Communication Wise

Crossing the tick box

Forms are more than just words on a page. Sometimes the smallest change to a graphic device can make all the difference.

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Shifting users from ticks to crosses

The well-used tick box has been with us as long as the humble form has been in existence. But what happens when you want the form-filler to cross a box rather than tick it?

Imaging technology, using Intelligent Character Recognition (ICR), more readily interprets boxes that have been crossed rather than ticked. The technology uses the position or co-ordinates within the document to locate each question on a form and then 'read' the answers.

When developing a credit card application that would be processed using intelligent character recognition, it was important to get the form-filler to 'cross the tick boxes'.

In other words, we were looking to develop a form that was people and technology friendly – which is sometimes a contradiction in itself.

Initial draft

In an initial draft, two messages were placed on the document instructing people to cross the boxes. One message ran down the side of the page from top to bottom and stated "Please cross the appropriate box". A second message was placed at the beginning of the document before the first question with an example of what the form-filler was mean to do (See Diagram 1).

Please cross the appropriate box ⊠

Diagram 1. An instruction was placed before question 1 requesting the form-filler to cross boxes.

While these instructions helped the respondents at the beginning of the document, in each testing situation they lapsed back into ticking boxes soon after they started filling in the form. In many cases, by the time the form-filler had arrived at question five, they were ticking boxes they should have been crossing. Although this was a little disheartening, it wasn't any real surprise.

The very name of the "tick box" implies a certain behaviour or action. It is therefore not surprising that the form-fillers reverted to "ticking the tick box".

Typically, during usability testing, we do an introduction – where we give the respondent some information on what we were about to do. We thenask the respondent to complete the form we have created. This is followed by a general discussion with the respondent and then the collection of demographic information.

During the general discussion part of the interview, we asked respondents about the instructions on the form and asked them to cross the box and pointed out that although starting with crosses, they reverted to the tick box quite quickly. We asked why they thought they had done this.

The respondents told us it was just a natural tendency to tick the box. What's more, the use of a tick seems to be a more affirmative or positive action whereas a cross seems to have negative connotations.

Creating a cross box rather than a tick box

For the second draft of the form we were looking for a different type of box, one that did not make the respondent feel like "naturally ticking the box".

After some contemplation, we decided to use a box that was indented on all four sides and, to some extent, mimicked the natural shape of a cross (Diagram 2).

Will there be an additional cardholder?
No
Yes

Diagram 2. The first step towards a "cross box".

This box helped to some extent but was still commonly ticked by respondents. The improvement on the number of boxes that were crossed, rather than ticked, was noticeable but not sufficient for the ICR technology.

Reinforcing behaviour

On the third round of usability testing we added a cross to the inside of the box as a constant reminder to maintain crosses throughout the form. This required some fine-tuning because if the cross was too dark the imaging technology would pick up the pre-printed cross as well as the form-filler's cross, thus reading both the yes and no box. At the same time the cross had to be visible to the human eye but subtle to the point of being subliminal (see Diagram 3).

Will there be an additional cardholder?
No
Yes

Diagram 3. Crosses were used inside the tick boxes to act as a constant reminder to the form-filler that the boxes had to be crossed. (Note: reproduction in this journal does not show the correct tone or colour.)

During the third round of testing there was a significant improvement in the use of the cross box and so the form was released as a pilot document to check the outcome of the third round of testing and to look at any residual issues that may exist in the form.

The final analysis

The new credit card application was piloted through a limited release.

A follow-up benchmark study indicated that, over a random sample of 200 forms, 67.5% of forms were filled in using crosses only. Another 18.5% of forms had a mixture of both ticks and crosses and the last 14% had ticks only. There is little doubt that this has been a significant success given the "natural" tendency most people have towards ticking boxes.

To be able to alter the behaviour of nearly 70% of people through the development of a small graphic device is a step towards better documentation for both those who have to process the form and those who have to fill it in