Playing with a Bad Deck

The Caveats of Card Sorting as a Website Redesign Assessment Tool

Linda O’Dwyer, Communications Coordinator and Education Librarian
Michelle Frisque, Head, Information Systems
Jim Brucker, Instructional Design Librarian

1. Don’t use a card sort to de-jargonize

If users don’t understand the concepts, the time you spend explaining things to them will distract from the action of sorting and grouping. Also, users may employ their own type of jargon, so it will be difficult to consolidate the results of different users. Some of them may use the same word or phrase to describe something that is actually different, resulting in even more confusion of jargon. De-jargonize BEFORE your card sort. This is in reality a surveys, interviews and focus groups. Streamlines the language before having people sort it out for you. That way the action of grouping similar terms will not be delayed by the time-outs needed to define those terms.

2. Provide some degree of guidance (Closed-Category Card Sort)

This streamlines things even more. Allowing users to define their own categories is noble, but also results in disparate data sets. You may create hyper-specialized categories based on your own expertise, resulting in fewer categories common to all users.

3. Limit your audience (Focus your goals)

An academic health sciences library may need to simultaneously serve the needs of students, faculty researchers and staff but that doesn’t mean that all of these users, each with a different perception of the library, should be expected to participate in the same card sort.

You might need to tailor the tool to different groups, and analyze the data of each group separately. The more participants you have from a particular group, the better. However the more disparate you have amongst the basic perceptions of your users, the harder it will be to lump them all together into a single one-size-fits-all meta-phenomena.

4. Provide equal training for the facilitators

There will always be one or two facilitators who have a greater understanding of the tool. In order to maintain homogeneity within your data, you should group-attack all of your facilitators and make them practice sorts with each other.

5. Run pilot sessions and test the data analysis method

Run several pilot card sorts with library staff and some volunteers from outside the library. Make sure you can collate your data into something that you can understand, and do before you have started collecting the majority of your data.

6. Be careful with the language of your introductions

Be careful not to use “leading” language at the beginning of a session. Otherwise, the participants might be trying to create a robust website navigation system, instead of just sorting the cards.

7. Record a detailed debrief interview after each sort

Always walk through each category so that you clearly understand what a user intended. The people analyzing the data might not be the same people who facilitated the sorting. Always walk through each category so that you clearly understand what a user intended.

The Galter Library implement Card Sorting?

The Galter Health Sciences Library, which is an academic library serving students, staff and faculty of both Northwestern’s Feinberg School of Medicine and Northwestern’s Kellogg School of Management, decided to completely revamp its website from scratch. Instead of managing the current site with minor improvements, the Website Redesign Task Force was created to create a new site from the ground up.

We started by performing usability assessments of the old website, discovering some of the major issues that needed to be resolved. These included excessive use of library-specific jargon (does anyone outside the library know the term “resources?”) and an overly-complex navigation system that resulted in “buried” and otherwise unobservable services.

How did the Galter Library implement Card Sorting?

Card Sorting for Website Design

Card Sorting is generally employed to understand the way that users mentally group different ideas. A navigation scheme on a website is usually designed to match users’ expectations of how various links are supposed to be grouped. Card sorting then can be employed to revise the navigation grouping and category names that make the most sense to users.

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Three Rounds of Card Sorts:

Round 1: The “Wide-Open” Card Sort

We prepared our cards by simply copying every navigation item on our old website.

Round 2: The “Concept” Card Sort

Instead of one-word terms on each card, we used descriptive concepts. Facilitators no longer needed to explain as many of the concepts. We also tried to combine some concepts, using less cards than the first round and hopefully diminishing the intimidation of having to work through such a large array of information.

Round 3: The Internal Tool

It was strictly an in-house sorting exercise used by members of the Website Redesign Task Force to try to come up with a consensus of navigation categories. It was simply using card sorting as a method to organize our own thoughts.

The Caveats

What were our goals for the card sorting?

1. Construct a user-driven, intuitive navigation system and create a site architecture

2. De-jargonize our website

3. Limit your audience (Focus your goals)

4. Provide equal training for the facilitators

5. Run pilot sessions and test the data analysis method

6. Be careful with the language of your introductions

7. Record a detailed debrief interview after each sort

Elements to Consider

1. Closed vs. Open card sorts

2. How many cards are enough?

3. How many users?

4. How many facilitators?

5. What is Card Sorting?

A card sorting exercise is used to create categorized groups. Words or phrases are printed on individual index cards. The participant then goes through the shuffled stack of cards, one card at a time, and gradually gathers the cards together.

For instance, some cards may have the names of colors, while others may have the names of cities. The participant can then name the groups something that fits into. This can skew the results, but also streamlines both the sorting process and the data management.

“Closed” Card Sort: Category names (such as “colors” and “cities”) are already provided, so the users simply decide what each card fits into. This can skew the results, but also streamlines both the sorting process and the data management.

“Open” Card Sort: Users are encouraged to create their own category names. This has the advantage of allowing for a greater variety of groupings and new category concepts.

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