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GUIDEBOOK

Getting Past the Gatekeeper

Principles and Practices for Better Program Communications

Integrated Natural Resource Management (INRM)

Sound governance and management of natural resources are central to long-term development and resilience. Faced with the need to reduce environmental degradation while improving human well-being, solutions that effectively integrate investments in natural resource management with economic and social development are increasingly urgent. INRM promotes integrated programming across environment and non-environment sectors and across the Program Cycle. INRM supports USAID to amplify program impacts, strengthen gender equality and social inclusion, and identify best practices for integration.

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Getting Past the Gatekeeper: *Principles and Practices for Better Program Communications*

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Front cover photo: Producing Lokta bark paper at Malika Handmade Paper Pvt. Ltd. in the remote mountain town of Kailas, Bajhang District, Nepal. Photo by Jason Houston for USAID.

Back cover photo: Woman packaging Lokta bark paper in the Himalayan mountain village of Kailas, Nepal. Photo by Jason Houston.

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About this Guide

USAID is a global leader in international development, producing thousands of knowledge products each year. Every new resource we create competes for the attention of our audiences. How can we make sure that our work catches the eyes—and *interest*—of our audience members? We must first empathize with the people we want to reach and ***understand what really matters to them***.

This guide shares principles and practices from psychology, business, and human-centered design to help you connect with your audience.

How to use the guide

While many of the methods presented below can be applied in various contexts, this guide was designed to be particularly relevant for **USAID activity managers and implementing partners who create and disseminate knowledge products**. These products include reports, case studies, issue briefs, toolkits, fact sheets, learning agendas, and more.

In short, if you produce knowledge in any form, this guide can help you ***1) create something that delivers value*** to your target audience, and ***2) communicate clearly the benefits*** of what you produce.

The guide consists of three main parts:

- The **Foundation** section describes some of the challenges we face in getting the attention of our audience members, and some findings from psychology that influence those challenges.
- The **Principles and Practices** section introduces some ideas and approaches based on the human-centered design methodology that we can employ to better understand the people we seek to reach.
- The **Annexes** provide a suite of practical resources to implement those principles and practices, including checklists, boilerplate interview questions, and templates.

Contents

Foundation

- ▶ The Competition for Attention
- ▶ The Gatekeeper and the Thinker

The Competition for Attention

Challenge of Scale

Did You Know?

The USAID DEC grows by over

1,000

publications every month

USAID produces thousands of knowledge products on sustainable development each year. It can be easy for this knowledge to be lost in the ocean of information competing for the attention of audience members. To get a sense of what we're up against when we're trying to share our knowledge:

- At USAID alone, there is a massive library of knowledge. According to USAID.gov, the Development Experience Clearinghouse (DEC) currently has over **200,000 publications**.[1]
- Every year, around **12,000 new publications** are added to the DEC.[2]

Add to that an unknowable number of new documents added to the intranet and shared drives every day, and we have a veritable mountain of knowledge in the USAID ecosystem. Of course, our audience members are also bombarded with information from many other sources, all of which compete for their attention.

Challenge of Email

Did You Know?

The average click rate for email newsletters is

< 5%

Once we produce a knowledge product, we want people to see it. Since email is a primary means of reaching people, here are some quick stats on email marketing.

Email marketing companies like Mailchimp have massive data troves to analyze what works (and what doesn't) in email marketing. Every year, Mailchimp releases a study examining ***billions* of emails sent monthly** across 46 sectors, including government. Another email marketing company, Litmus, conducted a study of over eight billion emails. The findings from these studies indicate that:

- The **average open rate is 40.55%** for email newsletters within the government sector—or, in other words, *only four people out of every 10* open those emails.[3]
- The **average click rate is 4.58%** for government email newsletters—meaning *fewer than five people out of every 100 click a link* in those emails.[4]
- People spend only ***10 seconds* reading brand emails**.[5]

Of course, things like USAID newsletters aren't the same as brand marketing emails from an insurance company or mobile phone provider. But we can safely hypothesize that many of our recipients only glance briefly at the newsletters and other promotional emails we send out—*unless we* ***catch their attention***.

That's where the rest of this guide will focus.

The Gatekeeper and the Thinker

We know it's hard to capture someone's attention. This section will explore some insights from psychology that help us understand *why* it's so hard.

One Brain, Two Systems

To explain how our brains work, Nobel-prize-winning psychologist Daniel Kahneman uses the helpful analogy of a brain with two systems.[6]

System 1 is:

- **Fast**, operating nearly instantaneously
- **Automatic**, meaning we don't consciously employ this part of our brain
- **Emotional**, driven by feelings that can easily overpower reason
- **Lazy**, meaning it prefers familiar and easy tasks (note that this is not derogatory; rather, laziness is evolutionary wisdom, preserving energy for when it matters).

System 2 is:

- **Slow**, requiring time to execute calculations and assessments
- **Deliberate**, meaning we have engage it intentionally
- **Rational**, helping us to understand the world in a way that no other animal can
- **Quickly tired out**, in the sense that we can't engage in deep, rational analysis for too long before we have to disengage and move on to something less taxing.

We tend to identify with System 2, as it is the source of our conscious reasoning. We see ourselves as the driver, making rational choices as we go about our lives. However, System 1 is in control more often than we'd like to admit, given its speed and automatic nature.[7]

Both systems ultimately play a critical role in our ability to function in the world. As Kahneman describes,

> *"System 1 runs automatically, and System 2 is normally in a comfortable low-effort mode, in which only a fraction of its capacity is engaged. System One continuously generates suggestions for System Two: impressions, intuitions, and feelings. If endorsed by System Two… impulses turn into actions."*[8]

To make it easier to relate to how these systems influence communications, this guide personifies System 1 as the "**gatekeeper**" and System 2 as the "**thinker**." Recognizing System 1's role in generating first impressions, if we want to connect with System 2's capacity for reason, we must first convince the gatekeeper we are worth the thinker's time.

Understanding the gatekeeper

Our audience members are constantly making instant judgments of the information in front of them, guided by the unconscious question: "Does this help me or hinder me?"

To get past the gatekeeper, it helps to understand how it operates.

This part of our brain's functionality arises from the ancient, super-fast, prerational brain that helped our ancestors survive for millions of years. Our ancient ancestors' survival relied on a brain refined by hundreds of millions of years of prior evolution. That brain had to make instant, life-or-death decisions every day. Many of those decisions came down to a binary question:

> *"**Approach** or **avoid**?"*

From the viewpoint of evolution, we approach things that appear to be opportunities, hoping to enhance our survival or reproductive fitness. And we avoid apparent threats, seeking to stay alive and pass on our genes. In other words, "approach and avoidance" is a "set of responses that **increase the probability of a desired outcome**, or **decrease the probability of a negative outcome**."[9]

Our audience members, thus, are responding to the emails and social media posts with this ancient mechanism guiding them. "Should I open (in other words, *approach*) this newsletter—or delete it (*avoid*)? Does this help me achieve my goals or hinder me?" These questions are happening faster than the speed of thought.[10]

The heart of communication is recognizing and responding to the gatekeeper's instant judgments in a way that connects with that person's values, beliefs, and needs.

To get a sense of how this instantaneous judgment system plays out, researchers have shown that:

- People often form **first impressions of other people in *one-tenth of a second***.[11]
- Impressions between **6 and 30 seconds** are highly predictive of evaluations of teachers by their students months later.[12]
- A ***one-second* exposure** to political candidates's faces led to inferences of competence that were highly predictive of the outcomes of congressional elections.[13]

We all make these snap judgments every day, all day. Whenever we open our inbox or see a social media post encouraging us to check out an article, we instantaneously judge those invitations for our attention.

If the gatekeeper sees something of value—an opportunity to achieve goals—the thinker will step in and take a deeper look.

The heart of communication involves recognizing and responding to the gatekeeper's instant judgments in a way that connects with our audience members' values, beliefs, and needs—so that we can get the thinker's attention.

The rest of this guide will present some principles and practices to help you leverage these ideas as you set out to design and disseminate knowledge products.

Principles and Practices

- ► Understand
- ► Create
- ► Test and Refine

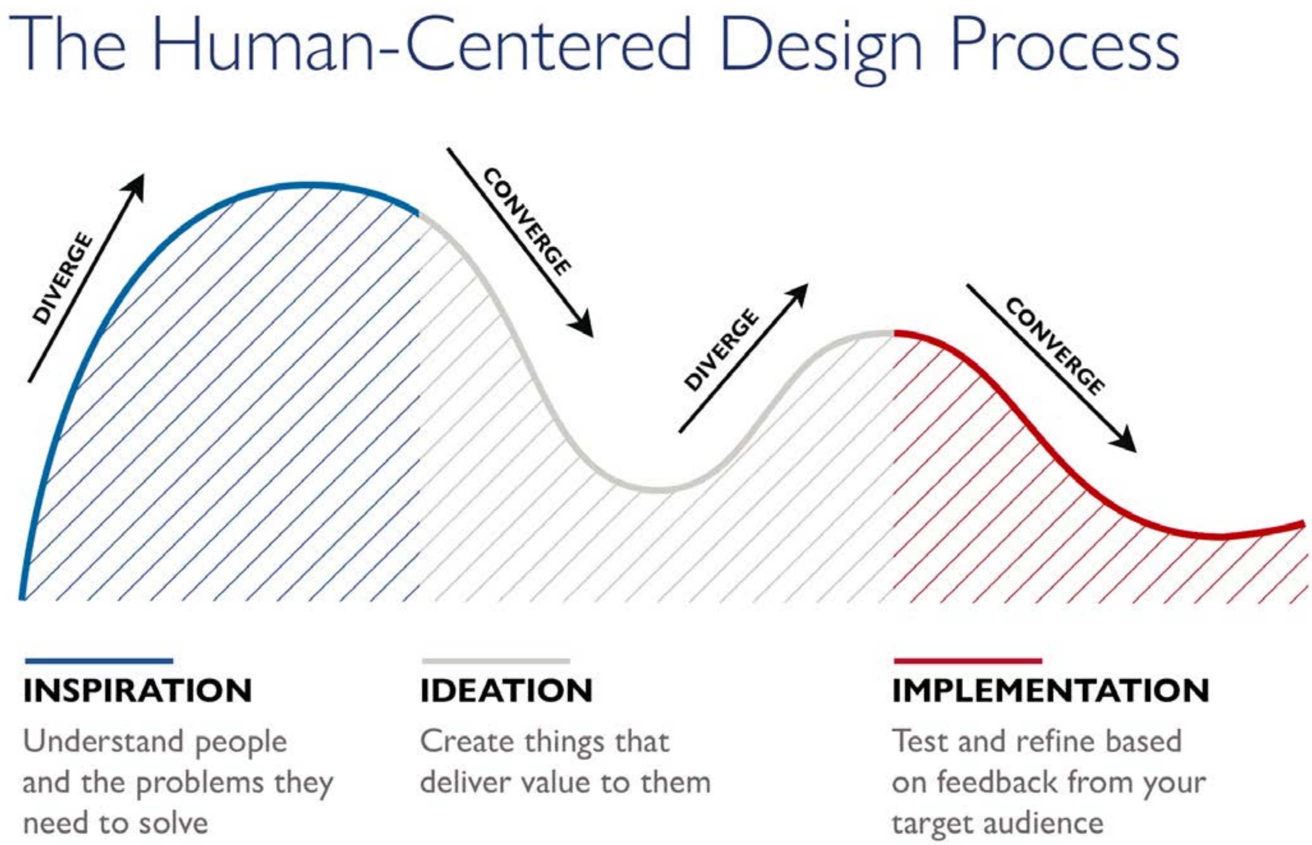


Figure 1: The Human-Centered Design Process. Adapted from IDEO.org.

Many of the following ideas arise directly or indirectly from the practice of ***human-centered design***.

Human-centered design is both a guiding principle and a formal methodology that helps us **understand people** and produce things that **deliver value** to them.

As a **guiding principle**, human-centered design encourages us to remember that we are communicating with human beings who have distinct life experiences, values, beliefs, frustrations, goals, and dreams.

The **formal methodology** typically follows these three stages:

- ***Inspiration:*** Seeking to *understand* our audience members
- ***Ideation:*** Designing and *creating* things that (hopefully) matter to them
- ***Implementation:*** *testing and refining* those things based on audience feedback

This guide includes practices from each stage of the human-centered design methodology.

Understand

"Success starts with understanding your [audience]."

Giff Constable, author of *Talking to Humans*

First and foremost, human-centered design encourages us to understand—and ***empathize with***—our audience members. The process helps us ask some crucial questions before we get started with the long process of producing knowledge resources:

- Is this tool or resource something the audience really needs?
- Will it help them achieve their goals?
- *Does it trigger the "**approach**" response?*

The following methods are relatively low-effort but high-reward means of putting the human-centered design process into practice.

Good practices for audience interviews

Audience research interviews are a vital tool for understanding people's needs—ideally before setting out on the often long process of producing a knowledge product. Talking to people about their values, day-to-day experiences, hopes, and frustrations can provide rich insights into how the product we intend to create might support their needs. At times, it can lead us to adapt or even pivot on a solution we think is a great idea — until insights from our audience interviews demonstrate that a different approach might be better.

The interview approach described here will provide data to create profiles of key audience segments. The data can also inform the creation of value proposition canvases described below.

These kinds of interviews typically look at the following aspects of your audience members' work:

- **"Jobs-to-be-done,"** or in other words, the tasks they do all day
- **Problems** they want to solve
- **Desired gains**—aspirations that will help them get ahead
- **Current alternatives**—ways they currently address these needs
- **Frustrations or difficulties** with their existing solutions
- **Benefits** of their existing solutions
- **Values and beliefs**—what really matters to them

See **Annex 1** for a checklist to guide the audience interview process and a template with some generic sample questions you can adapt.

Persona profiles

Persona profiles convey essential insights about your audience, typically in one page or less.

Marketing professionals often create a document called a "persona" to capture essential insights about target audience members. These profiles help a team better ***understand*** **and** ***empathize*** **with the people they're trying to reach**. Each profile document compiles short summaries of the persona's jobs-to-be-done, pain points, desired gains, and values.

We can refer to these profiles to help us humanize our communications and outreach efforts. They remind us that the people we're trying to reach (and serve in some way) are human beings with distinct needs and experiences.

Persona profiles don't have to be an exhaustive study of the person or role. One page is often sufficient to capture valuable information about the persona. And personas shouldn't take long to produce—conducting a 30-minute interview with someone can yield a treasure trove of insights.

See **Annex 2** for a persona profile template and an example profile of a USAID Mission Program Officer.

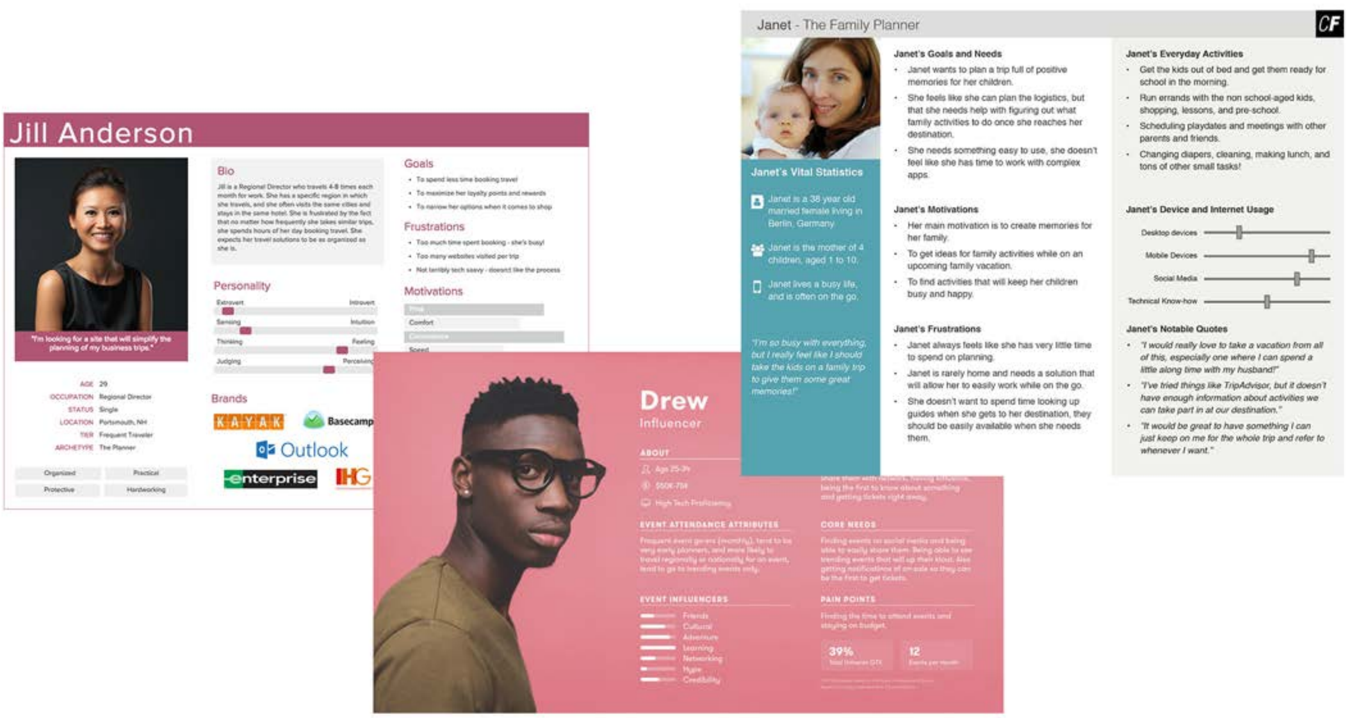
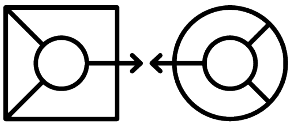


Figure 2: Examples of persona documents used by businesses to inform their marketing efforts.



The VPC links insights from persona profiles with specific elements of your products or services.

Learn More

Check out strategyzer.com for more info on creating and using the VPC.

Applying the Value Proposition Canvas

As a next step in understanding and connecting with our audience, we can fill out a Value Proposition Canvas (VPC) for each audience segment. The VPC arose in the realm of startup business to help new businesses design products that **meet a verifiable market need**. The tool is designed to cultivate a deep understanding of the **jobs** that prospective customers need to do, their **goals**, and the barriers that stand in the way of their success.

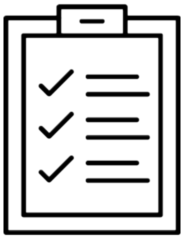
The VPC links the insights captured in the persona profile with specific elements of our products, services, or other solutions. The tool consists of two parts: the Audience Profile and the Value Map. The **Audience Profile** concisely summarizes key insights about the persona's jobs-to-be-done, pain points, and desired gains. The **Value Map** describes relevant characteristics of the solutions we are promoting for a given audience. The value map aims to link directly to the jobs, gains, and pains identified in the persona profile.

The VPC helps us to ***avoid producing something nobody wants***, thus saving time and money on efforts that aren't likely to capture people's interest. We can also use them to reframe and communicate our efforts in a way that genuinely connects with their needs.

See **Annex 3** for a VPC template, a series of questions to help you fill out the canvas, and two examples of filled-out canvases.

Figure 3: The Value Proposition Canvas. Source: Strategyzer.com

Create



Apply an understanding of your audience members to create messages that resonate with their needs.

Once we have a solid understanding of our audience, we can use that knowledge to create compelling content. The following resources can serve as guidelines for producing messaging and narratives that speak to your audience's needs.

4 ACES Messaging Checklist

The following communication principles can help you create messaging that resonates with your audience members—and stays with them long after they first hear the message.

4 quarters: *Distill the big ideas.*

While the dollar value is the same, no one wants a pocket full of pennies. This is also true of communication. Our brains can only take in and recall so much information. Think quality over quantity. Help your audience by distilling **three or four big ideas** for them.

Audience-centered: *Tune into WIFM radio*

If something is going to grab someone's attention, it must be relevant to their needs. Your audience is constantly asking the question: "What's in it for me?" (WIFM). In other words, they want to know how your email, product, service, or program helps them. To get their attention, we have to convince them of the direct value to their life and work. And different audience groups have different needs. Frame your messages accordingly.

Concrete: *Paint a picture. Be precise, clear, vivid.*

Our work in development inevitably involves abstraction. We swim in a sea of acronyms and jargon. *"To achieve our DOs, we must focus on good NRM using NBS and NCS and also WASH, and measure progress with integrated ME&L."* But even with well-informed audience members, it's easy to get lost and exhausted swimming in that sea. Concrete and descriptive language grabs our audience by the hand and guides them.

Emotional: *Consider the power of emotion.*

We still use the same "mental operating system" that our ancient ancestors used. That part of our brains is fast, powerful, driven by emotion, and makes judgments faster than the speed of thought. Many of those judgments are binary: approach or avoid, friend or foe, helpful or harmful. In this way, the ancient part of the brain serves as a gatekeeper. However factual, accurate, and useful the information is, if the gatekeeper doesn't see direct relevance to its needs, it will tune us out.

Simple: *Use shorter and fewer words.*

Try explaining your work to an older family member—can you do so in a way that makes sense to them? The more complex your language, the harder it is for your audience to follow. Keep messages simple. Use shorter and fewer words. (**TIP:** Try one idea per sentence!)

See **Annex 4** for a downloadable checklist to help you apply these principles.

Leverage the power of storytelling to keep your readers' interest.

Learn More

See *Houston, We Have a Narrative* by Randy Olson in Annex X for more information on the ABT Framework.

And, But, Therefore Framework

Creating (and resolving) conflict

Good writing has ***conflict***, a problem or barrier that needs to be addressed. However, writing within technical projects can easily get bogged down in the details of the work—missing the crucial "so what?" for the reader. To create more engaging content, we can apply the "And, But, Therefore (ABT) Framework." This simple narrative structure can be applied to a variety of formats to introduce conflict—and demonstrate how we might resolve it.

And, and, and…

Given the depth and complexity of the kinds of projects we work on, the details quickly build up. When we set out to describe the work, it's too easy to list out each and every detail. However, it's also too easy for the reader (or listener) to get *lost in those details* and quickly tune out. When that happens, we often lose our opportunity to convince them of our work's value.

And, But, Therefore

The ABT narrative template can be considered "context, conflict, and consequences," or "thesis, antithesis, synthesis." ABT consists of:

- **And:** Set up the context, including "the way things are now," goals or ideal state, or other contextual details.
- **But:** Introduce the conflict, challenge, or barrier that stands in the way of success or otherwise inhibits progress.
- **Therefore:** Describe the solution being presented, the consequences/outcomes of implementing the solution, or the consequences of inaction.

ABT in action

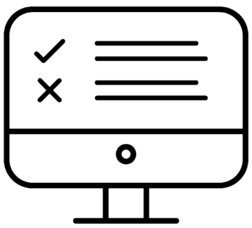
The first two paragraphs in this section were structured using the ABT template. Here is an example of what this can look like in the development context:

> *"An inclusive development approach ensures that all people can participate fully and benefit from development efforts. However, women and girls, Indigenous Peoples, and other marginalized communities are frequently disadvantaged in managing the natural resources they need to live a healthy and productive life. INRM supports USAID to address these inequities through systemic evaluation, rigorous evidence analysis, and thoughtful research methods."*

Note from the second paragraph and the sections on the first page that it's not necessary to include the words "and, but, therefore" as part of the structure. Rather, ABT can be applied more subtly to introduce the context, conflict, and (re)solution.

See **Annex 5** for a checklist to help you apply the ABT Framework.

Test and Refine



In this third stage of audience-centered communication, we test our content with audience members and learn from them how we can improve. There are many approaches to testing and refining content. This guide focuses on user experience (UX) and usability testing—a systematic and flexible method of collecting insights from your audience.

Watch people use your product or service to learn what works and what doesn't.

User experience (UX) testing practices

While UX and usability tests are most commonly associated with testing website or mobile designs, they can easily be adapted to test any number of resources. The basic idea is to **watch people use a prototype or draft of your product** and **compile insights about *what works* and *what doesn't***.

What's the difference between *usability* and *UX*?

Usability

...refers to objective facts about how easily people can use a product or resource. Can they *find information* that's valuable to them? *How long does it take them* to find it? Do they identify *clear calls to action* or ways to apply the knowledge?

User Experience

...looks at their subjective experience—how they felt while using your resource. Did they get frustrated? Did it make a light bulb go off for them? What was their experience like from start to finish?

The Nielsen Norman Group, a leading firm in the realm of UX design, says that "Five 30-minute tests can unveil the majority of issues" with the resource being tested. These issues include points of confusion, doubts about relevance, unclear navigation or content organization, and other issues.

See **Annex 6** for the "UX Testing in a Nutshell" cheat sheet with some questions and considerations to guide your tests.

Learn More

For more ideas, scripts, and other UX testing resources, visit sensible.com

Annexes

1. Audience Interviews
2. Persona Profiles
3. The Value Proposition Canvas
4. The 4 ACES Messaging Checklist
5. The "And, But, Therefore" Checklist
6. UX Testing in a Nutshell
7. Recommended Reading

Annex 1: *Audience Interviews*

- Checklist: Good Practices for Audience Interviews

- Sample Interview Questions

Checklist: Good Practices for Audience Interviews

☑ Meet them where they are.

Both literally and figuratively. Wherever possible, meet with and survey interviewees in their own space—whether in their community, workplace, or other setting that is familiar and comfortable. Be aware of any preconceptions you might have about them, as these can influence the way you interpret their statements. Listening with an open mind and open ears can help to put them at ease. Also be sensitive to the participants' culture; for example, be aware of and try to mitigate any challenges experienced by critical populations like women and girls who might participate in the interviews.

☑ Hear it in their own words.

It's best to hear interviewees' own words as much as possible—and to convey their words directly in your notes. If working with translators, ask them to translate verbatim. It's always better to capture direct quotes that accurately reflect the person's experiences.

☑ Progress from general to specific.

For your interview questions, start with general questions that are easy to answer to start the conversation and warm people up. Then gradually work toward more specific questions, digging deeper into their frustrations, aspirations, values, and beliefs. And an important note: it's always best to ask open-ended questions, rather than closed questions that can be answered with "yes" or "no."

☑ Set up for synthesis.

To make it easier to synthesize interview insights afterward, consider organizing your questions to gather information about the following categories, at a minimum: daily jobs, pain points (frustrations), desired gains (aspirations), and their values and beliefs. While there is likely additional information you will want to gather, these categories are a useful starting point for designing communication and collaboration activities.

Sample interview questions

The following interview questions can provide a starting point for planning your interviews with stakeholders. The questions are organized to help you create persona profiles. Adapt the questions to suit your context.

Interviewee:	
Role:	
How long in job:	
Location:	

General and "Jobs-to-be-done"

What is your job? Can you please give me a short description of your role?

Can you walk me through a common day?

As a [role], what do you like most? Why?

As a [role], what do you like least? Why?

Specific Tasks

Would you say you have a specialty, or a particular kind of project you do?

Tell me about the last project you worked on. Who else was involved?

What was hard or easy about the project?

Job Processes

In an ideal world, how would [project type] be done? How are things done now? How is that different?

Can you tell me about your process for [task]? What's the first thing that happens? What happens next?

Pain Points/Frustrations

What's hard about [specific task]? What's hard about completing [task]?

What's hard about ensuring [guidelines/specs are met]?

What are the top five hardest things about [area of interest]?

Gains/Aspirations

What are the top five things you want to do better this year [in your projects]?

What would the best possible future look like for [your projects]?

Values and Beliefs

Why did you get into this line of work?

What are the most important things in life to you? Why?

If you didn't have to work, what would you do each day? Why?

What kinds of beliefs or practices help you in your life and work?

See Applying the Value Proposition Canvas below *for additional ideas for planning and synthesizing interviews.*

Annex 2:
Persona Profiles

- Persona Profile Template
- Example Persona

Persona Profile Template

General Information

PHOTO *(FICTIONAL OR REAL)*	**Name** *(fictional or real)*:	
	Job title:	
	Age:	
	Education:	
	Preferred channels:	
	Location:	
	Tools they use to do work:	
	Reports to:	

Their WIFM? *("What's in it for me?")*

Values and beliefs:	
Jobs-to-be-done:	
Pains:	
Gains:	
Notable quotes:	

Example Persona

Name *(fictional)*:	**Pamela Ochoa**
Job title:	Mission Program Officer
Age:	46
Education:	Master's degree in international economics
Preferred channels:	Email, Google Meet
Location:	Latin America
Tools they use to do work:	Email, Google Docs, Sheets, and Slides
Reports to:	Mission Director

Jobs-to-be-done:	• I spend a lot of time responding to taskers, data calls, and requests for information. • I sit in on technical team staff meetings to hear what they're doing, figuring how to support them. Reminding them of things they may not be thinking of. • I do a lot of cat herding—ensuring I have the right info. Asking people to "put things here in this format." I edit heavily, simplifying jargon, etc. • We have a big agricultural component with some places that are lagging. We're trying to figure out how our env team can address these issues across all activities.
Pains:	• Doing our midcourse stocktaking now, and we're finding it challenging. All these new policies and frameworks are coming out to review. We've only just finished. But I'm sure as soon as we do this, it's all going to get stopped and we'll be asked to do other things to align with new policies. • With an exercise like aligning Mission activities with a new policy like the climate strategy, a big challenge is not having someone who has the right technical expertise that can brainstorm with us. • Program officers (also mission directors, deputy directors, and other office directors) get pulled in 500 different directions all the time.
Gains:	• What's helpful for a program officer is to receive the data that says, "This is a question, or this [activity] is important for this [result] and can be transferred across all these types of activities." • The program office is looking at a whole portfolio of issues, so it's helpful to have a team of technical experts and working groups to think through the details of what we'll be doing. • It's very helpful having someone to remind me of the resources we have, who can facilitate brainstorming, who can be involved in reviewing a strategy, etc.
Notable quotes:	"We need the evidence for [this] particular issue … because the program office is meant to be providing the data that's lacking, for when you're designing and thinking about your development problems."

Annex 3: *The Value Proposition Canvas*

- Blank Value Proposition Canvas (VPC)
- Tips for Filling out the VPC
- Frequent VPC Mistakes
- Example VPCs

Blank Value Proposition canvas

VALUE PROPOSITION		AUDIENCE PROFILE	
Product & Features	**Gain Creators**	**Gains**	**User Jobs/Tasks**
	Pain Relievers	**Pains**	

Tips for Filling out the Canvas

The following questions[1] can help you to fill out the Value Proposition Canvas—and more importantly—can guide you to a much deeper understanding of your audience and how your product, service, or other solution might help them. Some general tips:

- **Start on the right side of the canvas**, the "audience profile." Doing so forces you to think first of your stakeholder and their needs—rather than our needs.
- When considering "gains" and "pains," consider both the **"practical/rational"** and **"emotional/ intuitive"** aspects of people's experience. Emotion drives human decision-making, not just our pragmatic needs and rational judgment.

Audience Profile

Audience jobs/tasks

1. What is the one thing that your stakeholders couldn't live without accomplishing? What are the stepping stones that could help them achieve this key job?
2. What are the different contexts in which your stakeholders operate? How do your stakeholders' activities and goals change depending on these different contexts?
3. What do your stakeholders need to accomplish that involves interaction with others?
4. What tasks are your stakeholders trying to perform in their work? What functional problems are they trying to solve?
5. Are there problems that you think stakeholders have that they may not even be aware of?
6. What emotional needs are your stakeholders trying to satisfy? What jobs, if completed, would give them a sense of self-satisfaction?
7. How do your stakeholders want to be perceived by others? What can they do to project those qualities?

1 These questions and the "Frequent VPC Mistakes" below were adapted from https://platform.strategyzer.com/resources

8. How do your stakeholders want to feel? What do they need to do to feel this way?

9. Track your stakeholders' interaction with a product or service throughout its lifespan. What supporting jobs surface throughout this life cycle? Do they switch roles throughout this process?

Audience Pains

1. How do your stakeholders define "too costly"? Is it that it takes a lot of time, costs too much money, or requires substantial effort?

2. What makes your stakeholders feel frustrated? What are their annoyances, barriers, or things that give them a headache?

3. How are current value propositions underperforming for your stakeholders? Which features are they missing? Are there performance issues that annoy them or malfunctions they cite?

4. What are the main difficulties and challenges your stakeholders encounter? Do they understand how things work, have difficulties getting certain things done, or resist particular jobs for specific reasons?

5. What negative social consequences do your stakeholders encounter or fear? Are they afraid of a loss of face, power, trust, or status?

6. What risks do your stakeholders fear? Are they afraid of financial, social, or technical risks, or are they asking themselves what could go wrong?

7. What's keeping your stakeholders awake at night? What are their big issues, concerns, and worries?

8. What common mistakes do your stakeholders make when trying to use your product or service? Are they using it the wrong way?

9. What barriers are keeping your stakeholders from adopting one of your value propositions? Are there upfront investment costs, a steep learning curve, or other obstacles preventing adoption?

Audience Gains

1. Which type(s) of savings would make your stakeholders happy? Which savings in terms of time, money, and effort would they value?

2. What levels of quality do they expect, and what would they wish for more or less of?

3. How do current value propositions delight your stakeholders? Which specific features do they enjoy? What performance and quality do they expect?

4. What would make your stakeholders' jobs or lives easier? Could there be a flatter learning curve, more services, or lower costs of ownership?

5. What positive social consequences do your stakeholders desire? What makes them look good? What increases their power or their status?

6. What are your stakeholders looking for most? Are they searching for good design, guarantees, specific features, or more features?

7. What do your stakeholders dream about? What do they aspire to achieve, or what would be a big relief to them?

8. How do your stakeholders measure success and failure? How do they gauge performance or cost?

9. What would increase your stakeholders' likelihood of adopting a value proposition? Do they desire lower cost, less investment, lower risk, or better quality?

Value Propositions

The questions below can help you clarify how your offering addresses your audience's pains and achieve their gains.

Pain relievers

Could your product/service/program:

1. ... produce savings (in terms of time, money, or efforts)?

2. ... make your stakeholders feel better (by reducing frustrations, annoyances, and other things that give them a headache)?

3. ... fix under-performing solutions (by introducing new features, or better performance or quality)?

4. ... put an end to difficulties and challenges your stakeholders encounter (by making things easier or eliminating obstacles)?

5. ... wipe out negative social consequences your stakeholders encounter or fear (in terms of loss of face or lost power, trust, or status)?

6. ... eliminate risks your stakeholders fear (in terms of financial, social, or technical risks, or things that could potentially go wrong)?

7. ... help your stakeholders sleep better at night (by addressing significant issues, diminishing concerns, or eliminating worries)?

8. ... limit or eradicate common mistakes your stakeholders make when using your product or service (by helping them use it the right way)?

9. ... eliminate barriers that are keeping your stakeholder from adopting value propositions (introducing lower or no upfront investment costs, a flatter learning curve, or eliminating other obstacles preventing adoption)?

Gain Creators

Could your product/service/program:

1. ... create savings that please your stakeholders (in terms of time, money, and effort)?

2. ... produce outcomes your stakeholders expect or that exceed their expectations (by offering higher quality, more of something, or less of something)?

3. ... outperform current value propositions and delight your stakeholders (regarding specific features, performance, or quality)?

4. ... make your stakeholders' work easier (via better usability, accessibility, more services, or lower cost of ownership)?

5. ... create positive social consequences (by making them look good or producing an increase in power or status)?

6. ... do something specific that stakeholders are looking for (in terms of good design, guarantees, specific features, or more features)?

7. ... fulfill a desire stakeholders dream about (by helping them achieve their aspirations or getting relief from a hardship)?

8. ... produce positive outcomes matching your stakeholders' success and failure criteria (in terms of better performance or lower cost)?

9. ... help make adoption easier (through lower cost, fewer investments, lower risk, better quality, improved performance, or better design)?

Frequent Value Proposition Canvas Mistakes

It's no easy task to distill the most relevant insights about your stakeholders and how they interact with your product, service, or other solution. Here are some common mistakes that teams make when producing Value Proposition Canvases.

Trying to Alleviate Every Pain and Target Every Gain

Mediocre or bad value propositions try to address every pain and gain that a team has identified, but then often fail to deliver. Great value propositions often focus on a limited number of pain relievers and gain creators and then deliver on those exceptionally well.

Mixing Present and Future

Make sure you clearly distinguish between existing activities and future ideas. Mixing them can be confusing. You can easily distinguish between the two by using color coding or by using separate maps.

One Map for Multiple Value Propositions

You shouldn't try to sketch out several value propositions and audience segments on the same map. Focus on one value proposition for a specific audience segment on a single map. Make a new map for a different value proposition.

Analysis Paralysis

A great value proposition with a great "fit" on paper is just an untested fantasy. Use the Value Proposition Canvas as a starting point to get out of the building and investigate your assumptions. Ask yourself if you really understand which jobs are important to stakeholders and what the related pains and gains are. Test if your assumptions about how your products and services will relieve pains and create gains are valid.

Learn More

For more guidance and tips on creating Value Proposition Canvases, visit Strategyzer.com.

Example VPC: [ENRM Resource Library]()

VALUE PROPOSITIONS: *ENRM RESOURCE LIBRARY*	
Product & Features Compiled links to Links sites Compiled list of current strategies and policies Curated list of fundamental ENRM resources Curated collection of sector-specific resources related to ENRM	**Gain Creators** Easy access to resources that can convey the value of the environment and NRM to different USAID sectors
	Pain Relievers One-stop shop: Less time spent finding resources that are relevant to different sectors and ENRM

AUDIENCE PROFILE: *MISSION ENVIRONMENT STAFF*	
Gains Sector value recognized Recognition by Mission front office or USAID leadership for successful programs	**User Jobs/Tasks** Designing programs with cross-sectoral components Writing and reviewing comms about activities she manages Preparing reports and/or stories about outcomes
Pains Too many resources, toolkits, guidance, requirements, and too many places to look Difficulty accessing concise and accurate info to inform design and implementation	

Example VPC: *Slack user*

VALUE PROPOSITIONS: *Slack communications app*

Product & Features

Dedicated channels for specific topics/areas

Storage for all messages for all members

Share different kinds of files and formats

Gain Creators

Quicker access to key information

Making better decisions, faster

Customers are masters of their own information

Pain Relievers

75% less email

Reduction in the cost of communication

Threads easy to access

All members easily access relevant threads and content

AUDIENCE PROFILE: *Project Manager*

Gains

Greater efficiency

Increased productivity

Feeling like a valued team member

Pains

Too much email

Emails getting mixed into unrelated messages

Hard to track long email threads

People being left out of threads

No opportunities to comment or provide feedback

Sharing same thing multiple times

User Jobs/Tasks

Sending messages to team members

Sharing files

Brainstorming ideas

Chat with multiple team members at one time

Annex 4:
4 ACES Messaging Checklist

☑ 4 quarters: *Distill the big ideas.*

While the dollar value is the same, no one wants a pocket full of pennies. This is also true of communication. Our brains can only take in and recall so much information. Think quality over quantity. Help your audience by distilling the big ideas for them.

☑ Audience-centered: *Tune into WIFM radio.*

If something is going to grab someone's attention, it must be relevant to their needs. Your audience is constantly asking the question: ***"What's in it for me?" (WIFM)***. In other words, they want to know how your email, product, service, or program helps them. To get their attention, we have to convince them of the direct value to their life and work. And different audience groups have different needs. Frame your messages accordingly.

☑ Concrete: *Paint a picture. Be precise, clear, vivid.*

Our work in development inevitably involves abstraction. We swim in a sea of acronyms and jargon. But even with well-informed audience members, it's easy to get lost and exhausted swimming in that sea. Concrete and descriptive language grabs our audience by the hand and guides them.

☑ Emotional: *Consider the power of emotion.*

We still use the same "mental operating system" that our ancient ancestors used. That part of our brains is fast, powerful, driven by emotion, and makes judgments faster than the speed of thought. Many of those judgments are binary: approach or avoid, friend or foe, helpful or harmful. In this way, the ancient part of the brain serves as a gatekeeper. However factual, accurate, and useful the information is, if the gatekeeper doesn't see direct relevance to its needs, it will tune us out.

☑ Simple: *Use shorter and fewer words.*

Try explaining your work to an older family member—can you do so in a way that makes sense to them? The more complex your language, the harder it is for your audience to follow. Keep messages simple. Use shorter and fewer words. *(**TIP**: Try one idea per sentence!)*

Annex 5: *The "And, But, Therefore" Checklist*

☑ Avoid the ***"and, and, and…"*** trap.

Technical writing often falls into a trap of providing every detail about a topic, often in a series of lists within paragraphs. This approach can be taxing for a reader. They hear, "this happened, and then this happened, and also this, that, and the other happened, followed by thing one, thing two, and thing three." If you notice a lot of lists, colons, and commas in your writing, applying the "and, but, therefore" (ABT) structure to paragraphs, sections, or entire documents can help readers find information relevant to them.

☑ **And:** Clarify the context.

In many cases, we get stuck in the context—so this part of the structure likely comes naturally. However, here are some general guidelines for setting up a good narrative using the ABT framework. First, the context might introduce an ideal or goal state, describe how things are now or used to be, or introduce several key actors or circumstances that set up the conflict. Next, don't spend too long on the context before introducing the conflict—for example, only one or two sentences when applying ABT to a paragraph. Keep details to an essential minimum (think 4 quarters!).

☑ **But:** Lean into the problem.

If there is no conflict—in other words, some problem or goal of interest to the reader—there is very little incentive for the reader to continue reading. While we often deal with issues with significant impacts, in the context of applying the ABT framework, the conflict doesn't have to be some dramatic issue. It can be used more subtly, introducing an unexpected change, barrier, setback, data gap, opportunity that is yet to be achieved, or some other difficulty. ***Note:*** we don't have to use the word "but" every time we introduce the conflict.

☑ **Therefore:** End with a practical "so what."

Each paragraph, section, or document should end in a way that satisfies the conflict in some way, however subtly. We want to give the reader a reason to either keep reading to the next part of the document, or if it's the end of the document, to take some action. The "so what" can offer a summary of next steps, a desired outcome, a takeaway message, some clear call to action, or, at the least, a strong transition into the next paragraph.

Annex 6: *User Experience (UX) Testing in a Nutshell*

Goals of Testing

At the minimum, UX and usability tests would seek to understand two aspects of a website and its content (or other kinds of knowledge products):

1. **Information architecture: *"How is the information organized?"***
   a. Is it easy to find what they're looking for? How long does it take to find something?
   b. Are pages, headings, sections, and navigation items labeled in a way that makes sense to users?
   c. What is their subjective experience of the product's navigation and organization? (e.g., Do they find it frustrating? Innovative? Useful?)

2. **Content value: *"Is the content useful to users?"***
   a. Do they find content that solves their problems, answers their questions, etc.?
   b. How long does it take for them to find the content they're interested in?
   c. Are there clear calls to action, or ways of accessing or otherwise using the content?
   d. Is the content written clearly and concisely?
   e. What is their experience of reading the content? (e.g., Do they seem interested? Annoyed? Pleasantly surprised?)

UX Testing Approaches

To better understand users' experience of these two aspects, you could employ two kinds of usability and UX tests (possibly even within the same session):

Information architecture activities

- These test formats are simple, "gamified" ways of testing the information architecture. Each method is low-effort (for both test creators and test takers) and can typically be completed by participants in five minutes or so.
- **"Tree tests"** are like multiple choice activities that test an existing architecture to see how easily people can find specific kinds of content within the navigation menus.
- **"Card sorting"** activities gather more user-centered insights on how the visitors would organize the information.

Facilitated, one-on-one UX test sessions

- With this testing approach, you would set up ideally five or six one-on-one sessions of roughly 45 minutes each. A "neutral" facilitator shares some rough mock-ups or wireframes of the content and asks participants to complete a series of tasks.
- Participants are asked to "think out loud," sharing all of their reactions as they explore the mock-ups and complete the tasks.
- Ideally there will be a note taker (and a recording to refer to later) that can capture not just the quantitative points (were they able to find the content/complete the task?) but also the qualitative experience (how did they feel while they were navigating the resource?).

Sample UX Test Questions

UX test facilitators typically read a script (to ensure a consistent experience across all tests) that highlights the neutrality of the facilitator (e.g., "Please be completely honest, don't worry about hurting my feelings. We just want to test the resource to improve it for people like yourself") and then walk the participant through a series of tasks, starting from very general to more specific.

Questions might include something like the following:

General

"First, I'm going to ask you to look at this [webpage/resource/document] and tell me your initial thoughts:

- What are your first thoughts as you explore the resource?
- Who do you think this resource is for?
- What can you do with it?

Just look around and think out loud."

Task Questions

Next, I'm going to ask you to find some specific kinds of content.

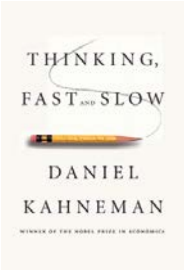
1. Imagine that [present scenario/use case 1]. Can you find any information related to _____?
2. Imagine that [present scenario/use case 2]. Can you find any information related to _____?
3. Imagine that [present scenario/use case 3]. Can you find any information related to _____?

Learn More

For more ideas, scripts, and other practical resources for UX testing, visit: https://sensible.com/download-files/

Annex 7: *Recommended Reading*

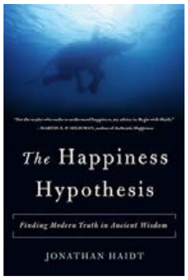
Psychology



[*Thinking, Fast and Slow*]

By Daniel Kahneman

In this highly influential work, Kahneman takes us on a groundbreaking tour of the mind and explains the two systems that drive the way we think.

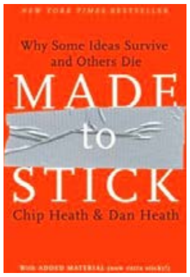


The Happiness Hypothesis

By Jonathan Haidt

Social psychologist Jonathan Haidt introduces the metaphor of the elephant and the rider, the social intuitionist model, and other ideas that influence how we think and interact with others.

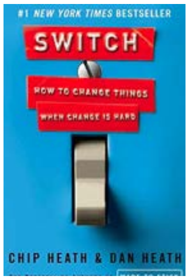
Communications and Behavior Change



Made to Stick: Why Some Ideas Survive and Others Die

By Chip Heath and Dan Heath

In this indispensable guide, we discover that "sticky" messages of all kinds draw their power from the same six traits.



Switch

By Chip Heath and Dan Heath

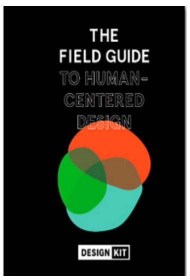
Switch asks the following question: Why is it so hard to make lasting changes in our companies, in our communities, and in our own lives? The primary obstacle is a conflict that's built into our brains between two different systems—the rational mind and the emotional mind.

[*Houston, We Have a Narrative*]

By Randy Olson

This book presents a practical method to incorporate into technical writing the basic elements of story, narrative structures that our brains are all but hardwired to look for—which Olson boils down to "And, But, Therefore," or ABT.

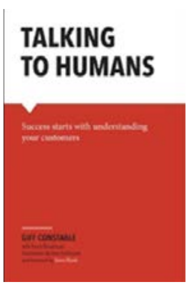
User Experience (UX) Design



The Field Guide to Human-Centered Design

By IDEO.org

A (free) step-by-step guide that will get you solving problems like a designer. Contains practical tips for audience research and much more.



Talking to Humans

By Giff Constable

Geared toward startup businesses but still relevant for our work, this book will teach you how to structure and run effective audience interviews, find candidates, and turn learnings into action.

Don't Make Me Think

By Steve Krug

Since *Don't Make Me Think* was first published in 2000, hundreds of thousands of web designers and developers have relied on usability guru Steve Krug's guide to help them understand the principles of intuitive navigation and information design.

Endnotes

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