

# The digital consultation playbook

## How to run excellent consultations online



Delib 

## How to use this playbook

The aim of this guide is to enable you to produce a **high quality, open, online consultation** – even if you’ve never done that before. You’ll be pleased to know that nothing in here is hugely difficult once you’re familiar with the basic principles.

This playbook contains advice and principles rather than an exhaustive checklist of mandatory procedures, so don’t be afraid to ask questions or run things past other people – and you can always get in touch with us directly: [delib.net/contact\\_us](https://delib.net/contact_us)

## Why it’s worth the bother

We’ve tried at every point to highlight **incentives** for the approaches advocated.

Generally, this playbook should:

- **Save you time.** The hour spent absorbing this content will spare you days of headache and frustration later in the consultation process.
- **Aid your personal development.** This document contains techniques, tips and tools gleaned from years of practical experience which should add to your skill-set and expertise.
- **Improve your consultations, resulting in better decision-making.** Consultation is not a tick-box exercise; it genuinely affects the quality of relationships with, and service of, the community. More effective consultation will make for a more effective and collaborative organisation.
- **Increase standardisation.** More consistent and joined-up consultation activity will help the public to engage with you more easily and will allow you to gauge, audit and continuously improve your own performance.

## Introducing Citizen Space

Our specialised platform for online consultation is called Citizen Space. It reflects our principles for good consultation: open, high quality, standardised processes.

This playbook applies generally to good consultation practice, but it also makes specific reference to Citizen Space in places.



Learn more about Citizen Space at [citizenspace.com/info](https://citizenspace.com/info)



## Principles to remember

We believe good consultation:

- starts with the **audience**
- produces genuine **insight** that improves decision-making
- is effective because it's **appropriate** – the design is aligned to the purpose
- shows people that they and their input are **valued**



## The what and the who

### Designing appropriate consultations

The key to **effective** consultation is **appropriate** consultation: that is, how well does the consultation align with its intended purpose?

Probably the biggest factors in making your consultation fit for purpose are **audience** and **subject**.

As you can hopefully imagine, the way you'd go about consulting a small group of academic experts on detailed amendments to privacy legislation will look very different to a broad public survey to collect top-line feedback on the quality of transport options.

### Design around audience convenience (not the organisation's)

The first question to ask yourself is: who is this consultation for? From whom do you need to hear?

You need to consider audience up front because **it impacts every other thing you'll do**. The key to success is to build your consultation **for the audience, not for you**.

It can be tempting to just bash out a few token free-text questions to show that you've covered off the 'public engagement' duty. But good consultations are the ones that are built with every question considered from the

perspective of the audience – where **audience convenience drives approach**.

You'll probably know who the audience is for your consultation – it'll often be determined by the nature of the policy, bill or decision under consideration. The audience then has a huge bearing on the type of questions you ask, the language you use, and the response options you provide. If Joe Public would find it easiest to give feedback on, say, bin collections by filling out a comprehensive grid of days vs incremental preferences, by all means use a matrix question to provide that. If it's a simple matter of 'yes or no', though, keep things accordingly straightforward.

### Horses for courses

Say you're consulting a stakeholder organisation... They'll be accustomed to writing long, involved responses. They'll have lots to say and may want to publish their submission on their own site. For them, it's appropriate to use extensive free text or file upload response types.

By the same token, if you're engaging a public audience on a policy that will impact a large chunk of society, it may be more fitting to use quick, quantitative response types like radio buttons that can let you gauge sentiment at scale.

Often, your consultation will actually want to hear from both these types of respondent. You can use **skip logic** (or survey routing) early on to point people to the right kind of questions for them.



[Learn more about skip logic](#)

### Play with personas

The essence of knowing your audience is to put yourself in their shoes, so that everything can be designed for their maximum convenience as your user/target audience.

A useful tool for doing this can be to create personas. Start by defining up to five user types who may respond to your consultation, based on the target audiences you've already identified. For example, you might have a busy single parent who will be directly affected by the mooted policy change, a lobbyist for a campaigning group who has a strong view on the issue and a small business owner who could stand to lose revenue. Imagine each of these types as a real individual: give them names, ages, build up a mental picture of them.

Now, flesh out these details for each persona:

- **I am...**  
Build up the picture of this individual: hobbies, personality, time constraints, lifestyle, family details: 'rushed off my feet with chasing after the kids, have to go to my second job shortly. The only news I get comes at the school gate'.
- **I want to...**  
Consider this person's motivations and how they would want to participate: 'I need to be able to respond as quickly as possible, at a time of my choosing' or 'I want to understand this issue in more depth'.
- **So that I can...**  
Spell out the persona's intended goals, what they'd hope to gain from taking part in the consultation: 'leave an informed response' or 'try and stop this policy from being passed'.

After undertaking this exercise with your key personas, you can then create 'user stories' which will further inform the design of your consultation and your outreach plan.

### The unwritten contract

Every time you run a consultation, you're asking participants to enter into an unwritten contract whereby they give up their time, opinions, knowledge and insight. They're expecting something in exchange for that – usually, a promise of influence over the outcome, or at least consideration in the process.

You need to honour this unwritten contract at all times! A key way to do this is to be explicit about how much influence people's input will have. You should tailor the consultation and feedback processes to reflect that. Tell people up front the commitment you're asking from them – e.g. how much time will it take to complete – and keep reinforcing the value you're offering in exchange.

This is also a useful sense-check on the viability of your consultation as well – is it worth the hassle?

## The nature of the beast

The other key question at the start of the process is: what is this consultation about?

As with audience, the nature of the decision on which you're consulting also has a huge bearing on what an appropriate and effective consultation looks like. Not all consultations are the same: is this a national issue of radical significance or is it a niche decision that marginally modifies an existing policy? Similarly, is this an initial call for evidence, a check on an initiative already underway or simply an opportunity for the public to air their opinions on a largely decided policy?

You need to consider this at the start of the process because, as with audience, **it impacts every other thing you'll do.**

## Pick your moment

An early stage consideration of possibilities is very different to a consultation at the end of a policy cycle, where it's more an exercise in seeing if there are any objections to something that's on the cusp of going through. If it's the former, you'll probably want to provide plenty of contextual information and ask very broad, open-ended questions. If it's the latter, try not to overload people with pages and pages of detailed questions if, realistically, their responses are likely to have little impact on the decision being made.

## Key factors

When identifying the nature of your consultation (and therefore what type of exercise you should create), this list of questions might be handy:

- Where does this consultation fit in the decision or policy-making process?
- Are there special considerations for the particular subject in question? (Some topics can be hugely contentious, whereas others may only concern a small, niche audience. Other topics can touch on very sensitive issues.)
- What is the likely impact of the issue under consideration? Is this an issue of national concern that will affect the lives of millions of people, which will therefore be subject to intense scrutiny?
- How much impact can participants have over the decisions being considered? (You don't want to end up frustrating people by inadvertently implying their input can make more difference than it really will.)
- What is the anticipated scale of response? Based on the audiences, personas and nature of the issue you've already identified, are you likely to get tens, hundreds or hundreds of thousands of responses?
- Will this create consultation fatigue? Have you checked to see whether other consultations have covered similar issues or engaged similar audiences in the recent past?

## Preparation is key

### Don't get caught out

It's important to be ready to process the feedback you get from a consultation. In the majority of cases, this will be straightforward; just part of your standard working practice. But there may also be times when you find yourself with a sudden influx or a huge number of responses in need of analysis.

Whether you expect to have a few dozen or tens of thousands of participants, it's always important to assess your capacity early on so that you can be confident in your ability to actually use the data you collect.

### Some tips to boost capacity

- Run your analysis concurrently with the consultation (in real time) to reduce overall lead time of reporting. (You don't need to wait until all the responses are in before you start coding the ones you've already got)
- You may have analysis specialists in your organisation; if possible, contact them to get support, additional help or further advice if you're expecting a big or complex response.

- It is common practice to augment quantitative response types with an option for further qualitative input (e.g. a free text section at the end of a radio button question).
- Use the most appropriate mix of quantitative and qualitative questions to balance the load of analysis.

### The need to manage expectations

To prevent your capacity getting unrealistically squeezed, both your audience and your internal teams need to have their expectations managed.

Make a realistic – or even conservative – estimate for the key deadlines (based on some of the factors we've already discussed).

For example, if you're expecting a high level of response due to the nature of the issue, make sure you let the public know at the start of the process that you expect it to be some time – perhaps several months after the consultation finishes – before a report will be published.

Make sure to agree these expectations in advance and then stick to them – both with the public and other people in your organisation.



[Adding expected reporting dates to Citizen Space \(see step 14\)](#)

### Please quant responsibly

Quantitative survey options (such as radio buttons, checkboxes and drop-downs) can dramatically reduce the burden of analysis, as no coding process needs to take place and the number-crunching can be handled entirely by Citizen Space. This will give you more time to interpret the results and generate useful insight from the findings.

Whilst quantitative questions may make your life easier, remember they won't always be the most **appropriate** response option for your **audience** or the **nature** of your consultation.



## Choose your words carefully

### The right content in the right language

If you've gone through all the good work of identifying and mapping your audience, considering the nature of your consultation and planning your capacity and analysis, it would be a shame to ruin your consultation by presenting it in inscrutable, obfuscating or otherwise impenetrable language.

It's all too easy to slip into a slew of acronyms, expert or 'insider' terminology and unfamiliar wording that will more likely confuse your audience than help them.

This might, on occasion, be appropriate if you're exclusively consulting a highly technical group of expert stakeholders. But with everyone else, do try and talk like a human being!

### How it all comes together

Giving people the right content (and the right amount of it) benefits both sides: participants don't feel disengaged from the process, and they're able to digest the necessary information so that you get useful, well-reasoned responses.

It's your responsibility not to confuse them, lose their interest or limit people's access to important contextual information. Remember the unwritten contract!

### Clear, concise consultation

The BBC Trust regularly ran consultations about their output. This meant they would frequently consult about specific channels – including children's programming like CBeebies and CBBC. This presented a particular challenge as the audience for these consultations included both young children and their parents.

Consequently, they would often create two separate consultations: one with engaging, easy-to-read content designed for a child's level of literacy, and another with a slightly different focus and vocabulary for parents.

### Writing guide

The following pointers might be a helpful check to make sure your content is comprehensible:

- As always, think of the audience first. The acid test for all your content is 'will my participants be able to understand this?'
- Brevity is your friend, not your enemy. Aim to keep it clear and concise. (If you really need to include large pieces of supporting material, [Fact Banks](#) are a great place for things like appendices, glossaries and references).
- Strive to strike a balance between providing enough information for people to make an informed response but not so much as to break the unwritten contract – e.g. making it more hassle than it's worth to participate in the consultation.

- Experts may be familiar with – or, indeed, prefer – some standard technical terms from their field. But make sure to explain them if you're also dealing with a broader audience.
- There are lots of useful general writing guides online – see, for example, [Crystal Mark](#) or the [GDS Content style guide](#).

### The proof of the pudding

It's like tasting your cooking – you need to check your work as you go. If possible, even just with colleagues, run your draft copy past some people who aren't closely related to the consultation design and see if it's actually coming over as intended.

Consider asking:

- Was there anything you didn't understand?
- Could you read everything within the time suggested?
- Would a glossary be helpful?



## Our survey says...

Good survey design is absolutely crucial to running an effective online consultation. It has huge implications for the quality and volume of response you receive, your analysis processes and the suitability for the audience.

Survey design covers everything from how many questions you ask, what type they are, what information is included, the logic and flow through your consultation and how it is configured for analysis.

## All the difference in the world

As we keep on saying, the golden rule for effective consultation is **make it work for the audience**. That goes as much for the survey design as every other aspect of consultation creation and promotion.

This is all about usability, the quality of people's interaction with you and the ability to produce questions that render useful responses.

## A wealth of options

Citizen Space, like most modern survey tools, includes a plethora of question types, answer components and other features to let you build a comprehensive and appropriate consultation. You can read an exhaustive overview of these at <https://delib.zendesk.com/forums/20612257-Online-survey-consultations>. But here are a few select highlights that it's worth being aware of when planning your consultation.

### Rich content

You can embed all sorts of rich content within Citizen Space: pictures, videos, audio streams and more. This can greatly enhance your communications and also become a powerful tool in making consultations more accessible. For example, a consultation on national care standards used embedded SoundCloud audio files of someone reading the entire consultation document aloud so that people with visual impairments could listen to the content rather than read it.



[Listen to the care standards audio embed here](#)

### Fact banks

A useful way of presenting information to participants is to add it to a drop-down 'Fact Bank' within the survey. This allows you to include large amounts of information, or small pieces of pertinent contextual detail, without overloading the central flow of the consultation.



[Using Fact Banks](#)

### Routing and skip logic

There are three types of survey within Citizen Space:

- linear (standard survey type for short consultations)
- non-linear (splits surveys into chapters; useful for larger consultations)
- skip logic (displays different questions depending on previous answers; useful for consultations with diverse audiences)



[Learn more about survey types](#)

## Getting it out there

### If a tree falls in the woods...

Promoting your consultation means more than just getting it uploaded to Citizen Space. This is about how you are going to actively ensure that as many people as possible from your target audience are aware of the exercise, and are given the opportunity to participate.

Promotion can take many forms and can utilise different channels and techniques. You may wish to contact the relevant Marketing, Communications or PR teams to establish what resources are available to help you with this.

### No consultation without promotion

It's imperative that your audience is aware of the consultation or decision-making process that you're undertaking.

If you don't take adequate steps to build awareness, you risk invalidating the exercise, as you can end up with few to no participants. Without reasonable efforts to promote your consultation, you may even wind up subject to judicial review.

### Everyone wants to know about it

Good promotion is in everyone's interest:

**You personally:** because you don't want to waste all the work you've put in to creating the survey (building something great and only having 6 people respond rarely feels good).

**The organisation:** because effective consultations, with good response rates, improve decision-making, openness, transparency and communications.

**The public:** so that they have maximum opportunity to participate in democratic governance (and because no one wants to feel like a decision was 'sneaked through').

### Use your existing networks

- You may already have a list of key stakeholders. What means do you have for contacting them?
- Cluster your promotion as close together as possible. For example, you could launch it with a message to key stakeholders then include it in an email roundup, tweet it from your corporate account and mention it in a general newsletter – all within a week of each other.

### Identify channels for new audiences

It's often useful to reach out to your target audience in places where they're already talking, whether that be on or off-line. In doing so you can save a lot of time and effort by not recreating something that already exists.

To support this approach, a basic understanding of, and appreciation for, networks will help to increase the impact of your promotions. Your key stakeholders can often be gateways to much larger audiences.

Social media can be a very effective channel for reaching out to networked audiences, although a simple email mail-out asking for endorsement from trusted stakeholders can be just as effective.

### General top tips

- A defined and understood audience also aids promotion. This is particularly true if you need to promote your consultation at scale.
- Cluster your promotions so there's plenty of overlap in people's opportunity to see it.
- Leave no channel unturned – emails, physical newsletters, social media, in person conversations and events.
- Utilise existing networks to vastly amplify your reach.
- Consider 'what good looks like' early on and evaluate it at the end of the exercise, to improve the effectiveness of your next consultation.

## Analysis and reporting

### Analyse this

Analysis is a key part of any consultation process. One important lesson is that although the actual analysis work may happen after a consultation has closed, don't leave it till then to think about it!

It's essential to have a plan and process lined up for response analysis right from the start of the consultation design, as this is often linked to your audience mapping and survey design.

Analysis is heavily impacted by the resource that's available to undertake it, so effective early consideration is vital to avoid long days and/or long delays.

### No consultation without analysis

It's important to remember that unless you can extract useful information from the responses to a consultation, there is little point in running it. (It might just about count as a PR exercise but consultation as PR is a disastrous idea).

In many instances, there is also a legal requirement to demonstrate that you have effectively listened to the responses you received, with the potential that such processes are audited.

It should go without saying that you can't effectively report on a consultation if you can't analyse the responses to it and gain the insight you require. Happily, by preparing for a few basic processes, you can save yourself lots of time and ease the burden of the process.

### Call for evidence

As an example of how you might want to think about analysis, let's imagine you're running an early stage call for evidence consultation. These are open by design, and invariably involve lots of free text questions. From a research perspective, you'll want to understand key themes from a varied audience.

Because of all the qualitative responses you're going to get, you'll want to establish an effective thematic coding process, as a way of *identifying* the key themes. You can then use this to inform a more targeted follow-up consultation to investigate these themes in more detail.

### Coding

Coding is the process of layering in quantitative data to qualitative responses.

Citizen Space has a feature to make coding easy. Find out more about how to use it at <https://delib.zendesk.com/home>

### Making sense of responses

You can generate a chart on pretty much anything, and consultations may provide you with a whole wealth of varied and interesting-sounding statistics. But the goal of analysis is not numbers, it's insight.

To avoid falling into the trap of reporting for its own sake, write some questions – using 'normal language' – to which you want to know the answer before starting your analysis (e.g. 'how much enthusiasm is there in the area for a new bus stop?').

Then, when it comes to the analysis and reporting phase, revisit these questions and make them the priority of your number-crunching. Use the information you've collected to try and answer these questions first and foremost. And, where possible, structure your reporting around them as well.

## Closing the loop

### ABC: always be closing

Closing the loop is all about not abandoning a consultation once you've produced a formal report, summarising the responses you've received. It's about feeding back learnings and the impact the consultation responses have had, to people who can benefit from them – primarily, those who participated and others involved in running the consultation.

Formal consultation reporting, of course, remains an essential function of good consultation, but that isn't to say you can't improve the quality of your reporting thereby helping to increase buy-in from your audience.

### Too good an opportunity to waste

There will often be a legal requirement to (at the very least) present a summary report for your consultation. More than that, though, reporting back is also a great opportunity to:

- Honour the unwritten contract with the public.
- Build engagement over time. This helps to increase engagement with future involvement opportunities and **builds trust** in the decision making process and outcome.
- Learn from past experience and improve your practice.
- Raise visibility and increase the credibility of a policy or decision that was consulted upon.

### More than a doc

Most consultations provide a summary response document and publish the permitted responses, but reporting can also allow you to present messages in an engaging and easily digestible format.

Remember: your report is also a message. It might be an interpretation of a particular technical objection from a key stakeholder or an overwhelming bloc of public opinion on an environmental issue. It might be examining a sharp divide in preferences, or drawing out where there is considerable consensus. Whatever the case, your report will need to acknowledge the cumulative trends and insight gained. As such, it can be helpful to explain complex issues in more engaging formats which aid the public's understanding of an issue.

Any form of consultation report will always need to be rigorous but there are many simple ways to supplement it with other channels.

A video of a minister explaining a decision using YouTube, or an infographic explaining how a data-driven decision was reached can greatly aid understanding.

You could even consider releasing a key data set for the public to explore for themselves.

### WAYSWD

Learn to love this acronym! It stands for 'We Asked, You Said, We Did' – a couple of short lines to tell people the question you initially posed, the key things you heard in response and the actions you've taken as a result. (We found it such a consistently effective way of feeding back on completed consultations that we built it into the Citizen Space workflow).

WAYSWD is a really useful tool for helping to provide a succinct summary of a consultation in its entirety, for those who may not have the time or indeed, the energy, to read a long consultation report. It seems simple but forcing yourself to condense a detailed process and findings into a few brief sentences is a surprisingly effective discipline both for public communication and holding yourself to account.

### More info

There are loads more details, tips and tricks on our online knowledge base: [delib.zendesk.com](https://delib.zendesk.com)

### See examples in practice

You can also check out thousands of online consultations from all sorts of public sector organisations at [aggregator.delib.net/citizenspace](https://aggregator.delib.net/citizenspace)

# Questions for reflection

## **Audience**

Did we understand our audience? Did we build it for them from the get-go?

## **Language and content**

Was the survey easy to understand?

## **Survey design**

Did we ask the questions we needed to get actionable insight?

## **Getting it out there**

What sort of response rate did we generate? Could we have done more to make people aware of the consultation?

## **Reporting and analysis**

Did we take the necessary steps to generate insight (and not just numbers) from our analysis?

## **Closing the loop**

Did we feed back to participants? Did they feel heard?



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# Beware of the leopard

“You hadn't exactly gone out of your way to call attention to them had you? I mean like **actually telling anyone or anything.**”

“But the plans were on display...”

“On display?! I eventually had to go down to the cellar to find them.”

“That's the display department.”

“With a torch.”

“Ah, well the lights had probably gone.”

“So had the stairs.”



“But, look, you found the notice didn't you?”

“Yes,” said Arthur, “yes I did. **It was on display in the bottom of a locked filing cabinet stuck in a disused lavatory with a sign on the door saying 'Beware of the Leopard'.**”

Douglas Adams, The Hitchhiker's Guide to the Galaxy