Blog Post 5:

A Clustering of Quotes and Concepts from Karen Schriver's "What do Technical Communicators Need to Know about Information Design"

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The purpose of this post is to provide you, my fellow English 501 colleague, with a distilled reading of Chapter 16, *What do Technical Communicators Need to Know about Information Design*, within the book, *Solving Problems in Technical Communication*, pages 386–422. In this distillation, I extracted notable findings, suggestions, and concepts from Schriver's chapter that I felt could help us improve our comprehension of information design. I have also pulled many quotes that I felt could be applied in my own day-to-day work as a technical writer, especially when it comes to designing document templates. If you also feel that what I've provided is useful in your work, please feel free to use as needed!

Summary and Introduction

- "This chapter offers a heuristic for structuring content visually and for making the structure salient through **grouping**, **organizing**, and **signaling**" (386).
- "In particular, the heuristic explores three information-design principles for making one's thinking visible to readers: (1) **grouping** content rhetorically, (2) **organizing** content visually, and (3) **signaling** structural relationships" (387).

Why Research on Information Design is Useful

- "Research on information design helps technical communicators understand how different people typically engage with visual and verbal content" (388).
- "Moreover, information-design research shows us how visual design may influence the persona projected by the content and how design can influence whether readers believe in the credibility of the content and the trustworthiness of the authors" (388).

What is Information Design

- "Information design is the art and science of integrating writing and design so that people can use content in ways that suit their personal goals" (388).
- "A fundamental goal for information design is to enable and enhance relationships among stakeholders for an artifact" (388).
- "technical communicators need to acquire sophisticated skills in modeling stakeholders' processes of interpretation" (388).

- "bad information design can leave stakeholders with a lasting negative impression" (389).
- "Technical communicators need to worry about people's cognitive and emotional responses to their content" (389).

Information Design Emphasizes the Visual

- "the appearance of a communication influences whether people will want to read it" (389).
- "people remember content presented visually more easily than content presented verbally" (389).
- "if the visual display of the text does not attract viewers or confuses them, reading may never begin or will stop before much of the content is considered" (389).

Grouping Content Rhetorically

- "When text and graphics are organized into meaningful semantic **clusters**, it makes it easier for readers to **chunk** the content" (390).

Grouping Can Be Visual or Verbal

- "make implicit structures explicit for readers" (390).
- "When content is formatted consistently, readers can readily perceive intended relationships among the content elements" (390).
- "Structuring visual content involves grouping visual materials to make an argument or to tell a story" (390).

Grouping Can Have Cognitive and Affective Benefits for Readers

- "Grouping content spatially makes the content more coherent, allowing readers to recognize how the pieces of the message fit together" (391).
- "Grouping...renders it [content] visually conspicuous—quite important for busy readers, impatient readers, less-able readers, and people who are reading in a second language" (391).

Grouping Can Simplify Complex Content

- "Breaking the text into short paragraphs promotes faster reading...the shorter length influences readers' sense of how much effort it will take to read." (391).

Grouping Can Show Semantic Relationships

- "When groups of content are positioned in close proximity...readers can easily infer their relatedness" (391).
- "When readers can form judgments about the nature of the content quickly and see how elements are related, they are more likely to continue reading" (392).

- "Getting people to read and keep reading is an important benefit of grouping content rhetorically" (392).

Organizing Content Visually to Show Contrasts

- "One of the earliest discoveries of Gestalt psychology was that the way things look depends not just on the properties of their elementary parts, but also, and more importantly, on their organization" (392).
- "contrast is fundamental to human perception" (392).

Enhancing Contrast

- Contrast...
    - "can reveal the architecture of the content, making the hierarchy visually present and helping readers see relationships among the parts" (392).
    - "helps people as they search for content" (392).
    - "is a fundamental perceptual aid to their [low-vision readers'] seeing the text at all" (393).

Typeface: Serif or Sans Serif?

- "readers pay more attention to the amount of contrast among styles within a typeface (e.g., light, medium, bold, extrabold, black) than they do to the distinction between serif and sans serif" (393).
- "when the typographic resolution excellent, serif or sans serif typefaces are equally legible and equally fast to read" (393).
- "when the resolution is average or poor, sans serif is more legible" (394).
- "when Americans engage with continuous text,...they preferred serif faces, but when reading more technical prose,...they preferred sans serif" (394).
- "people tend to prefer what [typefaces] they are accustomed to reading" (394).
- "most people prefer sans serif [online]" (395).

Type Size

- "Ten-point type is read more slowly, but more accurately, than 12-point" (395).
- "Most readers prefer larger type" (395).

Uppercase vs. Lowercase Type

- "when the body text is displayed in all capital letters, reading speed can be slowed about 13 to 20%" (395).
- "when uppercase is employed sparingly, it can make it easy to locate those items because they stand out due to the contrast" (396).

- "a combination of upper- and lowercase makes the reading process more smooth and efficient" (396).
- "When extra emphasis is needed, **bold** has been found to be a better cue than uppercase" (396).

Signaling Structural Relationships

- "Technical communicators signal the content's structure in two primary ways: visually...and verbally" (396).

Signaling Visually

- "Size and position are primary visual cues to signal importance" (396).
- "By signaling the structure conspicuously, readers are more likely to notice important relationships in the content and to recognize thematic continuities" (397).
- "In cases in which encouraging the reader to notice is critical,...designers often employ **double signaling**" (397).
- "it is important to be judicious in signaling with typography, as too many signals or too much repetition of a particular cue can flatten the visual hierarchy, making it hard to tell what is important because nearly everything is signaled" (397).

Signaling Verbally

- "Technical communicators aim to make the structure explicit through careful composition of verbal cues" (397).
- "Many print and online documents have a hierarchical structure, signaled by making broader topics (or more important topics) more prominent than specific topics (or less important topics)" (397).
- "Designers can improve the quality of their content by...
    - organizing it into logical and semantically related rhetorical groups,
    - thinking carefully about how many levels of content are needed,
    - determining how the groups should be organized to orchestrate a message, and
    - using verbal devices such as labels, names, captions, and headings that enable readers to make quick judgments about the nature of each group" (397–398).

Using Information Design to Shape Content: A Three-phase Heuristic

Phase 1: Group Content into Rhetorical Clusters

- "A **rhetorical cluster** is a collection of coordinated text elements (visual, verbal, or mathematical) that is designed to guide the reader in engaging with the content" (398).

- "A key feature of a rhetorical cluster is that its elements are interdependent, dynamically shaping the reader's interpretation" (398).

Rhetorical Clustering versus Chunking

- "A rhetorical cluster is not a chunk" (399).
- Chunking...
    - "can help busy readers see a lengthy text as more manageable" (399).
    - "is usually considered an editing strategy for tightening the writing in order to make the chunks of content stand on their own while fitting them into a larger text structure" (399).
- Rhetorical clustering...
    - "is an invention and planning strategy for writing or design, encouraging audience-centric groupings of content for maximum rhetorical impact" (399).
    - "organizes visual and verbal content in ways that allow readers to see important relationships among textual and graphic elements" (399).

Devising Preliminary Groupings for the Content

- "Before choosing a scheme for grouping the content into rhetorical clusters, consider readers' likely purposes and goals for using the information" (399).
- "Make use of familiar genre patterns...as you think about optional designs" (399).
- "Using multiple types of rhetorical clusters in the same artifact adds visual contrast and interest to the content" (400).
- Rhetorical clustering...
    - "is a practical way to try out different structures early in the writing and design process before too many commitments are made" (400).
    - "allows communicators to form a visual roadmap, helpful in planning an artifacts big picture as well as its little picture" (400).

Phase 2: Organize Clusters Visually to Show Contrasts

- "It is important to organize the visual display of the text and graphics by considering the order in which readers (or viewers) may look at them" (402).
- "The reader's priorities for using the content should dictate the overall spatial display and the need for predictability in the content's positioning" (402).
- "Providing contrast sometimes means interrupting the rhythm of a sequence" (402).
- "Obtaining early feedback offers a crucial sense of how people (outside of the design team) may construct the persona projected by the information design (e.g., serious, playful, manipulative, corporate, condescending)" (403).

Phase 3: Signal Structural Relations

- "The signaling phase operates recursively with the processes of grouping and organizing—each set of decisions dynamically influences the others" (403).
- "The technical communicator's goal in carrying out the third phase of the heuristic is to guide the reader's eye through the content by carefully choosing signals that establish the structure and tone" (403).
- "If the message is primarily textual, strive for typographic cues that emphasize contrasts that bring the structure to the fore" (403).
- "Choose a typeface with excellent contrast among the styles within the face (that is, it has good contrast between the boldface and the regular style)" (405).

Consider Preferences for and Familiarity with Cues

- "The **x-height** refers to the height of a lowercase x in the alphabet of a given typeface; it is the distance between the baseline of a letterform (bottom of lowercase x) and the mean line of a letterform (top of lowercase x)" (408).
- "small x-heights tend to make the text look smaller than one would expect for a given point size. In such cases, it makes sense to increase the point size to enhance its legibility" (409).
- "large x-heights may make the text look crowded and dense, requiring the designer to increase the leading (the space between the lines of type) in order to increase the legibility" (409).
- "Because attitudes about typography are evolving, it is important to study the culture of the people who will engage with the artifact and attempt to employ cues they will prefer, find comfortable, and negotiate easily" (409).

Assess the Quality of the Design and the Intelligibility of the Cues

- "usability testing can guide technical communicators in revising their overall design as well as their visual and verbal systems for signaling the structure" (410).
- "The findings of usability testing can alert us to visual or verbal cues that are missing, incomplete, inconsistently executed, or just plain unclear" (410).

Extended Example

- "Miguel's supervisor was very satisfied with his work and believed it was an excellent prototype on which they could base other short pieces" (420). Great job, Miguel!