User Experience (UX) Principles in Proposal Writing

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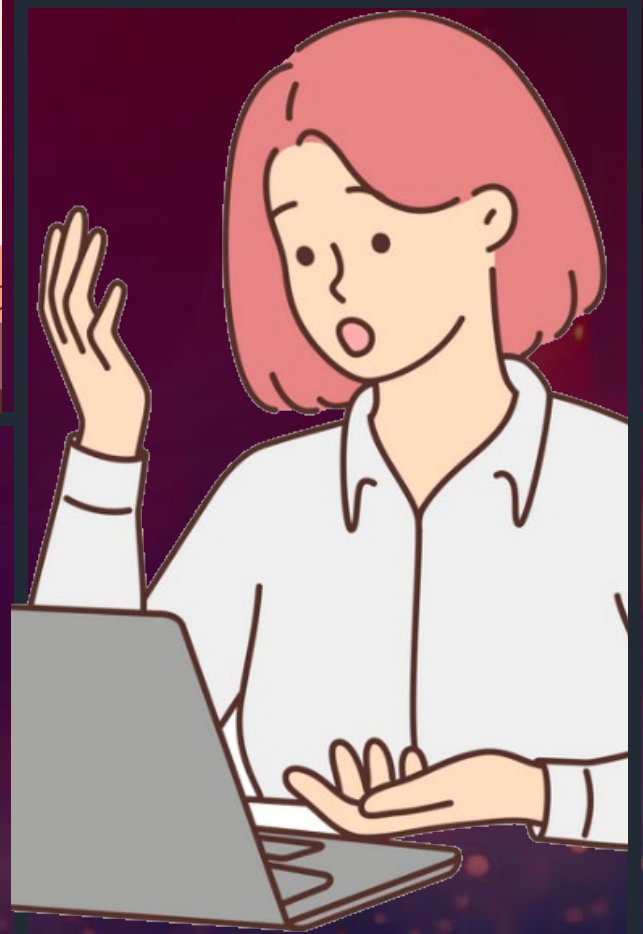
About Me

- Hi, I'm Stacey
- English and Psychology Degrees
- Corporate Proposal Specialist at CDW
- Second Time at BPC
- 15 Years of User Experience Expertise
- Background in Benefits and HR Site Research

What Are Proposal Evaluators Thinking?

What if the people reading our proposals are confused and can't find the information they want? Maybe they're overwhelmed, aggravated, or bored.



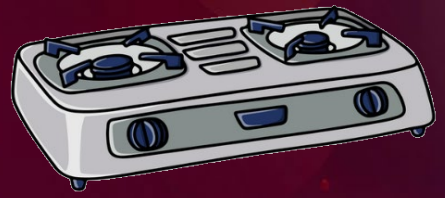
User Experience (UX) Research Helps Explain Reader Behavior

We know how **most** readers behave thanks to UX research (primarily done on websites).

We can apply these research findings and recommendations to our proposals, helping proposal readers have a **positive user experience**.

UX Research Can Be Done on Almost Any Product or Service







Researchers Want to Know…

- How do people interact with the site?
- Is the design intuitive?
- How do people process and understand the information?
- How can we improve things?
- How easily can people find what they want?

Proposals Must Be Compliant and Responsive, But Like Any Product They Must Also Be:

- Simple to Use
- Easy to Navigate
- Error Free
- Efficient
- Concise
- Pleasant
- Satisfying
- Repeatable
- Engaging

Proposals Must Be Intuitive for a…

Simple to Use

Easy to Navigate

Efficient

Concise

Pleasant

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POSITIVE USER EXPERIENCE!

UX Research Findings We Can Use in Proposals

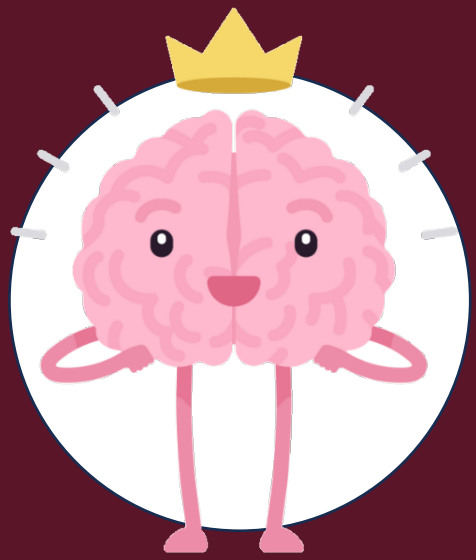
This presentation reviews UX research findings for visual design, accessibility, and interaction cost, and includes recommendations to improve our proposals.

Visual Design

How people read text and what we can do to keep proposal readers engaged

Accessibility

How to be inclusive for different types of proposal readers



Interaction Cost

How to reduce the mental resources a person uses when reading

Visual Design

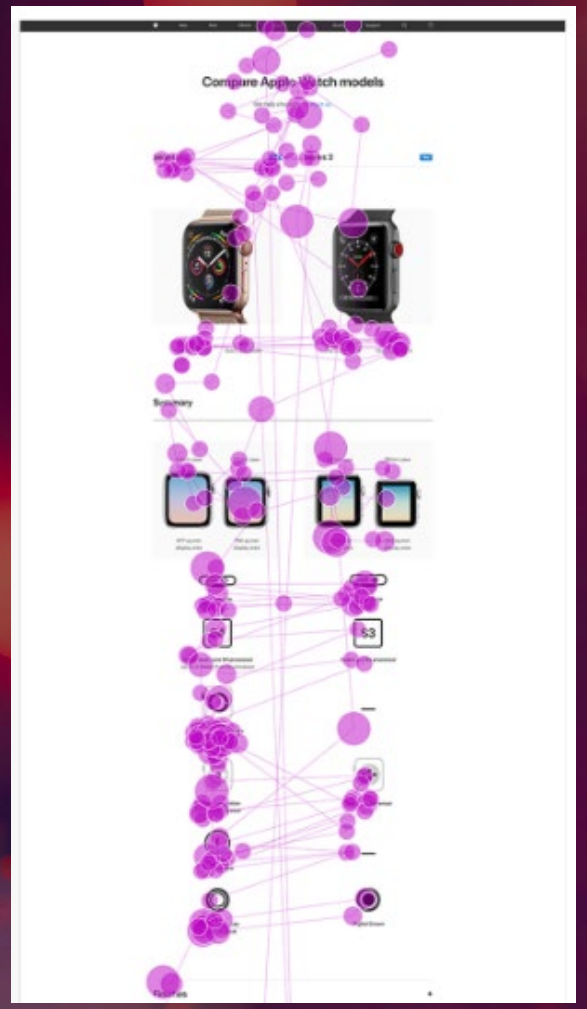
Eye Tracking Research for Text

F-shaped scanning, Nielsen Norman Group, nngroup.com

- People don't read, they scan. The blue dots show this reader focused on the top of each paragraph, with occasional blue dots scattered in other places.
- Readers tend to scan text in an F-shaped pattern. They skim sections of text for the specific information that interests them.
- For languages that are read from right to left, such as Arabic and Hebrew, the scan pattern resembles a backwards F shape.
- The F shape isn't the only pattern, but most patterns involve scanning versus reading every word.

Visual Design | Accessibility | Interaction Cost

Eye Tracking Research for Tables



Lawn mower scanning, Nielsen Norman Group, nngroup.com

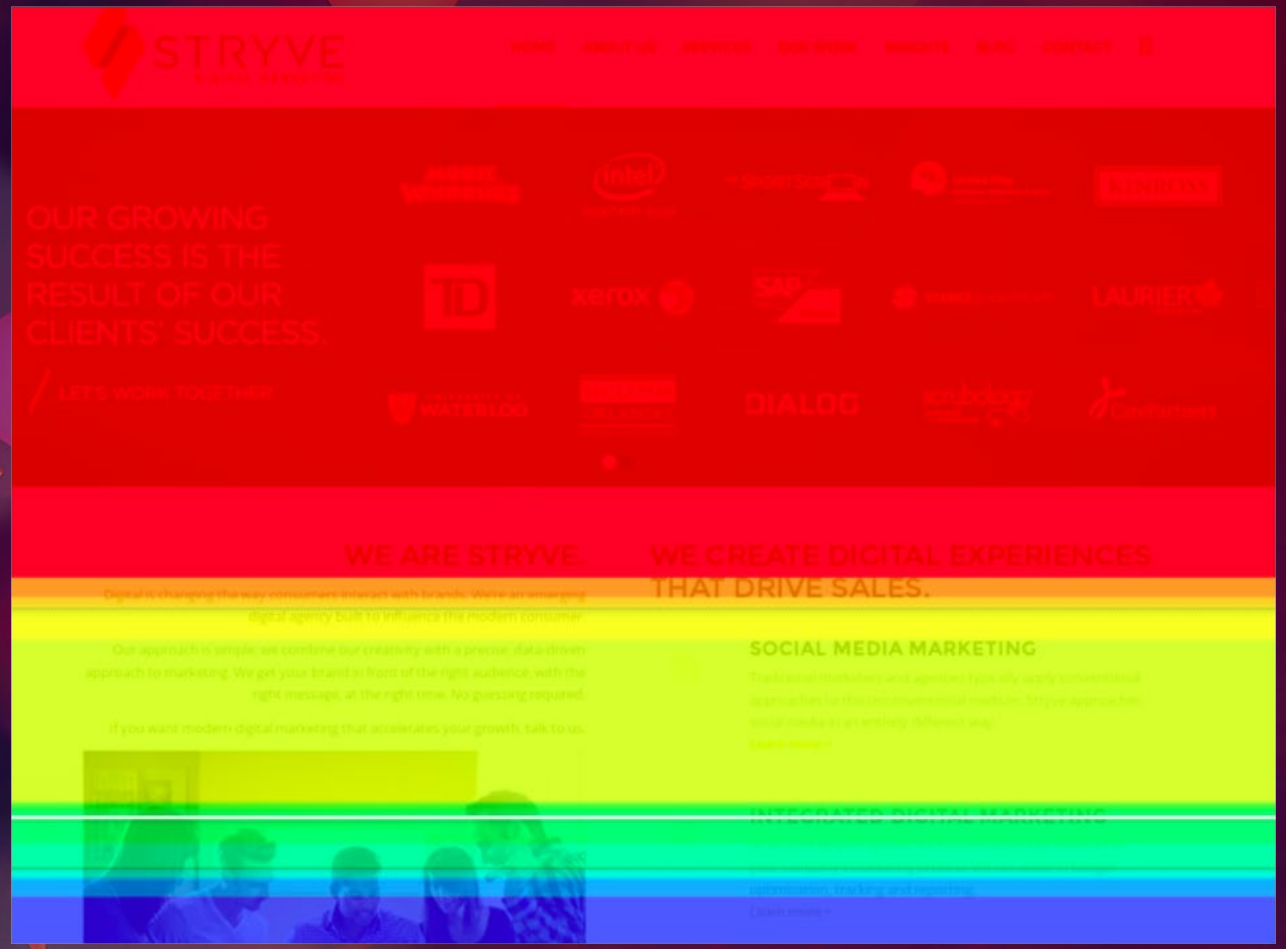
- People read tables in a lawn mower pattern, back and forth.
- This reading pattern occurs for comparison tables and text in well-defined cells.

Eye Tracking Heatmap

Heatmap example, Nielsen Norman Group, nngroup.com

- Aggregated data indicates where people focused their attention.
- Think of it like temperatures: Red (hot) areas received the most attention. Light blue (cold) areas received the least attention.
- This heatmap also resembles an F-shaped pattern because that's how readers skim pages.

Scroll Heatmap



Scroll heatmap, The Ascent via The Motley Fool.

- Scroll heatmaps show how far down readers scrolled on this webpage.
- Red means most readers saw the top section; blue means the bottom of the page had little or no attention because **readers didn't scroll down.**
- In general, readers skip the bottom section of content. That could be a big problem for proposals.

Visual Design Recommendations

Focus on the Essentials

- Avoid extra text/unnecessary images so you don’t pull the reader’s eyes away from the text you want them to read.

Visual Design Recommendations

Focus on the Essentials

Guide the Reader's Eyes with Formatting

- Readers tend to focus on headings, subheadings, and bold text. Use those to draw the reader's attention.

Visual Design Recommendations

Focus on the Essentials

Guide the Reader's Eyes with Formatting

Front-Load Pages and Paragraphs

- Put the most important information at the top of pages and paragraphs when possible. Use formatting to draw the reader's eyes down through the rest of the proposal text.

Visual Design Recommendations

- Focus on the Essentials
- Guide the Reader's Eyes with Formatting
- Front-Load Pages and Paragraphs
- Group Content into Meaningful Chunks

- Group text in a way that helps proposal readers understand its purpose. Use subheadings to break up large sections of text. Move unrelated text to other sections (people expect items that are together to be related).

Visual Design Recommendations

Photo by April Pethybridge on Unsplash.

Load and ohs

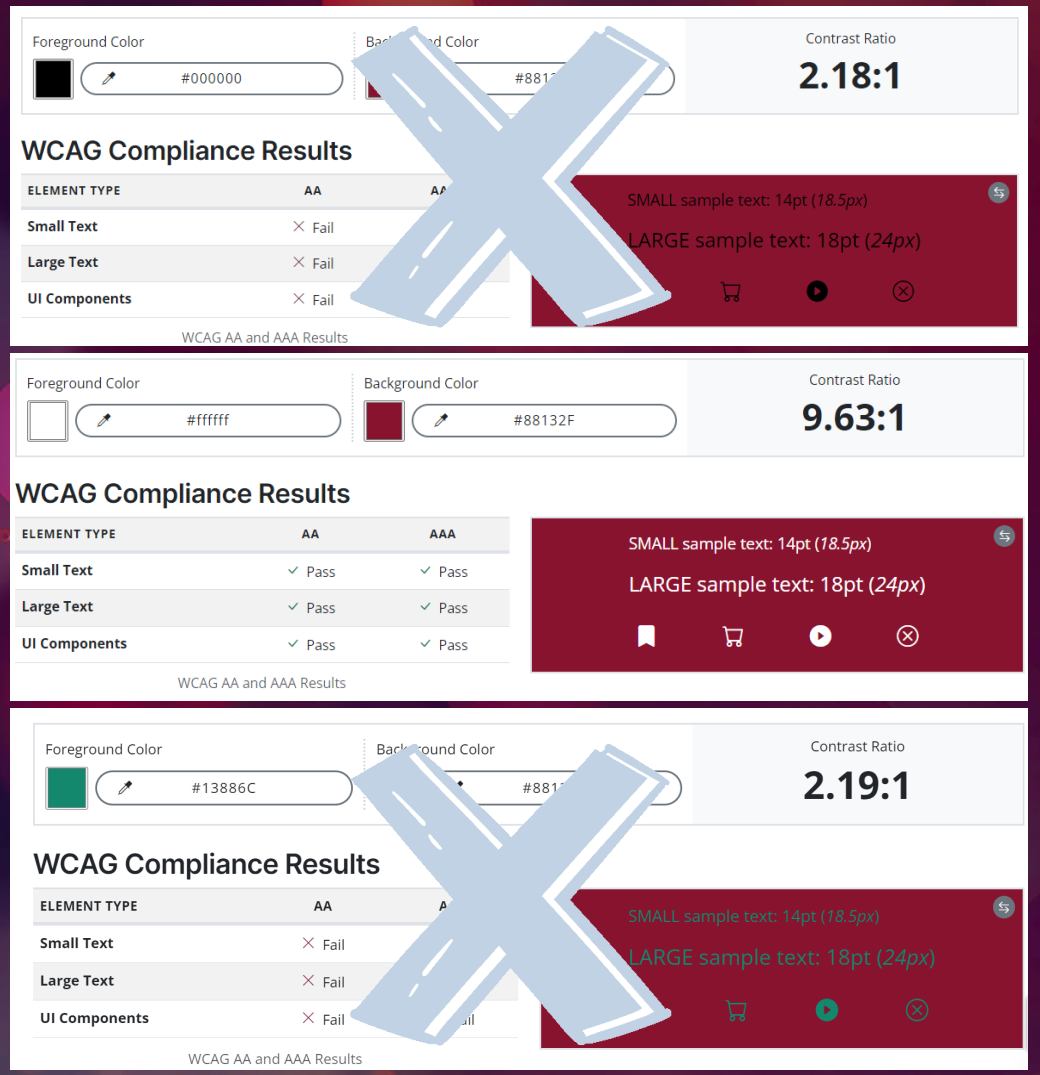
Group Content into Meaningful Chunks

Bake a Layer-Cake Pattern into the Proposal

- Some people scan headings and subheadings but skip paragraphs (a “layer cake” pattern). Use descriptive heading and subheading “frosting” to appeal to readers so they might sample the proposal “cake” under it.

Accessibility

Color Contrast



- Ensure there is enough contrast (a high contrast ratio) between the text and background.
- Try a color checker, such as Accessible Web.
- Color theory is helpful, but it isn't the best way to determine contrast.

Accessibility compliance results from https://accessibleweb.com/color-contrast-checker.

There Is No “Best” Font

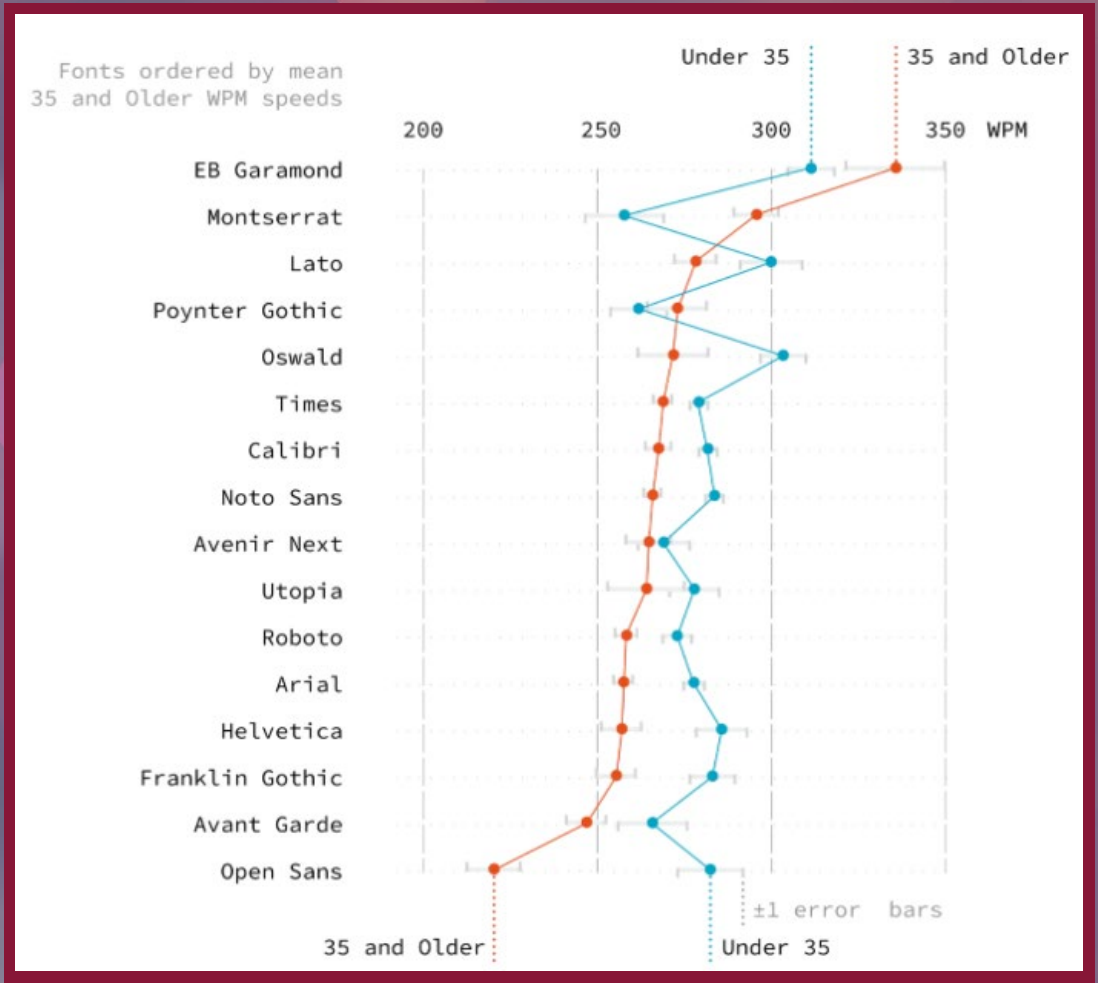
“It is a truth universally acknowledged, that a single man in possession of a good fortune, must be in want of a wife.”

— **Jane Austen, Pride and Prejudice**

“Although there is no ‘best’ font, it is a truth universally acknowledged that Comic Sans and Papyrus are definitely not in the running.”

— **Most writing nerds, correctly prejudiced against certain fonts**

Adobe’s Font Study



- Adobe’s research tested 16 fonts for reading speed and comprehension.
- Reading speed ≠ reader preference.
- Older readers tend to read more slowly than younger readers.
- Per Adobe, “Different fonts work best for different people.” There isn’t a single “best” font.

Accessibility Recommendations

Use a Contrast Comparison Tool to Check Accessibility Issues

- Make sure your proposals are easy to read for different types of readers. That means using larger fonts if the RFP allows it and making sure proposal text has enough contrast with the background.

Accessibility Recommendations

Use a Contrast Comparison Tool to Check Accessibility Issues

Provide Visual Cues

- Use visual cues that don’t rely on color. For example, if the proposal includes links, be sure those links are a different color from the rest of the text. Consider using underlined text for links only, not for emphasis.

Accessibility Recommendations

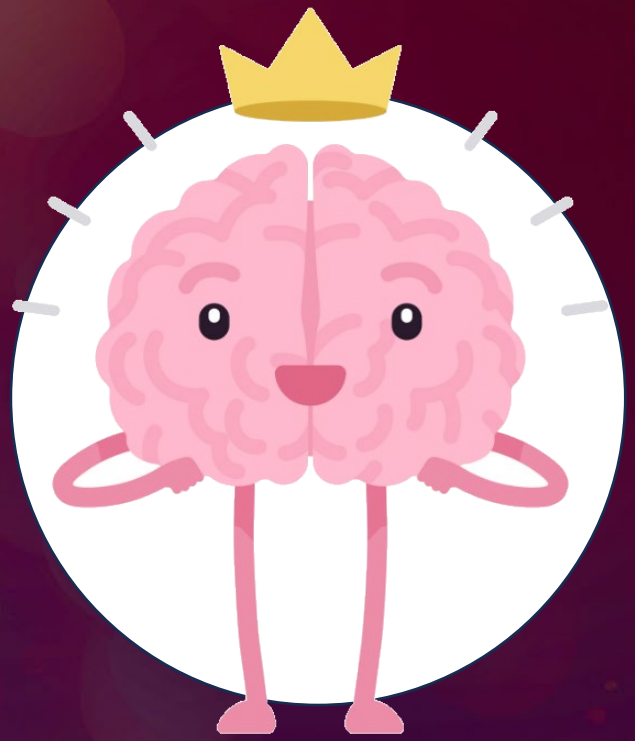
Use a Contrast Comparison Tool to Check Accessibility Issues

Provide Visual Cues

Choose Standard Fonts (Usually Microsoft)

- If you don’t already, consider using a standard font available in Microsoft products. Use a familiar font that won’t distract proposal readers and easily converts between formats, such as Word to PDF.

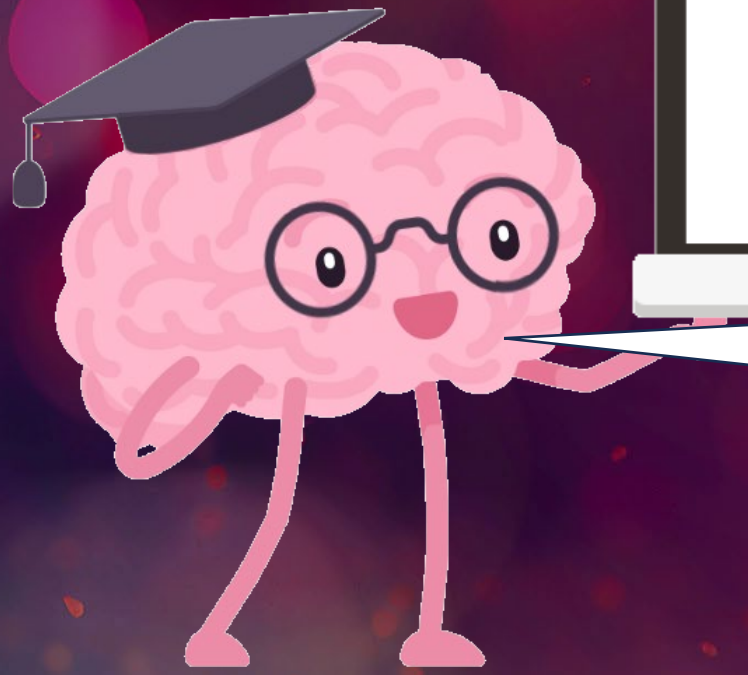
Interaction Cost



Interaction Cost and Cognitive Load

Interaction Cost: The total mental and physical efforts a person uses to meet a goal.

Cognitive Load: The mental resources required to complete a task.



Zero interaction cost **isn't** achievable because readers have to put some conscious thought into things. As proposal professionals, we need to make it as easy as possible for readers to find the information they want.

Interaction Cost and Cognitive Load

Lower Interaction Cost

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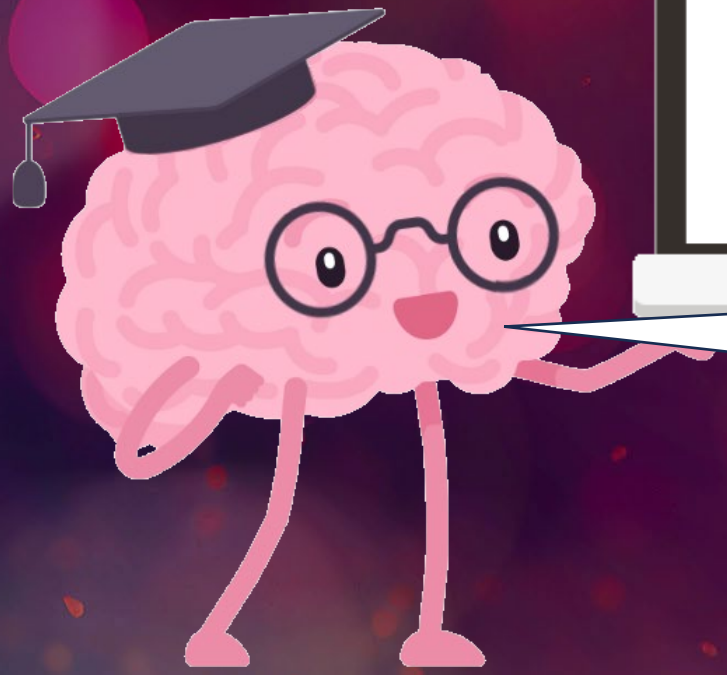
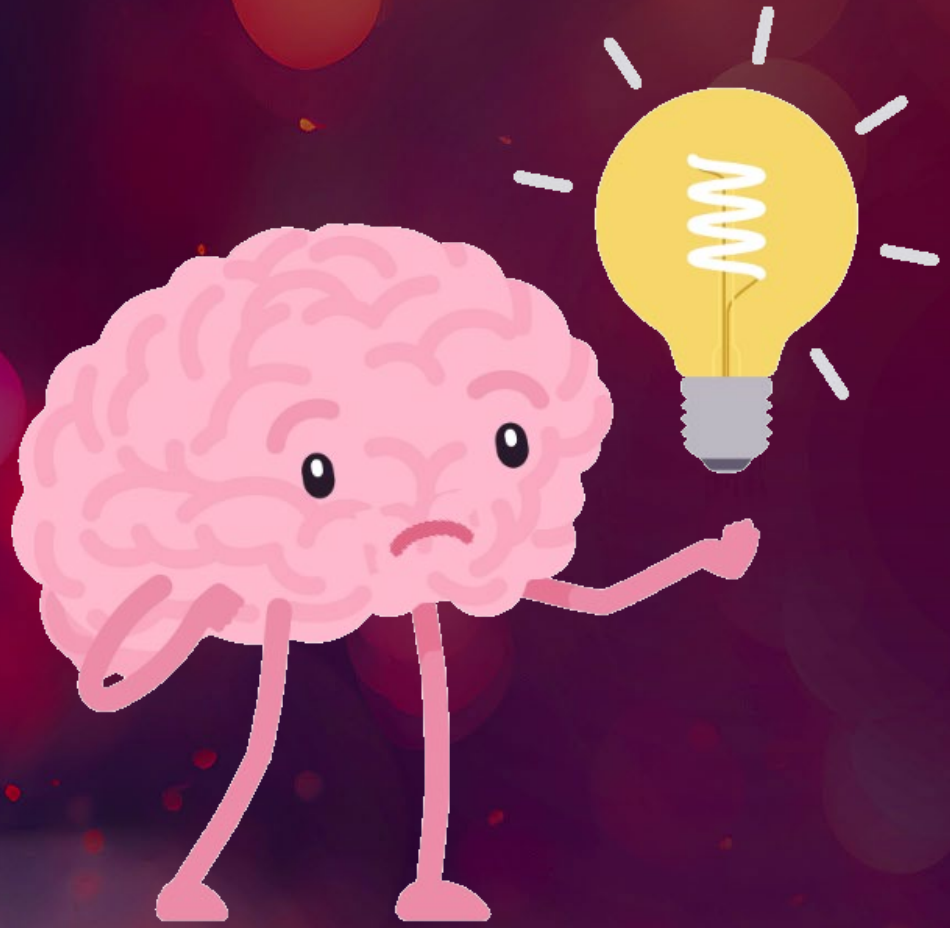
Better User Experience



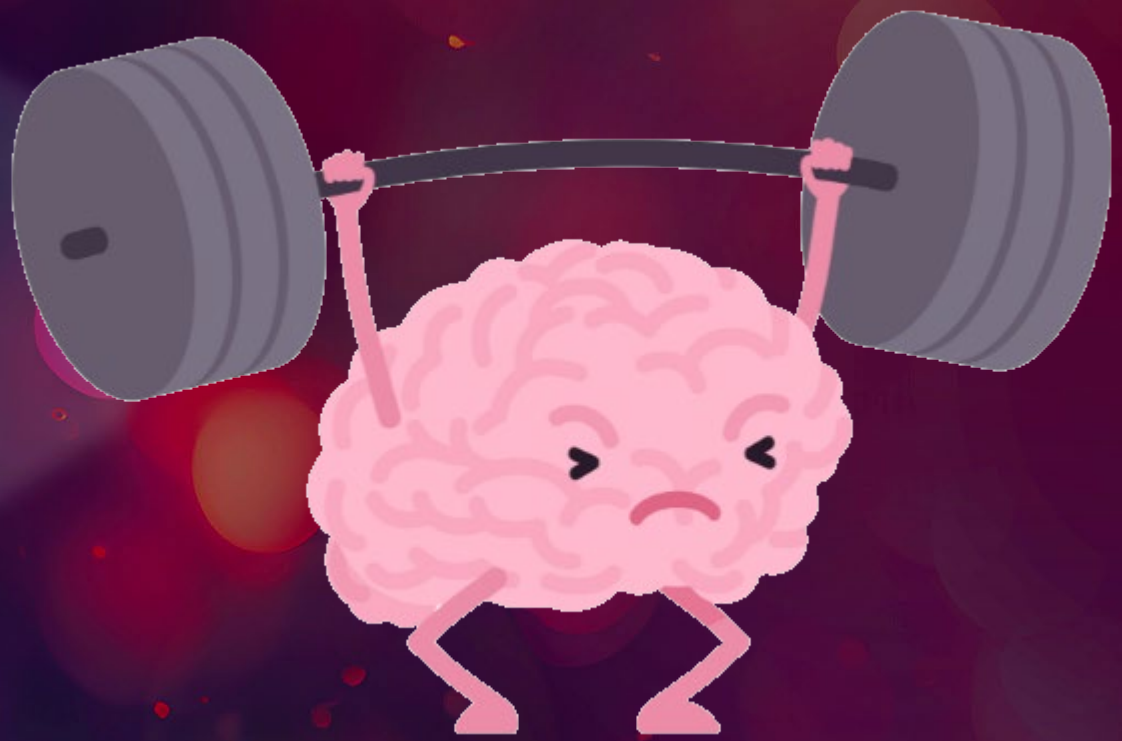
Proposal readers want to find the information they need without putting in too much mental effort. A lower interaction cost means readers get a smoother, more positive experience from our proposals.

Cognitive Load Research and Principles



- Jakob's Law: Interactions should be consistent with users' expectations. Don't force them to learn something new.

Cognitive Load Research and Principles



- Jakob's Law: Interactions should be consistent with users' expectations. Don't force them to learn something new.
- Michal Zivan, et al: A higher cognitive load is seen in screen-based reading versus reading print. (It takes more brain power to read on a screen than on paper.)

Cognitive Load Research and Principles

- Jakob's Law: Interactions should be consistent with users' expectations. Don't force them to learn something new.
- Michal Zivan, et al: A higher cognitive load is seen in screen-based reading versus reading print. (It takes more brain power to read on a screen than on paper.)
- Erik Wästlund: Scrolling a page uses more mental resources than turning a page. Turning a page is an "automatic gesture."

Interaction Cost Recommendations

Use Standard Conventions

- Use the customer’s preferred wording. Readers should be confident that you’re consistently using their phrases. We don’t want readers to pause to check their understanding of a word or concept. Proposals should be familiar and easy to navigate.

Interaction Cost Recommendations

Use Standard Conventions

Focus on Meaningful Information

- Focus on the information that is important to proposal readers. The cognitive load is increased when readers have to sift through irrelevant images, meaningless font changes, and other distractions. When you have too much information on a page or in a document, it competes for attention and readers get overloaded.

Interaction Cost Recommendations

Use Standard Conventions

Focus on Meaningful Information

Reduce Scrolling

- People scan text in an F-shaped pattern and the physical act of scrolling requires more mental resources than turning a page. Put the important information at the top of a page when you can, and use headings, subheadings, and bold text to draw the reader's eyes to the rest of the page.

Interaction Cost Recommendations

Use Standard Conventions

Focus on Meaningful Information

Reduce Scrolling

Avoid Technical Jargon

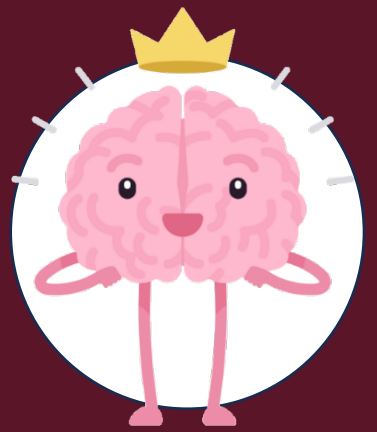
- Avoid technical jargon (when possible) so your proposal can target a broad range of reviewers and knowledge. This helps to reduce the cognitive load of readers who aren't familiar with the jargon. Provide technical details **when and where** it's appropriate.

Visual Design

Create formatted, clutter-free proposals.

Accessibility

Be mindful of different types of readers and how to meet their needs.



Interaction Cost

Write proposals that are familiar and easy to navigate.

Thank you!

Any questions?

Send feedback about this session:

Contact me at stacey.paulausky@gmail.com or LinkedIn.

Additional Information and Links

- Visual Perception of Multi-Column-Layout Text: Learn about the use of columns in running text and how readers process information.
- Eye Movements When Looking at Print Advertisements: This eye tracking study examines how people use ads versus text. Consider what this might tell us about using images/text in boxes next to running text in proposals.
- The World Wide Web Consortium: This nonprofit organization develops technical standards and guidelines for an equitable online experience. Learn more about accessibility and consider how we can make proposals equitable, too.
- Gestalt Principles: These principles of human perception help us understand how people perceive information, such as information in proposals.
- Text/Typographical Layout: This information is for the web, but it provides a good explanation for why fully-justified text might impair readability.