

Card Sort

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WHAT IS IT?

A card sort is a great way to get your users to help you organise your navigation and content, i.e. the information architecture, thereby helping users work through your site and achieve their goals faster. It is exactly what it sounds like, users are given cards to group and order into something that makes most sense to what they would expect, this includes whether the label itself is clear enough.

WHY DO YOU NEED IT?

As you might expect, this research is useful in helping you understand your user's expectations around site organisation and labelling. The process helps you to:

- Organise your content and navigation.
- Correctly label the content in line with your users' expectations.

WHEN DO YOU NEED IT?

The card sort will normally take place ahead of any design work. However, it can also be used on a live product where there are issues around drop-out and task completion or calls to support.

HOW DO YOU DO IT?

Preparation

1. Create your list of topics – don't go overboard – no more than 50 items.
2. Now you must decide on whether you are going for an online, e.g. *OptimalSort* software, or face-to-face sort. If online you simply add the topics online, otherwise you write/print-out the topics and groups on to individual cards, A5-A6 size. Number the back of the cards to help you record each participant's ordering. Shuffle the cards well.
3. Aim for around 15-20 participants for the sorting exercise, in order to see clear sorting patterns.

The type of sort you do depends on whether you want your participants to generate labels for the groupings

they sort into (open sort) or whether you want to test the group labels you have come up with (closed sort).

Sorting Session

The session – as is the general rule for user testing – should not take longer than one hour (it's quite intense, tiring work; don't wear out your participants).

4. If conducted online, the software usually comes with clear and concise instructions. For face-to-face, first introduce the session, show the cards and group cards (labelled or blank if to be completed by the participant). During the session, ask the participant to explain why they are grouping or positioning topics the way they are – aside from understanding their expectations, this can help identify where a label may be incorrect.
5. Try not to interrupt the participant during the session, but keep them thinking aloud. If any issues arise around the meaning of a label you can address these at the end of the session: ask the participant to think of an alternative label. Remember to shuffle the cards well between sessions.

Analysis

If you have used an online service, the analysis is done for you, otherwise you should review the ordering for each participant and look for common groupings and the ordering within those. Use the qualitative data to consider any label or group changes and any topic repositioning. Finally, use the findings to create a definitive navigational and content system.

WANT TO KNOW MORE?

More detail on card sorting:

<https://www.webcredible.com/services/investigate/card-sorting/>

<https://www.nngroup.com/articles/card-sorting-definition/>

<https://www.optimalworkshop.com/optimalsort>