, the meaning of a particular message is not only derived from the words used to convey the message, but is also 'discovered' by using information known to both the message giver and the message receiver, and by using the context and the situation.

In such a culture, a person may answer 'yes' to a certain question but actually mean 'no', and the other members of the culture would know and understand from the context and the situation that this is so.
In low-context cultures, the meaning of a message is usually deduced only from the words that are actually spoken or written, and the focus on detail is high. The cultures most notable for their low-context communication are the German, Scandinavian, Swiss and American cultures, whereas all African cultures, most Asian cultures and all Arabian and Latin American cultures make use of high-context communication.

In general, it was found that members of individualistic cultures tend to use low-context communication, while members of collectivistic cultures use high-context communication. The communication of members of individualistic cultures who use low-context communication will tend to be more direct, whereas the communication of members of the collectivistic cultures will tend to be more indirect.

A person accustomed to low-context communication might be offended by a high-context message and experience it as evasive, ambiguous or lacking in precision. A person accustomed to high-context messages might find a low-context message overbearing or too direct and the focus on detail unnecessary.

The practice in professional communication of making use of the bottom line principle, according to which the main aim or message of any communication is stated right at the outset, might then not be the right approach for people accustomed to high-context communication. It would then be wiser to take more time to prepare the reader for what is to follow.

3. Power distance

The cultural dimension of power distance describes the distribution of power among individuals and groups in a society, and how inequalities in power are dealt with. In general, power distance is a measure of the interpersonal power or influence of a person in authority (i.e. the boss) towards people below him in the hierarchy (i.e. the worker or subordinate), as seen from the perspective of the less powerful of the two.

Low power distance tends to dominate in countries such as Australia, Canada and the United States, whereas high power distance dominates in countries such as Egypt, Ethiopia, India and Malaysia. African cultures lie roughly halfway between high and low power distance.

In the research done on this cultural dimension, the following three questions were used to measure the distance between people in the less powerful and more powerful positions (Hofstede, 2001:84-86):
- How often do you experience that you do not want to differ openly from your boss?
- How would you describe the decision-making style of your boss, i.e. autocratic, persuasive/paternalistic, consulting or democratic?
- Which decision-making style of your boss do you prefer?

The results of the research showed that, in societies with a high power distance, those in the lower position feel uncomfortable when the power distance is reduced, and prefer a situation in which the power distance is maintained or even increased. In societies with a low power distance, those in the lower positions do not feel threatened when the power distance is reduced, and will even welcome or expect it.

For the document designer, this knowledge will influence decisions such as the level of formality needed for a document. For example, in a letter to an employee the power distance would determine whether it is addressed to 'Dear Peter' (low power distance) or 'Dear Mr Smith' (high power distance), and ended with 'Good wishes, John Jones' (low power distance) or 'Yours sincerely, (Mr) J.J. Jones' (high power distance).

4. Femininity vs. masculinity

The cultural dimension of masculinity/femininity focuses on the role that gender plays in a culture. In highly masculine cultures, people will value possessions, power and assertiveness; there is an emphasis on the different roles of the sexes; and high value is placed on ambition, performance and independence. In cultures high on femininity, value is placed on quality of life and the nurturing role of society. The differences between the sexes are downplayed and high value is given to service and interdependence.

In masculine societies, one would openly differ in conflicts and it is important that a clear winner emerges from any conflict. In feminine societies, people would prefer to reach a compromise, and it is more important to find consensus than to have a winner.

The Japanese culture is the best example of a masculine culture, while the Scandinavian countries and the Netherlands are good examples of feminine cultures.

Another way of defining these two cultures is to say that masculine societies are more money and things oriented (one lives in order to work), whereas feminine societies are more people and feelings oriented (one works in order to live).

For the document designer, masculinity/femininity as a cultural dimension will feature in aspects such as defining the target audience, the style and the arguments that are used.

Of course, this dimension does not only relate to national cultures of a more masculine or more feminine nature, but also to the issue of gender in everyday discourse. Once again we have to be careful: men and women do not communicate in the same way. They have different styles and relate better to different topics. Men tend to be more to the point and therefore use language as an economic tool, whereas women tend to use communication as a social tool and will therefore appreciate more detail.

> **Practical example**
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> During workshops on this topic, researchers at the Unit for Document Design asked participants to design an advertisement for a new family car. We enticed them to focus specifically on the design features that will sell the car in their particular environments.
>
> What we found, almost without fail, was that the men would focus on issues related to the performance of the vehicle, while the women would focus more on aesthetics and safety as the most important selling points.

5. Uncertainty avoidance

Members of cultures high in uncertainty avoidance have a low tolerance for uncertainty and ambiguity. They feel more comfortable with a system regulated by rules and laws, want structured organisations in which it is clear who is responsible for what, and need employees to get precise instructions on how to act and what to do. They also feel uncomfortable with a society in which people have deviant ideas and have a strong desire for consensus.

Countries with high uncertainty avoidance include Greece, Belgium, France, Argentina, Chile and countries in Africa.

People in low uncertainty-avoidance cultures experience much lower stress and anxiety about unfamiliar situations. They accept dissent as a part of life and would not feel comfortable with too many rules and too much structure. In these cultures, creativity is a great virtue and things that are different are regarded as both interesting and curious. Countries with low uncertainty avoidance include Denmark, Sweden and Great Britain (Hofstede, 1991:119).

In comparison, the great virtue in cultures with high uncertainty avoidance is accuracy. For these people, that which is different is dangerous.

For the document designer a sensitivity for this dimension can guide decisions about the specific content of a document. A document designer would, for example, know whether readers would appreciate or expect reassuring details or would find it unnecessary. Another example: Knowledge of the levels of uncertainty avoidance may influence the way in which warning and other kinds information related to fear are presented.

6. Age

A very obvious dimension of culture and a strong dividing line in the South African community is the issue of age. It is often not possible to communicate with young people in exactly the same way as with older people: a younger audience might prefer a more informal or modern style, whereas older people will react better to a more formal style of communication. However, we often misjudge these issues, as illustrated by the example below.

Practical example

In some of its Afrikaans brochures, loveLife chose a 'cool' style that included a lot of English words to create a certain look and feel:

> *OK, hier is 'n message vir die ouer mense daarbuite: 'Hou op ons toekoms op te f**!'*
> *Geen disrespect bedoel nie, maar is dit duidelik genoeg vir julle? OK, ek kan hoor hoe*
> *julle moan oor die choice of language, opgevolg deur 'n lang boring lecture oor hoe julle*
> *disapprove van die klere wat ons dra, die musiek wat ons luister, die klubs waarheen ons*
> *gaan en ons bad attitudes…*

The Unit for Document Design did some experimental research to find out how these texts are received by the target audience. The reaction was negative: the style did not ring true, was found to be 'corny', the message was viewed as alienating ('an older person trying to be like us'), and the style was not employed consistently.

Is this not stereotyping?

You may be wondering whether the cultural dimensions are generalising or stereotyping the groups that they refer to, and indeed, that could be the case, since we do tend to organise our worlds in terms of the stereotypes that we create on the basis of our own experiences.

Stereotyping relates to the perceptions that people have of those who belong to a group other than their own. Stereotypes are the characteristics we assign to people based on their being members of a certain group to which a set of specific characteristics has previously been assigned. It therefore refers to preconceived ideas in relation to a specific group of people or an individual, without taking into account that certain individuals in that group might not have the specific characteristic, value and preference associated with the group.

As a tool in writing, stereotyping should be applied with great care, and is often best used when a particular communication is aimed at a well-defined group. For example, in a women's magazine aimed at the typical career woman, advertisements would use the typical 'stereotype' for a career woman – independent, well groomed, well educated, and on equal

terms with her male colleagues. In a magazine aimed at mothers with young children, the stereotype used might focus more on the nurturing, caring role of women.

However, when using cultural stereotypes in document design, it is important to determine whether the stereotype is true, and whether it is advisable, safe, appropriate and wise to use the stereotype.

How do the cultural dimensions affect document design in the corporate environment?

In South Africa, our multicultural society is a reality that has to be taken into account whenever the process of document design is set in motion.

In the corporate environment, the first and probably most important issue is to keep any document reader-focused. This can only be done if the writer has answers to the following questions:
- Who is the audience?
- What would the audience expect from a document?
- What would the audience feel comfortable with?
- What kind of arguments would speak to the audience?
- What kind of interaction between text and image would be appropriate?
- What knowledge does the audience have and not have?
- What style and tone would be best to get the message across?

To make a sound analysis of the needs and expectations of the audience, a clear understanding of the different cultural dimensions is invaluable.

In the South African context, it would be wise to keep in mind that there might be significant differences in the way people perceive a text, depending on whether they are from a more collectivistic or a more individualistic cultural background. The choices that document designers made in this regard can have serious financial implications.

Practical example

A few years ago, a large short-term insurance company launched an extensive advertising campaign in which it focused on the decadent egotistical pleasures that the individual could get from the cash bonus paid out to its customers. Taking the values of collectivism into account, it is quite possible that the more collectivist-minded customers would have been put off by this seemingly decadent focus on personal pleasure and gratification.

This particular advertising campaign ran for about three months and was then stopped, perhaps because the company discovered that it was alienating some of its current and prospective customers. Obviously this is speculation, but our knowledge of the role of culture in communication does sound a warning: in cases like these it might just be a good idea to do some pre-testing with your intended audience.

PART 6: THE IMPORTANCE OF TESTING IN DOCUMENT DESIGN

As has been mentioned previously, document design has shifted focus from the writer to the reader, and the reader is now seen as an active participant and stakeholder in the document design process. This is especially true when considering the need for and importance of testing a document, a design phase in which the reader should play an important role. We all seem to have the perception that the testing of a document is an expensive and time-consuming activity best left to academics. But the opposite is actually true: The cost (both metaphorically and in real terms) of sending an untested document into the world can be ten or more times higher than the cost of the testing phase itself.

Organisations and institutions would benefit from pre-testing documents before sending them out to prospective readers, since this could highlight many problems and ultimately lead to cost savings.

As can be seen from the diagram below, testing forms an important part of the document design process:
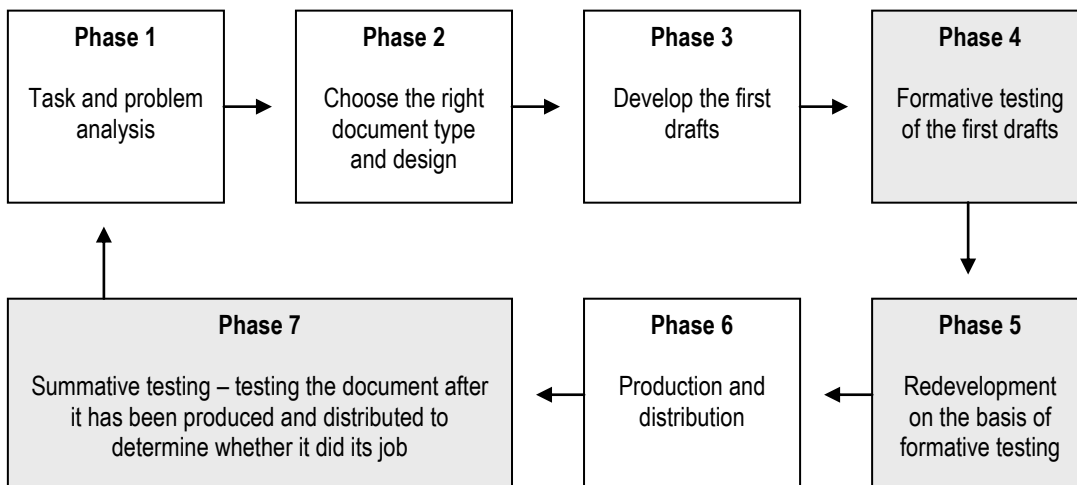
| Phase 1

Task and problem analysis | Phase 2

Choose the right document type and design | Phase 3

Develop the first drafts | Phase 4

Formative testing of the first drafts |
|---|---|---|---|

| Phase 7

Summative testing – testing the document after it has been produced and distributed to determine whether it did its job | Phase 6

Production and distribution | Phase 5

Redevelopment on the basis of formative testing |
|---|---|---|

Figure 1: The importance of testing in the document design process

When testing the effectiveness of documents, the following aspects should receive attention:
- **Attention and selection**: Will our text draw attention and be selected for reading?
- **Understanding**: Does the document make sense to the reader? Is it easy to understand?
- **Application**: Does the document lead to some kind of effect or action?
- **Acceptance**: Do the readers of the document actually find it acceptable and credible?
- **Appreciation**: Do the readers like the document?

There are also a variety of testing methods that can be used:
- **Text-focused methods**, where a skilled analyst would analyse a document in order to find the most obvious problems or potential problems. Working with a checklist of desired features is a typical method in this broad category.

- **Expert-focused methods**, where experts (document experts or content specialists) are asked to comment on the quality of the document.
- **Reader-focused methods**, where the audience become the partners in the process when they are asked to react to a document or specific aspects of a document. Typical examples would be the use of a questionnaire or participation in a motivated choice experiment where they have to choose the more acceptable of two or more document versions.

In a best practices context one should consider combining these method types, especially since they are there to complement one another. For instance: Readers do not always have the know-how to identify more specific problems in a document. It is therefore important to use text-focused methods where more specialised knowledge is added to the design process. But the opposite is also true: The best document specialist cannot always predict how reader will react to a text, suggesting that we should not only rely on the assessment of specialists, but that we must research the reactions of the reader in a systematic way.

CONCLUSION

The main problem today is that, in most institutions and companies, we have a confining, utilitarian view of the role of document design, a view that can be summarised as follows:
- Writing and document design are still seen as a marginal activity: anyone can do it and therefore nobody does it.
- It adds to costs without contributing to the quality of services and products.
- It is an annoying necessity that wastes time and money.
- It is not always appreciated for its scientific rigour, its complexity and ecological validity – the fact that it does indeed influence the lives of many people and that it does not happen by itself.

Research clearly indicates that there is a desperate need for organisations and companies to develop a new understanding of what good communication and document design actually are. Too many documents are released in the marketplace without actually knowing whether they have any chance of being effective or not and, in the process, we are left with a large number of documents that do not reach their intended targets and effects.

Are we accountable for the documents that we send into the world? We should be, since they play an important role, or should play an important role, in the lives of millions of people.

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CHECKLIST: HOW TO ENSURE SUCCESSFUL DOCUMENT DESIGN

The following checklist can be used to start a 'best practices' approach to document design in your environment, and to ensure that all the important issues and role players have been taken into consideration:

COMMENT	Y/N
PREPARATION	
Do you fully understand the process of document design?	
Do you understand the importance of testing in document design, and the various testing methods that can be used?	
Does your organisation have a document design policy in place?	
Does your organisation employ staff who are well trained in the field of document design?	
Does your organisation audit the effectiveness of your document design and communication processes?	
Does your organisation assess the costs (financial and metaphorical) of your documentation and can you relate these costs to your document design practices and policies (or lack of them)?	
AUDIENCE ANALYSIS	
Have you determined the primary reader group for your document?	
Have you determined the profile of the audience?	
Have you determined their needs, values, beliefs and attitudes?	
Have you determined whether there are secondary audiences that will read the document?	
TEXT GENRE	
Does the genre suit the circumstances?	
Have you determined whether any other genre will also be suitable?	
Have you determined whether you need to follow the traditional rules of this genre?	
CONTENT	
Are you telling the reader what he/she *needs* to know?	
Is sufficient information/content supplied?	
Have you determined whether unnecessary information/content is being supplied?	
Have you determined whether information is being provided that the specific reader group does not need?	
STRUCTURE	
Can you 'see' the document?	
Does the document use external structure instruments, such as headings, captions, bullets, etc., to make it more accessible?	
Is there a logical flow of information?	
FORMULATION AND STYLE	
Are you speaking the 'language' of the readers?	
Will the readers understand the jargon?	
Does the tone of the document fit the main goal and primary audience?	
Have you ensured that you do not use difficult words and long sentences?	
PRESENTATION	
Will the look and feel appeal to the reader group?	
Does the first look convey the correct tone/message for the document?	
Do the pictures/illustrations fit the message?	