



NEOUPA - Northeast Ohio Usability Professionals' Association

Card Sorting vs. Texas Hold 'Em What's Better for Site Navigation?

October 23, 2008





NEOUPA Business

- ▶ World Usability Day November 13
 - Event Registration Now Open (NEOUPA.org)
 - Still accepting Sponsors & Volunteers
- ▶ Holiday Party December 4
 - Co-sponsored with The Web Association
 - Details coming soon (WebAssociation.org)
- ▶ Panel Introductions
 - Cathy Zapata, VP & Web Business Leader, KeyBank
 - Jeff Janis, Senior Usability Consultant, Progressive



Traditional Card Sorting *To Organize & Categorize*

Jeff Janis, Senior Usability Consultant,
Progressive



Traditional Card Sorting - Organize

What and Why of Card Sorting

Actual users of your site or application organize the content in a way that makes sense to them (users' mental model)

- ▶ Organize & prioritize new features and functions, content of the site
- ▶ Fast & easy
- ▶ Based on user input - needs / wants / desires
- ▶ Logical and expected navigation structure
- ▶ Opens up new categorization / labeling opportunities
- ▶ Low cost for high volume participation



Traditional Card Sorting - Organize

Card Sorting Types

- ▶ Open Sort - participants group topics into categories and label the categories
- ▶ Closed Sort - participants group topics into pre-defined categories
- ▶ Open sort followed by or concurrently conducted with a closed sort

Card Sorting Methods

- ▶ Manual
- ▶ Online



Traditional Card Sorting - Organize

Card Sorting Methods

Manual Card Sorts - in person

- ▶ Topics on index cards
- ▶ Blank cards to write in category (open)
- ▶ Predefined category cards (closed)
- ▶ Limited number of participants in a day
- ▶ Transfer cards/category labels to online tool for analysis (EZSort / EZCalc)
- ▶ Limited number of participants



Traditional Card Sorting - Organize

Manual Open Card Sort - In Progress





Traditional Card Sorting - Organize

Online Card Sorting Sites

- ▶ Advantage - more participants (minimum of 20-30)
- ▶ Shorter time period
- ▶ Multiple tests with different groups
- ▶ Sites provide reports or downloads
- ▶ Compensate participants
- ▶ Easy set up



Traditional Card Sorting - Organize

Online Card Sort Steps

- 1) Create descriptive topic cards (optional definitions)
- 2) 50 cards ideal / 100 too many
- 3) Recruit - mixed demographics
- 4) Compensate - gift checks or Amazon gift cards
- 5) Determine time frame
- 6) Set up project in tool
- 7) Launch project
- 8) Send out e-mail invite with instructions
- 9) Analyze results / recommendations
- 10) Meet with team



Traditional Card Sorting - Organize

Card Sorts at Progressive

Agent quoting & servicing site
(open / manual - 2005)

Intranet Redesign (open / manual 2005)

Policy servicing site (online - 2008)
- open & closed for policyholders,
agents, customer service reps and
processors



Traditional Card Sorting - Organize

Online Card Sorting Tools

OptimalSort

<http://www.optimalsort.com/>

Mind Canvas

<http://www.themindcanvas.com>



Traditional Card Sorting - Organize

Open Card Sort Results

- ✓ How did users organize and categorize content?
- ✓ Does structure (or taxonomy) match users' mental model?
- ✓ Categories and groups with most/least agreement?
- ✓ Similar category labels? (common words)
- ✓ Prioritize the groups based on users' tasks?



Traditional Card Sorting - Organize Card Sort Input to Design

- ✓ Meet with team to show/discuss results
- ✓ Let business / design team analyze the expected/unexpected findings
- ✓ Business / design determine direction
- ✓ Follow-up with usability navigation tests
- ✓ Further adjust the navigation framework / labels due to usability performance



Traditional Card Sorting - Organize

Questions & Answers



Non-Traditional Card Sorting *To Prioritize*

Cathy Zapata, VP & Web Business Leader,
KeyBank



Non-Traditional Card Sorting: To Prioritize

- ▶ The card sorting technique is also a powerful tool to prioritize potential features / functionality / content
- ▶ Like a traditional sort, it's fast & easy, takes the guesswork out of design, and is based on user needs / wants / desires
- ▶ Developed by Mike Kuniavsky & Jesse James Garrett from Adaptive Path



Non-Traditional Card Sorting: To Prioritize

Instructions:

1) Create cards / items to prioritize

- Identify items to prioritize by looking at existing features / functionality / content, looking at competitors, internal and external brainstorming, primary & secondary research
- Be descriptive; Short enough so it fits on one card, but long enough so it's comprehensible
- Shoot for 52 cards max
- Make sure you have a clear understanding of the intent of each idea behind the card



Non-Traditional Card Sorting: To Prioritize

2) Recruit participants

- Can be part of a usability test, one-on-one interview, mall intercept, or a stand-alone
- User compensation varies depending on audience and length of time
- “Panels” are an easier way to recruit, but should be avoided if possible
- 10 participants minimum



Non-Traditional Card Sorting: To Prioritize

3) Prepare for testing day

- Consider online test if there are observers so they can see items being sorted
- Consider video-tapping for later reference
- Gather sticky notes, cards, paper clips
- Create 4 sticky notes for, “Most Valuable,” “Somewhat Valuable,” “Least Valuable” and “Not Valuable”
- Create 3 sticky notes for, “Rarely,” “Sometimes” and “Often”



Non-Traditional Card Sorting: To Prioritize

- 4) Conduct the sort (preferably in person)
 - Explain the exercise and prep the user
 - Have participant read the statement or sentence on the card (out loud if there are observers)
 - Have participant place the card into one of the 4 piles of *Most to Not Valuable*
 - Have participant talk out loud to learn reasoning and ensure comprehension



Non-Traditional Card Sorting: To Prioritize

4) Conduct the sort (continued)

- Once all cards are sorted, have the participant re-sort items in the *Most Valuable* pile based on frequency of use
- Have participant place the card into one of the 3 piles of *Rarely to Often* use



Non-Traditional Card Sorting: To Prioritize

5) Evaluate the Results

- Assign numerical rating to each item sorted:
 - 0 = Not Valuable
 - 1 = Least Valuable
 - 3 = Most Valuable; Rarely Used
 - 4 = Most Valuable; Sometimes Used
 - 5 = Most Valuable; Often Used
- Calculate median value of each item
- Calculate standard deviation to further narrow down results



Non-Traditional Card Sorting: To Prioritize

Tips:

- ▶ Like a usability test, take the time to appropriately prep users
- ▶ When asking to sort based on value, make sure you stress the importance of ranking based on how valuable they feel it is to them
- ▶ Take into consideration if user does not understand what the item is, even after explained
- ▶ Ranking by frequency of use is an added step, but a great one to help evaluate which items have immediate value - stress that this is based on how they use the web right now



Non-Traditional Card Sorting: To Prioritize

~ Sample Exercise ~



Online Card Sorting Tools



Online Card Sorting Tools

- ▶ OptimalSort (optimalsort.com)
 - Example: <http://ibo.optimalsort.com/ibv/>
- ▶ EZSort
- ▶ MindCanvas
- ▶ Usort
- ▶ CardZort
- ▶ WebSort
- ▶ uzCardSort



Online Card Sorting Tools

web sort

Introduction:
This is a card sort for a fictitious airport. Assume that the airport wants to revise its web site, which contains a variety of content. Your task is to organize the items into groups that are logical to you, and give each group a name that describes its contents.

This exercise takes about 10 to 20 minutes. You must do the exercise in one sitting.

Instructions:
Create groups by dragging items from the list into folders. What items belong together? Think of a grocery store -- milk, cheese and butter are in the Dairy section and apples and oranges are in the Fruit section.

To name a group, double click on its folder and type the name -- a word or brief phrase that describes the items in the group. You may name groups at any time. You can also rename groups and rearrange grouped items.

You may create as many groups as you like, but make sure that you think about how the items relate to each other. If you have a group with a large number of items, you may want to split it up. If an item doesn't fit with any others, you may put it in a group by itself.

Thanks for your help!

[View animated demo](#) [Start the exercise](#)



Non-Traditional Card Sorting - Prioritize

Questions & Answers