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Nudging people towards action.

A Behavior Change Workshop

From Recycling Right to Driving Less, Proven Ways to Nudge People Towards Action

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To get a copy of the **full presentation**, please email lindsey.maser@portlandoregon.gov.

Worksheets from the workshop are below.

Step 1: **Clarify your What, Who & How**

1. **What** action or behavior do you want people to take?

   The more specific, the better. "Use less paper" could include a lot of behaviors. "Print double-sided" is a specific behavior. "Set your printer default to double-sided" is an even more specific action (and one they only have to do once!).

2. **Who** do you want to take the action?

   The more specific, the better. "All employees" is a broad group with different motivations and barriers. "Accounting Dept." or "Executive Team" is better, if you can narrow it down.

   > ***Primary and secondary audiences***
   > *You might have a primary audience (employees) and a secondary audience (executives, office manager or property manager). The primary audience takes the action, but the secondary audience helps (or hinders) them. These audiences likely have different barriers and motivations so you'll want to customize your messaging to each.*

3. **How** are you communicating with your audience about the action?

   Ex.: Emails, staff newsletters, posters, presentations

Step 2: **Know your audience**

1. **Barriers:** What's getting in the way of their taking action?

    Ex. [common]: Time, hassle, cost, habit, misperceptions / misunderstanding
    Ex. [audience or action specific]: Bike parking is limited, changing computer settings requires permission from IT staff

    > ***Perceived barriers***
    > *If people <u>think</u> a barrier exists, it can stop them from taking the action. It's important to ask people what barriers or concerns they have, so you can address them, either with solutions or with reassurance (from a trusted messenger) that it won't happen or it's easy to work through.*

2. **Motivations**: How will they benefit from taking this action?

    Ex.: Saving time or money. Feeling that they did the right thing. Demonstrating to others that they did the right thing.

    If there are no direct personal benefits of taking the action, try to find where the action benefits something your audience cares about: Kids, jobs, sports, community, etc.

Get to know your audience

1. **Ask & observe:** The best way to learn about your audience and their barriers is to ask them directly and go where they are. Who can you talk with and where can you go to see the action in action?

   Ex. If you're trying to get your workplace to recycle more, look at where the bins are, and talk to as many people as you can: coworkers, operations staff, and janitorial staff.

2. **Go through it yourself:** Go through the steps you're asking your audience to do.

   Pretend you're someone who rarely thinks about the action or topic you're working on (biking, recycling, sustainability, etc.). Or ask someone outside the Green Team to try it out and point out anything that was unclear or a hassle.

   - ☐ Are the steps laid out clearly? Is the language easy to understand? Is it obvious how, when and where to take the action? Or did you have to re-read it a few times?
   - ☐ Go to the space: Is the compost bin near where people eat lunch? Is the recycling bin near the copy machine? Is it obvious to staff and visitors that the front desk has a bike tire repair kit and pump?

1. **Make it easy to do**

Break down the action into step-by-step instructions. Set up reminders – at the time and place where people are most likely to take the action.

2. **Make it noticeable and appealing**

Social: Are a lot of other people already doing the action? Highlight that!

Messenger: Can a well-respected peer or leader relay the message?

Connected to other interests: Does the action also benefit other things people care about, like cost savings or professional development; health or safety; kids or community; sports or entertainment?

Encourage continued action with positive feedback: Highlight when people have done the things you asked them to, and let them know the overall impact their participation made possible.

3. **Make it easy to understand**

People are busy and will likely skim written communication. You want to make it easy for them to understand what action you're asking them to do, and know what their next steps are.

When you're back at work:

- ☐ Use the checklist on the next page to improve existing communications or to help when writing new ones.
- ☐ Then ask someone (preferably outside the Green Team or your department) to take a look at the communication and provide feedback. Ask them to:
    - **(1)** Skim it (~5-10 seconds): What was it asking them to do? Why should they do it?
    - **(2)** Read it through (but only once!): Were next steps clear? Was anything confusing?

Checklist for written communication

Use this to review and improve existing or new letters, emails, posters, brochures, etc.

☐ **Easy to skim**

If someone spends ten seconds (or less!) scanning your communication, will they get the key points? Aim for a clear headline and bolded subheads above short paragraphs. Where possible, break text into short bulleted lists or numbered steps. Break up long sentences (14+ words) and long paragraphs.

☐ **Obvious call to action**

Put the action as close to the top as possible. It should be one of the first things people see.

☐ **Clear and simple language**

Avoid jargon and complex language. Use plain language and break down steps.

☐ **Your audience comes first**

Don't start sentences with information about your organization or effort. Lead with your audience: why they should pay attention, what they should do, how it will benefit them. Start with "you" vs. "we."

☐ **Warnings and benefits emphasized**

If there's a deadline, consider using red text to highlight key dates and words.
A bright blue font can draw attention to benefits ("save money" or "raise funds for this non-profit").

☐ **Icons and images replace or highlight text**

Icons and images can make a document easier to skim, since we process images more quickly than text.

<u>Do</u>: Use icons that provide easy visual cues to the reader of what they can expect from that part of the communication:

🛑 **Action required**	📝 **Sign up**	ⓘ **More info**
♻ **Recycle**	🍏 **Compost**	🗑 **Trash**

<u>Don't</u>: Add random visuals that distract from the message.

☐ **Fine print is at the end**

Move details, legal or bureaucratic language to the bottom of the communication where it can still be read, but only after you've caught the reader's attention with a clear, simple call to action at the start.