

APPLYING BEHAVIORAL INSIGHTS TO DESIGN EFFECTIVE COMMUNICATIONS

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ABOUT THIS GUIDE

Why focus on communication materials

Effective communication is a critical determinant of program success that is often overlooked. Programs typically rely on a variety of communication materials—from memos, to guidelines, to various online tools—that support day-to-day implementation by teachers, coaches, and system leaders. It's crucial to design communications materials in a way that helps and encourages people to use them as intended. Doing this effectively can have a significant impact on the quality of a program's implementation, and its eventual success in reaching its goals.

What this guide includes

Drawing on insights from behavioral science, ideas42 has identified best-practices to help programs develop communications that are clear and actionable. In this guide, we share:

- **A framework** for driving engagement with communication materials
- **A checklist** outlining 12 best practices for communication materials
- **Evidence and examples** to support practices included in the checklist

How to use this guide

Use the checklist to **design new** or **refine existing** communication materials. The checklist can be applied to a variety of communication materials, including letters, email and text messages, presentations, guides and manuals, websites, online portals, and dashboards.

Have questions? Reach out to us at globaldev@ideas42.org.

A FRAMEWORK TO DRIVE ENGAGEMENT

Communication from trusted sources is essential for helping students, teachers, school leaders, parents, and government officials take actions that improve education outcomes.

To do this effectively, communication materials must *capture attention*, *deliver information effectively*, and *facilitate action*. This resource summarizes evidence-based best practices that help communication materials succeed at each of these stages.



CAPTURE ATTENTION

The first challenge in communicating effectively is making sure that the message is noticed. These tips help get your message in front of users effectively.



DELIVER INFORMATION

Once someone notices a communication, it is essential that they understand and trust the message. It is therefore critical that messages are comprehensible and credible.



FACILITATE ACTION

It's not enough to tell someone what they need to know; it's also important to make it easy for them to follow through on their intentions to engage. Messages must be communicated and presented in a way that prompt people to act.

CHECKLIST



CAPTURE ATTENTION

- Is it salient?** Highlight key messages, select timing and channels strategically.
- Is it relevant?** Address users by name, appeal to identity & cite past actions.
- Is it credible?** Choose trusted messengers, like local leaders or institutions.
- Is it consistent?** Align messages across platforms, pace to avoid overload.



DELIVER INFORMATION

- Is it simple?** Be clear, present key actions as lists, remove extra information.
- Is it clear?** Show clear options, explain trade-offs, set best default.
- Is it social?** Highlight peers' actions, emphasize desired behaviors.
- Is it reassuring?** Dispel myths and use empowering language.



FACILITATE ACTION

- Is it focused?** Emphasize key actions, with clear calls to action.
- Is it timely?** Provide clear timelines and deadlines to enable timely action.
- Is it actionable?** Simplify steps, use interactive channels, pre-fill information.
- Is it supportive?** Offer help and normalize seeking it, prompt plan-making.



CAPTURE ATTENTION

The first challenge of effective communications is making sure your message gets through. Providing information or guidance to people does not guarantee they will notice and engage with it. If people don't pay attention to what you share, consider different ways to design or share your communication materials to get their attention.

Communications that effectively capture attention are...



SALIENT

Will the communication stand out to users in a noisy environment?

- Does it stand out?** Make sure your messages stand out by writing “ACTION REQUIRED” in the headline, for example.
- Is the timing right?** Send messages or make materials available at a time when users are likely to be able to engage.
- Is the delivery channel right?** Consider whether your message is best suited for digital or in-person communication or even individual outreach from familiar people.

RESEARCH SAYS...

Students who received deliberately timed and personalized text messages with campus-specific information were 7.1 percentage points more likely to enroll in college than their relative control group (Castleman & Page, 2015).

IN PRACTICE GLOBALLY

Taking advantage of people's radio usage in rural Timor Leste, UNICEF ran a 48-part drama radio series to promote positive parenting practices. The series reached 1300 people in some of the hardest-to-reach areas. The take-away? When people are bombarded with messages, you don't need to do something flashy to stand out. Sometimes, the way to make your message salient is to understand and use the channels the people you want to reach already use (UNICEF, 2017).

READ TO LEARN MORE:

- Castelo, N., Hardy, E., House, J., Mazar, N., Tsai, C., & Zhao, M. (2015). Moving citizens online: Using salience & message framing to motivate behavior change. *Behavioral Science & Policy*, 1(2), 57-68.
- UNICEF. (2018). Communication for Development (C4D) 2017: Global progress and country-level highlights across programme areas. United Nations Children's Fund. https://www.unicef.org/media/47781/file/UNICEF_2017_Report_on_Communication_for_Development_C4D.pdf
- Stephens, K. K., Barrett, A. K., & Mahometa, M. J. (2013). Organizational communication in emergencies: Using multiple channels and sources to combat noise and capture attention. *Human Communication Research*, 39(2), 230-251.
- Castleman, B. L., & Page, L. C. (2015). Summer nudging: Can personalized text messages and peer mentor outreach increase college going among low-income high school graduates?. *Journal of Economic Behavior & Organization*, 115, 144-160.

Communications that effectively capture attention are...



RELEVANT

Does the communication speak to the user's particular situation and identity?

- Is it personalized?** Use information like the users first name in your message. To increase engagement, avoid sending generic messages.
- Does it speak to individual identity?** Target messages based on what you know about the user.
- Does it acknowledge what's already been done?** Acknowledge any steps the user has already taken, to give them a sense of endowed progress.

RESEARCH SAYS...

A text message campaign that sent tailored messages to students about key tasks they had not yet completed (such as filing the FAFSA or completing course registration) significantly increased completion rates (Page et al, 2020).

IN PRACTICE GLOBALLY

In Ethiopia, a school-based campaign encouraged girls to speak out against child marriage. The messaging was tailored to their experiences, helping them see themselves as agents of change. Girls who participated in the campaign reported at-risk cases to school authorities, and 325 child marriages were stopped. When messages connect to people's identities, they're likely to catch people's attention (UNICEF, 2017).

READ TO LEARN MORE:

Castleman, B. L., & Page, L. C. (2015). Summer nudging: Can personalized text messages and peer mentor outreach increase college going among low-income high school graduates?. *Journal of Economic Behavior & Organization*, 115, 144-160.

Haynes, L. C., Green, D. P., Gallagher, R., John, P., & Torgerson, D. J. (2013). Collection of delinquent fines: An adaptive randomized trial to assess the effectiveness of alternative text messages. *Journal of Policy Analysis and Management*, 32(4), 718-730.

UNICEF. (2018). Communication for Development (C4D) 2017: Global progress and country-level highlights across programme areas. United Nations Children's Fund. https://www.unicef.org/media/47781/file/UNICEF_2017_Report_on_Communication_for_Development_C4D.pdf

Page, L. C., Lee, J., & Gehlbach, H. (2020). Conditions under which college students can be responsive to nudging. *EdWorkingPapers.com*.

Communications that effectively capture attention are...



CREDIBLE

Is the message coming from a source that users trust?

- **Is the sender right?** Pick a messenger who people will trust, such as supervisors or education officials.
- **Is it from an individual?** Sign messages from a specific person rather than having them come from a department or organization.
- **Could you use community messengers?** Equip trusted members of the education community to amplify a message or make referrals.

RESEARCH SAYS...

A text message campaign designed to increase matriculation rates was more effective at prompting students to meet with advisors if students already had a strong relationship with the specific advisor (Castleman & Page, 2015).

IN PRACTICE GLOBALLY

In the state of Colima in Mexico, state authorities flagged schools that were struggling and shared potential solutions with them. The message came from a trusted source and school leaders took it seriously by making school improvement plans. This led to a 0.12 standard deviation bump in student test scores. Choosing the right messenger, someone people respect, can be as important as the message itself (Hoyos, Garcia-Moreno, Patrinos, 2015).

READ TO LEARN MORE:

- Bird, K. A., Castleman, B. L., Denning, J. T., Goodman, J., Lambertson, C., & Rosinger, K. O. (2021). Nudging at scale: Experimental evidence from FAFSA completion campaigns. *Journal of Economic Behavior & Organization*, 183, 105-128.
- Keating, C. (2019, February 2). Secrets of Direct Mail: The Dialogue Method by Siegfried Vögele [Blog post]. Retrieved from: <https://sofii.org/article/secrets-of-direct-mail-1-professor-siegfried-voegele>
- de Hoyos, R., García-Moreno, V. A., & Patrinos, H. A. (2015). The impact of an accountability intervention with diagnostic feedback: Evidence from Mexico. World Bank Policy Research Working Paper 7393.
- Castleman, B. L., & Page, L. C. (2015). Summer nudging: Can personalized text messages and peer mentor outreach increase college going among low-income high school graduates?. *Journal of Economic Behavior & Organization*, 115, 144-160.

Communications that effectively capture attention are...



CONSISTENT

Are communications across channels reinforcing one another?

➤ Is the messaging aligned? Coordinate across different communication efforts so users don't get conflicting information.

➤ Could you use multiple channels? Supplement traditional campaign formats with SMS, phone calls, or individual outreach to connect in varied ways.

➤ Is the calendar coordinated? Align communications calendars across different outreach efforts to avoid overwhelming the user.

RESEARCH SAYS...

People are more likely to avoid vaccination if they perceive safety information to be inconsistent, even if the known risks from the disease are greater. Conflicting health information leads to anxiety and inaction (Dubov & Phung, 2015).

READ TO LEARN MORE:

Dubov, A., & Phung, C. (2015). Nudges or mandates? The ethics of mandatory flu vaccination. *Vaccine*, 33(22), 2530-2535.

Page, L. C., Lee, J., & Gehlbach, H. (2020). Conditions under which college students can be responsive to nudging. *EdWorkingPapers.com*.

Salazar, K. (2020, August 16). Orchestration in the Omnichannel Experience [Blog post]. Retrieved from: <https://www.nngroup.com/articles/omnichannel-orchestration/>



DELIVER INFORMATION

Once you have someone's attention, the next step is to make sure they understand and trust the message you're sending. Successful communications dispel ambiguity and equip users with the information they need to make confident decisions about whether to take next steps, and how to proceed.

Communications that effectively deliver information are...



SIMPLE

Is the message short and easy to understand?

- **Are things stated plainly?** Write messages in the active voice and using plain language. Omit technical jargon and acronyms.
- **Do you use checklists?** Provide simple, step-by-step overviews for complex processes.
- **Do you highlight key points?** Share important points first. Use font size, italicization, and bolding strategically to draw attention to them.

RESEARCH SAYS...

People are more likely to comply when instructions are written in an active voice, avoiding jargon and acronyms. In one study, simplifying language increased follow-through by 14 percentage points (Faulker et al, 2019).

READ TO LEARN MORE:

Dynarski, S. (2000). Hope for whom? Financial aid for the middle class and its impact on college attendance. *National Tax Journal*, 53(3), 629-661.

Faulkner, N., Borg, K., Bragge, P., Curtis, J., Ghafoori, E., Goodwin, D., ... & Wright, P. (2019). The INSPIRE framework: How public administrators can increase compliance with written requests using behavioral techniques. *Public Administration Review*, 79(1), 125-135.

Oppenheimer, D. M. (2006). Consequences of erudite vernacular utilized irrespective of necessity: Problems with using long words needlessly. *Applied Cognitive Psychology: The Official Journal of the Society for Applied Research in Memory and Cognition*, 20(2), 139-156.

Communications that effectively deliver information are...



CLEAR

Is it presented in a way that removes ambiguity?



Are all options relevant? When users have to make a choice, reduce the cognitive burden by eliminating irrelevant options.



Do you explain costs and benefits? For complex decisions, clearly explain the trade-offs to help people decide.



Is there a smart default? Help people who may be unsure how to proceed by pre-selecting an option (but make it easy for them to switch).

RESEARCH SAYS...

Over 70% of students who could send up to four ACT reports to colleges for free chose to send exactly four reports, anchoring to that default (Lavecchia et al, 2016).

IN PRACTICE GLOBALLY

Parents in Moldova were invited to watch educational films and public debates that showed the real costs of violence against children. The messages clearly communicated the consequences of harmful behaviors and the benefits of positive parenting. By explaining the trade-offs, parents could see the impact of their disciplinary choices on their kids' lives (UNICEF, 2017).

READ TO LEARN MORE:

Castelo, N., Hardy, E., House, J., Mazar, N., Tsai, C., & Zhao, M. (2015). Moving citizens online: Using salience & message framing to motivate behavior change. *Behavioral Science & Policy*, 1(2), 57-68.

Halpern, S. D., Loewenstein, G., Volpp, K. G., Cooney, E., Vranas, K., Quill, C. M., ... & Bryce, C. (2013). Default options in advance directives influence how patients set goals for end-of-life care. *Health Affairs*, 32(2), 408-417.

UNICEF. (2018). Communication for Development (C4D) 2017: Global progress and country-level highlights across programme areas. United Nations Children's Fund.

https://www.unicef.org/media/47781/file/UNICEF_2017_Report_on_Communication_for_Development_C4D.pdf

Lavecchia, A. M., Liu, H., & Oreopoulos, P. (2016). Behavioral economics of education: Progress and possibilities. In *Handbook of the Economics of Education* (Vol. 5, pp. 1-74). Elsevier.

Communications that effectively deliver information are...



SOCIAL

Does the message give users cues about what is normal and expected?

- Do you share local norms?** If other people already take the desired action (or take it more often than the user), share those statistics.
- Do you reference relevant identities?** When possible, include information about peer participation to reference similar groups.
- Is behavior visible?** Encourage people to share their own actions, especially if it's something done alone or that has perceived stigma.

RESEARCH SAYS...

People were more likely to share voting habits on Facebook when presented with profile pictures of friends who had done so, compared to people who received a generic informational message about voting (Corbyn, 2012).

IN PRACTICE GLOBALLY

In Madagascar, low-income students heard about role models from similar backgrounds who had done well in school. That little connection made a real difference for these students: their test scores went up by 0.27 standard deviations. When you show people what peers like them are doing, it makes goals feel achievable (Nguyen, 2008).

READ TO LEARN MORE:

- Cialdini, R. B., Reno, R. R., & Kallgren, C. A. (1990). A focus theory of normative conduct: Recycling the concept of norms to reduce littering in public places. *Journal of personality and social psychology*, 58(6), 1015.
- Robinson, E., Thomas, J., Aveyard, P., & Higgs, S. (2014). What everyone else is eating: a systematic review and meta-analysis of the effect of informational eating norms on eating behavior. *Journal of the Academy of Nutrition and Dietetics*, 114(3), 414-429.
- Nguyen, T. (2008). Information, role models and perceived returns to education: Experimental evidence from Madagascar. Job Market Paper, Massachusetts Institute of Technology.
- Corbyn, Z. (2012). Facebook experiment boosts US voter turnout. *Nature*, 12.

Communications that effectively deliver information are...



REASSURING

Does the message proactively address anticipated concerns?

Do you address myths without reinforcing them? Correct misinformation by providing facts without stating the related falsehood.

Do you boost self-efficacy? Use affirmative and empowering language to describe rules, not punitive language about consequences.

Have you considered other barriers? Consider why else someone might choose not to act and proactively target those concerns.

RESEARCH SAYS...

Repetition makes people more likely to internalize claims as true, even if told that they're false in the moment. Myth-busting can also create a misplaced sense of controversy (Schwarz et al, 2016).

IN PRACTICE GLOBALLY

Parents in India who received simple, easy-to-use tools along with confidence-building messages increased learning support for their children by 3.35 percentage points. The messages reassured their capability in supporting their children. If you want to convince people to act, give them the resources and show them it's possible (CSBC & CSF, 2023).

READ TO LEARN MORE:

Cialdini, R. B., & Goldstein, N. J. (2002). The science and practice of persuasion. *Cornell Hotel and Restaurant Administration Quarterly*, 43(2), 40-50.

Supiano, B. (2014). Applying for Aid May Be a Barrier for Returning Students, Too. *The Chronicle of Higher Education*. Retrieved from: <http://chronicle.com/blogs/headcount/>

Centre for Social and Behaviour Change (CSBC) & Central Square Foundation (CSF). (2023, March 16). Using behavioral insights to increase parental engagement on FLN (Part 2). Central Square Foundation. <https://www.centralsquarefoundation.org/blogs/using-behavioral-insights-to-increase-parental-engagement-on-fln-part-2>

Schwarz, N., Newman, E., & Leach, W. (2016). Making the truth stick & the myths fade: Lessons from cognitive psychology. *Behavioral Science & Policy*, 2(1), 85-95.



FACILITATE ACTION

Communications should always go beyond delivering information; they should focus on helping users take actions in line with their choices and preferences. Effective design and presentation of communication materials makes it easy for users to take steps to improve the desired outcomes.

Communications that effectively facilitate action are...



FOCUSED

Do communications make good use of limited attention?

- Is there a call to action?** Be clear about the goal so users don't wonder what they should do. Always make messages actionable.
- Is the action specific?** Focus on specific actions that users should take in the moment.
- Could anything be automated?** Reduce the burden on users by completing as many steps for them as is possible. For example, pre-fill any required forms or templates to the extent possible.

RESEARCH SAYS...

An automated software system that was able to pre-populate about two-thirds of people's FAFSA forms based on submitted tax returns was part of an intervention that increased FAFSA submission and college completion rates (Bettinger et al, 2012).

IN PRACTICE GLOBALLY

Leaders of school health clubs in Ethiopia ran a series of fun learning games for children. The games didn't just show which foods and habits were healthy, they also got kids to share what they learned with each other on the spot. By talking about these tips right away, everyone could see exactly which actions could make a difference on their health (UNICEF, 2017).

READ TO LEARN MORE:

- UNICEF. (2018). Communication for Development (C4D) 2017: Global progress and country-level highlights across programme areas. United Nations Children's Fund. https://www.unicef.org/media/47781/file/UNICEF_2017_Report_on_Communication_for_Development_C4D.pdf
- Dynarski, S. (2000). Hope for whom? Financial aid for the middle class and its impact on college attendance. *National Tax Journal*, 53(3), 629-661.
- Hales, B. M., & Pronovost, P. J. (2006). The checklist—a tool for error management and performance improvement. *Journal of Critical Care*, 21(3), 231-235.
- Bettinger, E. P., Long, B. T., Oreopoulos, P., & Sanbonmatsu, L. (2012). The role of application assistance and information in college decisions: Results from the H&R Block FAFSA experiment. *The Quarterly Journal of Economics*, 127(3), 1205-1242.

Communications that effectively facilitate action are...



TIMELY

Is the communication aligned with key dates and deadlines?

- Can users act right in the moment?** Limit gaps between when a message is received and can be acted on. Also, send reminders to act.
- Is the timeline clear?** Dispel uncertainty by outlining the key moments when users will need to make choices or act.
- Do you highlight key deadlines?** Let users know when actions need to be taken and encourage acting early.

RESEARCH SAYS...

Students who were given multiple evenly spaced deadlines were more likely to complete a task over the course of a semester than those given either one final deadline or no deadline at all (Ariely & Wertenbroch, 2002).

READ TO LEARN MORE:

- Ariely, D., & Wertenbroch, K. (2002). Procrastination, deadlines, and performance: Self-control by precommitment. *Psychological Science*, 13(3), 219-224.
- Bettinger, E. P., Long, B. T., Oreopoulos, P., & Sanbonmatsu, L. (2012). The role of application assistance and information in college decisions: Results from the H&R Block FAFSA experiment. *The Quarterly Journal of Economics*, 127(3), 1205-1242.
- Chojnacki, G., Deutsch, J., Amin, S., Perez-Johnson, I., Darling, M., & Lefkowitz, J. (2016). Pilot OSHA citation process increases employer responsiveness. DOL Behavioral Interventions Project Brief, Department of Labor, Washington, DC.

Communications that effectively facilitate action are...



ACTIONABLE

Can users easily act on the instructions they are given?

- **Is it easy to take the next step?** Include direct links to required forms, use scheduling tools, pre-populate information, etc.
- **Is there a checklist?** For multi-step processes, include a checklist with concrete steps that users can use to track their progress.
- **Can users respond in the same channel?** Is it easy for users to respond to your communication with their response or to seek clarity?

RESEARCH SAYS...

Castleman and Page (2015) developed a text message campaign to increase timely enrollment that included links to key tasks within the messages, allowing students to take the next step right in the moment and via the same channel.

IN PRACTICE GLOBALLY

The Tarbiyeh campaign in Jordan taught teachers to move away from physical and verbal punishment. In addition to explaining why non-violent discipline mattered, teachers were given clear tools and step-by-step guidance on how to do it. This made it easy for teachers to apply these techniques in the classroom right away (UNICEF, 2017).

READ TO LEARN MORE:

- Bettinger, E. P., Long, B. T., Oreopoulos, P., & Sanbonmatsu, L. (2012). The role of application assistance and information in college decisions: Results from the H&R Block FAFSA experiment. *The Quarterly Journal of Economics*, 127(3), 1205-1242.
- Nunes, J. C., & Dreze, X. (2006). The endowed progress effect: How artificial advancement increases effort. *Journal of Consumer Research*, 32(4), 504-512.
- UNICEF. (2018). Communication for Development (C4D) 2017: Global progress and country-level highlights across programme areas. United Nations Children's Fund. https://www.unicef.org/media/47781/file/UNICEF_2017_Report_on_Communication_for_Development_C4D.pdf
- Castleman, B. L., & Page, L. C. (2015). Summer nudging: Can personalized text messages and peer mentor outreach increase college going among low-income high school graduates?. *Journal of Economic Behavior & Organization*, 115, 144-160.

Communications that effectively facilitate action are...



SUPPORTIVE

Is there support available to help users follow through on their intentions?

- **Do you offer help?** Include prominently displayed links or phone numbers that users can use to navigate any challenges.
- **Does it prompt plan-making?** Encourage users to outline logistics for future actions like when, where, how, and with whom they will take those actions.
- **Does it normalize help-seeking?** Invite users to access support that is already available.

RESEARCH SAYS...

People were more likely to get vaccinated when they were prompted to plan for when they would make their appointment, and even more so if prompted to consider what time of day would work best for them (Milkman et al, 2011).

IN PRACTICE GLOBALLY

Parents found SMS tips most useful when they came with clear guidance on how to do suggested activities. Messages like “Pick an object and describe it using words like ‘fuzzy, brown, cuddly’” also included examples of how to reinforce the activity. With this support built in, most parents reported using the tips to support their children’s learning (Dawson, Stokes & Williams, 2022).

READ TO LEARN MORE:

Bettinger, E. P., & Baker, R. B. (2014). The effects of student coaching: An evaluation of a randomized experiment in student advising. *Educational Evaluation and Policy Analysis*, 36(1), 3-19.

Lavecchia, A. M., Liu, H., & Oreopoulos, P. (2016). Behavioral economics of education: Progress and possibilities. In *Handbook of the Economics of Education* (Vol. 5, pp. 1-74). Elsevier.

Dawson, A., Stokes, L., & Williams, C. (2022). Can texting parents help improve children's development? National Institute of Economic and Social Research Blog, 12 May 2022.

Fittner, P. (2016). Academic help seeking constructs and group differences: An examination of First-Year University Students. University of Nevada, Reno.

Milkman, K. L., Beshears, J., Choi, J. J., Laibson, D., & Madrian, B. C. (2011). Using implementation intentions prompts to enhance influenza vaccination rates. *Proceedings of the National Academy of Sciences*, 108(26), 10415-10420.

About ideas42

ideas42 is a nonprofit organization that applies insights from behavioral science—the study of how people make decisions and act in the real world—to improve lives and drive social change. Working globally, we reinvent the practices of institutions and create more effective products and policies that can be scaled for maximum impact.

We also teach others, ultimately striving for a future where the universal application of behavioral science powers a world with optimal health, equitable wealth, and environments and systems that are sustainable and just for all.

For the past 15 years, we've been at the forefront of applying behavioral science to create a more equitable world. And as we've developed our expertise, we've helped to define an entire field. Our efforts have so far extended to 50+ countries as we've partnered with hundreds of governments, foundations, NGOs, private sector entities, and philanthropic leaders.

We want to hear from you

Visit ideas42.org/global-development and follow @ideas42 on X (formerly Twitter) to learn more about our work. Contact us at globaldev@ideas42.org with questions.

