

Card Sorting Techniques

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Learning Goals

- Be able to use card sorting techniques
- Be able to do Structured Dialogic Design
- Help with the prototyping

What is Card Sorting?

Card sorting is a technique that up until now has been popular to organise the structure and information architecture of a website.

Over the years this tool has evolved with several techniques to be used in organising the information architecture (and therefore content) of a software system.

Basic and Advanced Card Sorting

There are different ways in which people decide to perform card sorting. I will have references for you at the end in order for you to be able to pick one that is appropriate for you. However, I will be showing you what techniques I have used successfully, tried and tested that you need to be aware of. To do this, we will be going over the basic principle of card sorting and also an advanced technique for collaboration in a team called “**Structured Dialogue Design Process - SDDP**”.

OK so what IS Card Sorting...

Not to be confused with the practise of card counting in Casinos... card sorting basically gives you a way to structure the pages on your website, or the menus on your software. It also gives you a way to decide on content and where to put it. Here is a simplified version of card sorting to get you going.

Open or Closed Card Sorting?

- **Open Card Sort:** Participants are asked to organize topics from content within your website into groups that make sense to them and then name each group they created in a way that they feel accurately describes the content. Use an open card sort to learn how users group content and the terms or labels they give each category.
- **Closed Card Sort:** Participants are asked to sort topics from content within your website into pre-defined categories. A closed card sort works best when you are working with a pre-defined set of categories, and you want to learn how users sort content items into each category.

Card Sorting – What you will need

1. Lots of post its of one colour (for this exercise I will call these yellow)
2. Smaller amount of post its of a separate colour (for these slides I will call this blue)
3. Marker Pens
4. Different colour post its for important flags (I will name these red for now)

Card Sorting (Open) – Step 1

Ask your participants to sort out categories on the blue post it notes (if you want, you can encourage your participants to also categorise them in ascending order of importance).

Category 1

Category 2

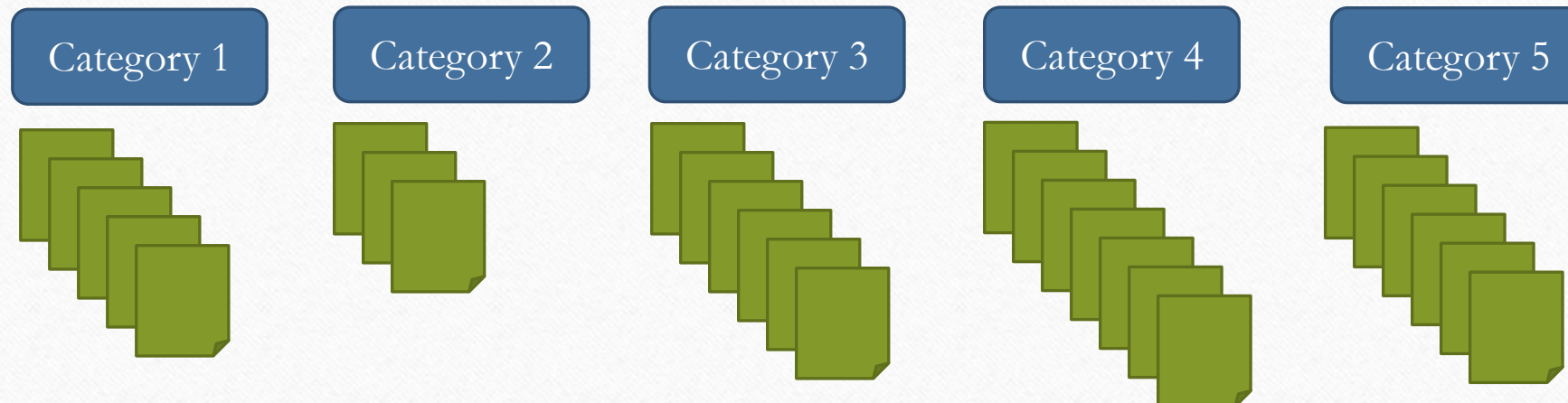
Category 3

Category 4

Category 5

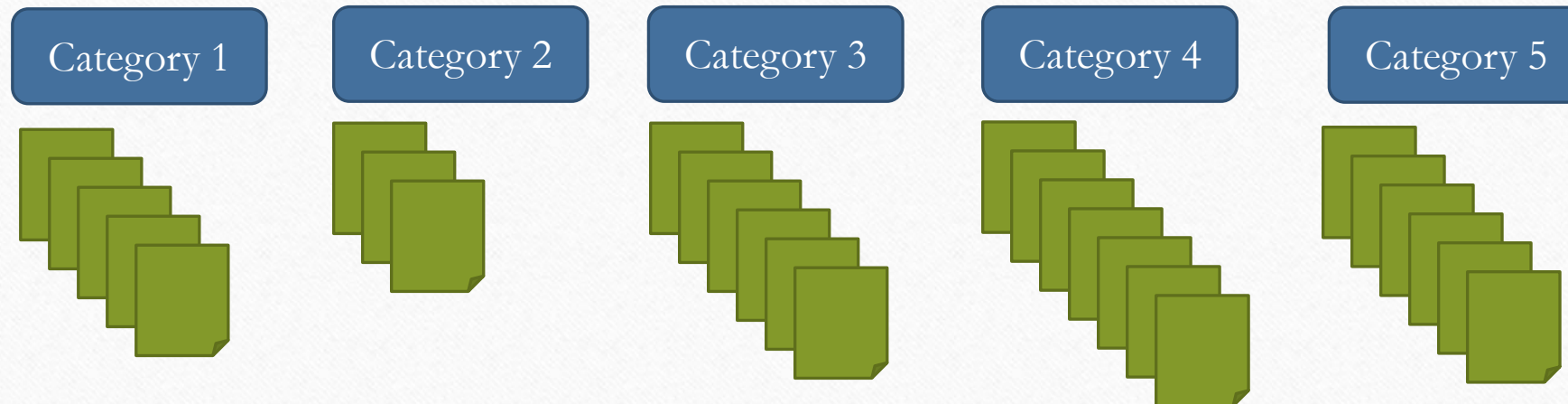
Card Sorting (Open) – Step 2

In this task you are to ask your participants to sort out topics on the yellow post it notes.



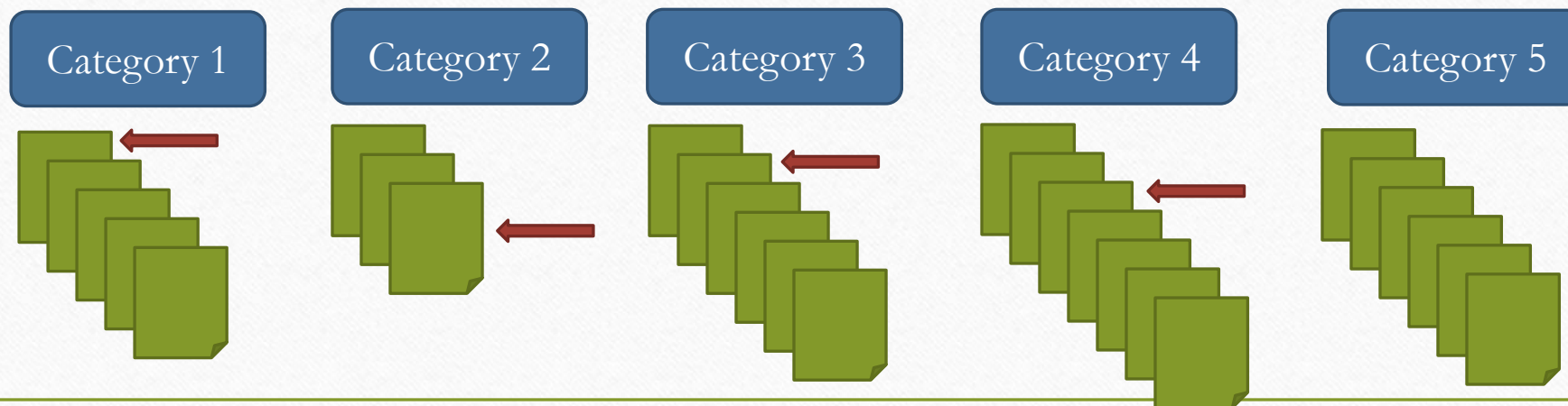
Card Sorting (Open) – Step 3

In this task you are to ask your participants to sort out topics on the yellow post it notes into level of importance (most important on the top to least on the bottom).



Card Sorting (Open) – Step 4

You can optionally give the opportunity for your participants to label some of the yellow post its as “important”. This is an extra step to denote something that they consider needing extra attention. I personally do not use this step but use a similar one in indicating vital / non vital labels.



Card Sorting (Open) – Step 5

Take Pictures...

Take pictures of individual participant's layouts and then use visual inspection or analysis to do the exercise of determining what the final layout / structure will be.

NOTE: in Closed card sorting this is much easier..

Structured Dialogic Design

In short and sweet:

- 1) A process for allowing everyone to have an opinion
- 2) A process for allowing everyone to contribute to the final product
- 3) A process to bring together different stakeholders and allowing them to speak the same language

SDDP (structured dialogue design process)

Step 1

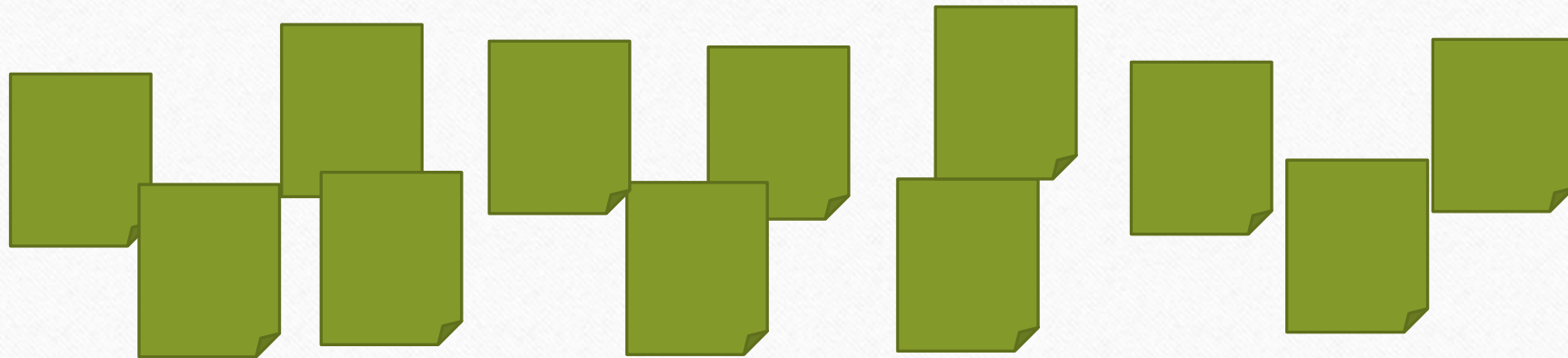
Give a trigger question or give the participants a brief to be able to think about.

Define it as well as you can without giving functional or non-functional requirements yourself as the investigator unless they are vital.

SDDP (structured dialogue design process)

Step 2

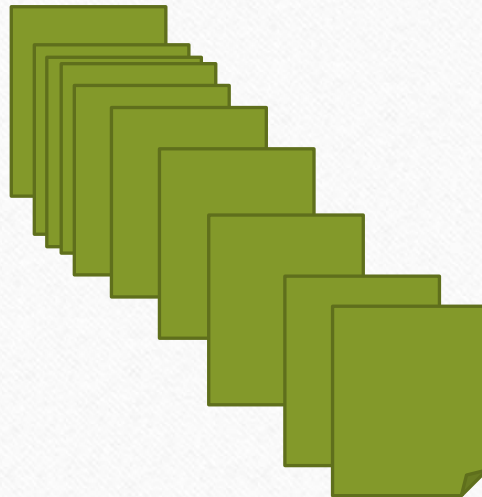
Give a set amount of time for everyone to write down what requirements they have based on that trigger question, summarising them as a word or VERY short phrase on a post it each.



SDDP (structured dialogue design process)

Step 3

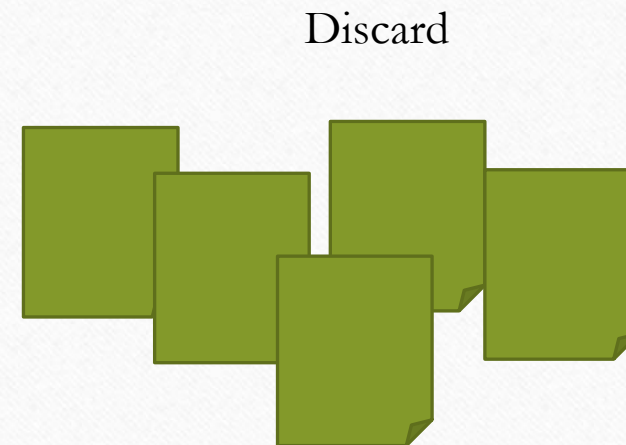
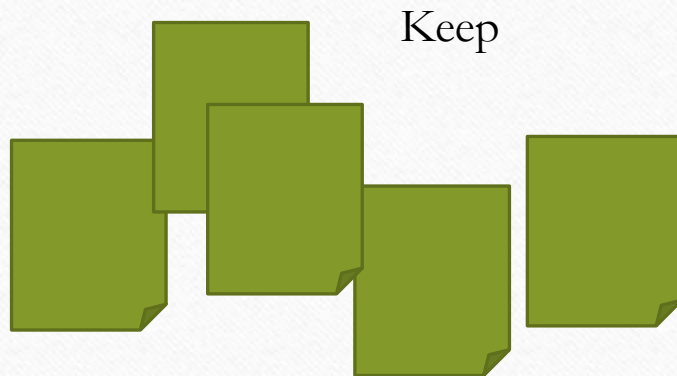
Ask for everyone to rank their post its based on importance



SDDP (structured dialogue design process)

Step 4

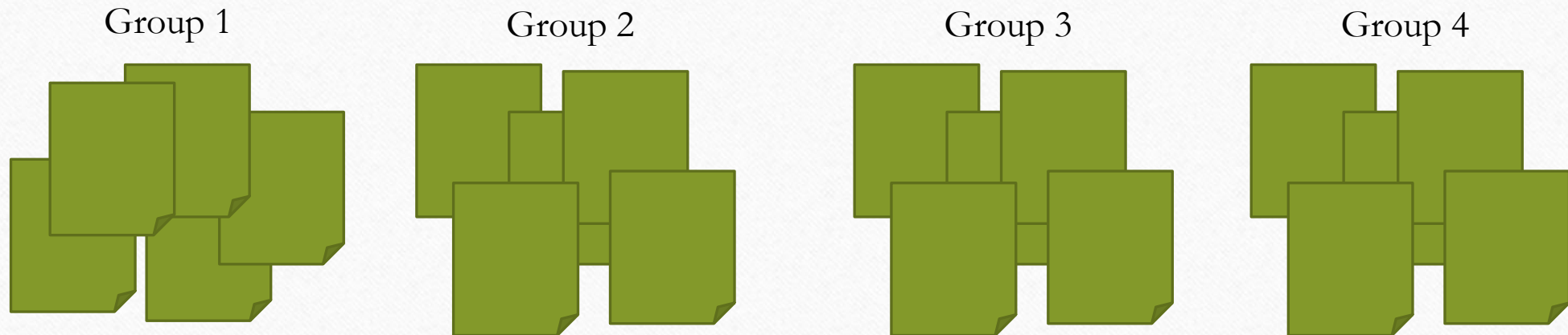
Use a (fast) round robin approach to explain one idea per participant at a time. The other participants then throw away their post it note if the idea has already been presented by another participant. **IMPORTANT:** no objections or criticisms are allowed!



SDDP (structured dialogue design process)

Step 5

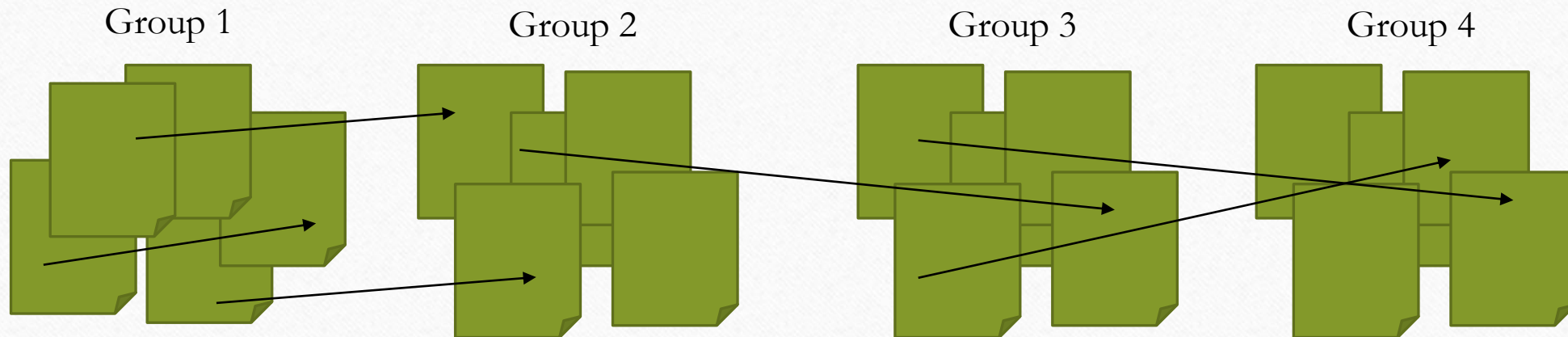
The participants now choose themes and topics and in a round robin approach put the ideas into a topic. This process is repeated until some agreement is made for the groups



SDDP (structured dialogue design process)

Step 6

The last step is a causality $A \rightarrow B$ which identifies which actions are dependent on others. We can again use a round robin and then vote as to the validity (more than 50% agreement needed).



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References

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