Card Sorting

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Executive Summary

Goals

Conduct a card sort test to understand how users think and provide valuable insights into how they perceive the website's organization and group features.

Methodology

An open card sort test was conducted with seven cards, each labeled with a feature of the website, with a total of five participants over three days. Participants were asked to group like cards and then apply a label or name to each grouping.

Top Results

- The most common pairings focused on reading and writing reviews for contractors.

- "List yourself as a contactor" and "View a list of reviewers" were called out as the loner card or not knowing where to group.
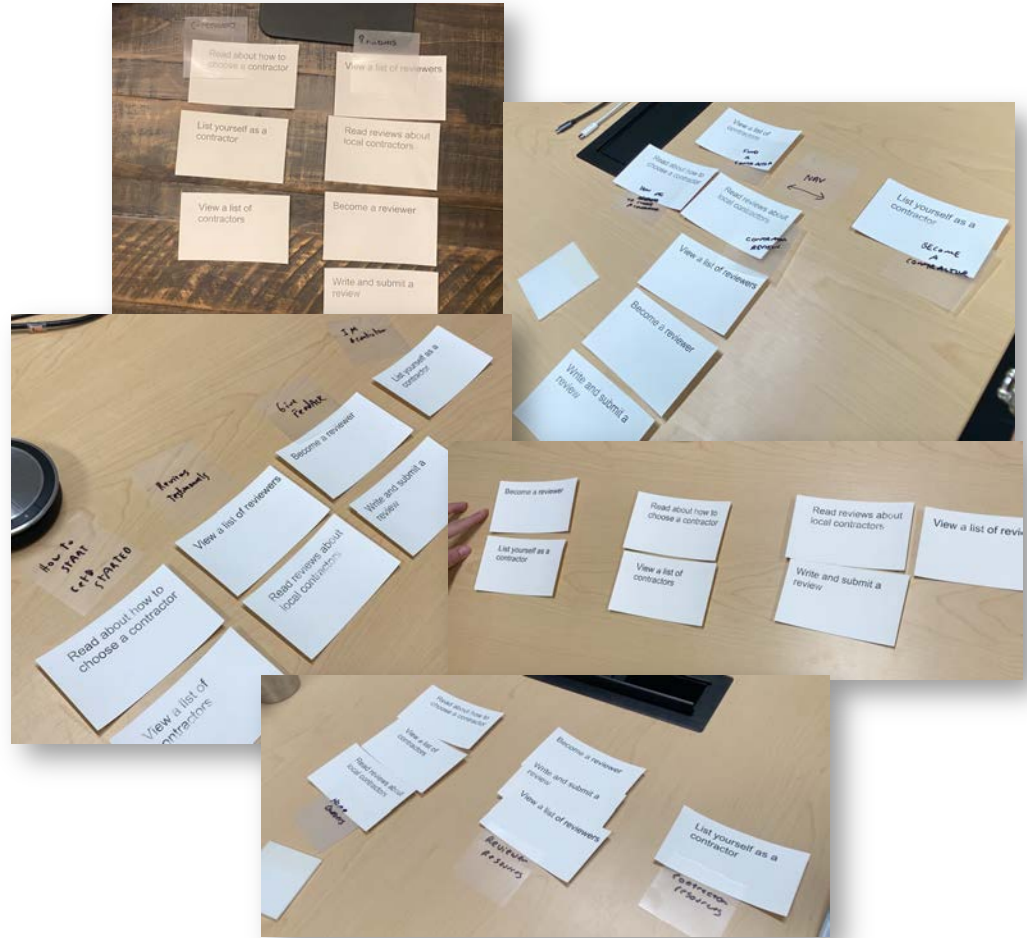
Recommendations

- Group all activities related to reviewing or reviewers

- Make "Become a Reviewer" and "List yourself as a contractor" account sign-up tasks.

- "Read about how to choose a contractor" should be a help or resource article.

Data Collected

The facilitator collected two forms of data:

Qualitative: Names given to grouping, as well as any comments made by the participants.

Quantitative: Quantitative data, including card sort, similarity matrix, and frequency of similar terms used.

Participant Groups & Labels

	Participant 1 – Jason Duration: 5:14	Participant 2 – Stacey Duration: 4:32	Participant 3 – Sarah Duration: 3:59	Participant 4 – Renee Duration: 9:49	Participant 5 – Kevin Duration: 4:03
Group 1	C3, C5, C7 – "Contractors"	C1, C3, C5 - "Homeowners"	C6, C7 - "Sign Up" (Intro)	C5 - "How to choose a contractor" (Help Resource)	C3, C5 - "How to get started"
Group 2	C1, C2, C4, C6 – "Reviews/Reviewers"	C2, C4, C6 - "Reviewer Resources"	C3, C5 - "Find Contractor"	C3 - "Find a Contractor"	C1, C4 - "Reviews/Testimonials"
Group 3		C7 - "Contractor Resources"	C1, C2, C4 - "Review" (Vetting)	C1, C2, C4, C6 "Contactor Reviews" (Sub-category of Find a Contractor)	C2, C6 - "Give Feedback"
Group 4				C7 - Become a Contractor	C7 - "I'm a Contractor"
Quotes	"I'd want to have two groups—one for reviewers and one for contractors." "My thought process is you have two categories: if you're looking for contractors or be a contractor, and if you want to review, that would be on a separate page."	"I feel like 'become a reviewer', 'write and submit a review' and 'list of reviewers' should all be together because it's the path of reviewing." "This 'list yourself as a contractor' feels different from all of them."	"[View a list of reviewers] seems weird." "'Become a viewer' and 'list yourself as a contractor' is kind of like a sign-up process like when you go to Grub Hub – are you a driver or are you ordering?"	"'Read reviews about contractors' is probably the top priority." "[Become a viewer] and [View a list of reviews] is a sub-page of [Read reviews about local contractors] page." "[Read about how to choose a contractor] seems like it could be a whole blog section about or an article."	N/A

Key	
C1	Read reviews about local contractors
C2	Write and submit a review
C3	View a list of Contractors
C4	View a list of reviewers
C5	Read about how to choose a contractor
C6	Become a reviewer
C7	List yourself as a contractor

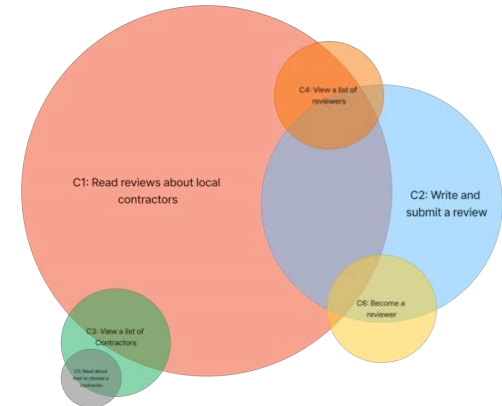Word Cloud visually shows the most prominent or frequent words used for group names/labels.

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Card Groupings/Similarities

The following similarity matrix compares two cards and scores them based on how many participants agreed with the pair.

	Participant 1	Participant 2	Participant 3	Participant 4	Participant 5	
Card Pairs	Sum across each row to calculate pairwise similarity ratings					Similarity Ratings
C1 + C2	1		1	1		**= 3**
C1 + C3		1		1		**= 2**
C1 + C4	1		1	1	1	**= 4**
C1 + C5		1				= 1
C1 + C6	1			1		**= 2**
C1 + C7						= 0
C2 + C3				1		= 1
C2 + C4	1	1		1		**= 3**
C2 + C5						= 0
C2 + C6	1	1		1	1	**= 4**
C2 + C7						= 0
C3 + C4				1		= 1
C3 + C5	1		1		1	**= 3**
C3 + C6				1		= 1
C3 + C7	1					= 1
C4 + C5						= 0
C4 + C6	1					= 1
C4 + C7						= 0
C5 + C6						= 0
C5 + C7	1					= 1
C6 + C7			1			= 1
Total	**9**	**4**	**4**	**9**	**3**	

Key	
C1	Read reviews about local contractors
C2	Write and submit a review
C3	View a list of Contractors
C4	View a list of reviewers
C5	Read about how to choose a contractor
C6	Become a reviewer
C7	List yourself as a contractor

Euler diagram demonstrates the hierarchies and connections between cards.
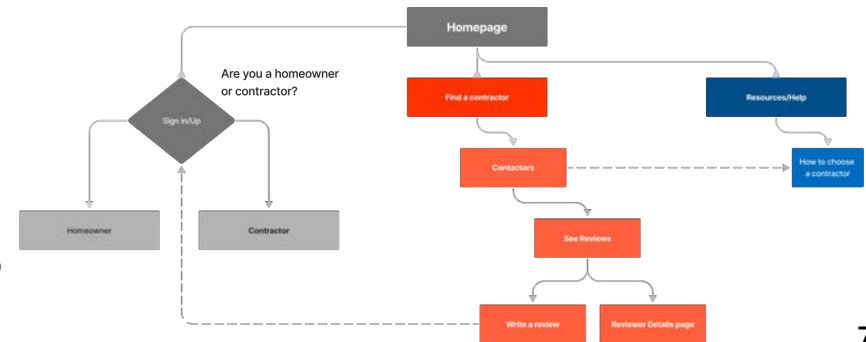

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Results & Recommendations

- Given the limited number of participants, some commonalities were strong, with 4/5 participants agreeing.

- The most common pairings focused on reading and writing reviews for contractors.

- Popular group names included "contractor," "reviews," and "resources."

- "List yourself as a contactor" and "View a list of reviewers" were called out as the loner card or not knowing where to group.

Feature	Update label on site
Read reviews about local contractors	See Reviews
Write and submit a review	Write a review
View a list of Contractors	Find a contractor
View a list of reviewers	[List as reviewers screen names] > Reviewer detail page
Read about how to choose a contractor	Resources or Help > How to choose a contractor
Become a reviewer	Sign up > Homeowner
List yourself as a contractor	Sign up > Contractor

Recommendations

- Group all activities related to reviewing or reviewers.

- Make "Become a Reviewer" and "List yourself as a contractor" account sign-up tasks.

- "Read about how to choose a contractor" should be a help or resource article.

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Conclusion

Card sorting studies have some limitations when it comes to mapping information architecture. Generally, a card sort focuses more on how information is grouped over users' tasks to get to that information. This card sort focused on tasks but also how those tasks were grouped and labeled. Pairing card sorting analysis with user testing could help an information architect define these information groupings better and more consistently.

Depending on the complexity of the informational architecture, card sorting activities and analysis could take some time, and information architects need to weigh whether an open or closed card sort is the most beneficial without exacerbating a project timeline. This study was limited to 7 tasks or areas of information, so an open card sort was the appropriate avenue of study without being overwhelmingly complex.

This study included only five participants, and although there were some similarities and shared commonalities, its findings could be validated further with a more extensive and diverse sample of users. Conducting studies with a more significant number of qualified participants is highly recommended whenever possible, but again, more participants means more analysis time.

Appendix

Excel doc and Session recordings/images

	Participant 1	Participant 2	Participant 3	Participant 4	Participant 5		Similarity Ratings	Key	
Card Pairs		Sum across each row to calculate pairwise similarity ratings						C1	Read reviews about local contractors
C1 + C2	1		1	1			= 3	C2	Write and submit a review
C1 + C3		1		1			= 2	C3	View a list of Contractors
C1 + C4	1		1	1	1		= 4	C4	View a list of reviewers
C1 + C5		1					= 1	C5	Read about how to choose a contractor
C1 + C6	1			1			= 2	C6	Become a reviewer
C1 + C7							= 0	C7	List yourself as a contractor
C2 + C3				1			= 1		
C2 + C4	1	1		1			= 3		
C2 + C5							= 0		
C2 + C6	1	1		1	1		= 4		
C2 + C7							= 0		
C3 + C4				1			= 1		
C3 + C5	1		1		1		= 3		
C3 + C6				1			= 1		
C3 + C7	1						= 1		
C4 + C5							= 0		
C4 + C6	1						= 1		
C4 + C7							= 0		
C5 + C6							= 0		
C5 + C7	1						= 1		
C6 + C7			1				= 1		
Total	9	4	4	9	3		0		

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