

# Classic IA tools

Remember the comic books that condensed massive literary classics down to a few illustrated pages? The folks that created them got "Moby Dick" down to 12 pages; they produced a version of "Great Expectations" that could be read in 15 minutes. I've tried to do the same trick for some of the tools we use for information architecture.

Stately, plump Buck Mulligan came from the stairhead, bearing a bowl of lather on which a mirror and a razor lay crossed. A yellow dressinggown, ungirdled, was sustained gently behind him by the mild morning air. He held the bowl aloft and intoned:

Introibo ad altare dei!!!

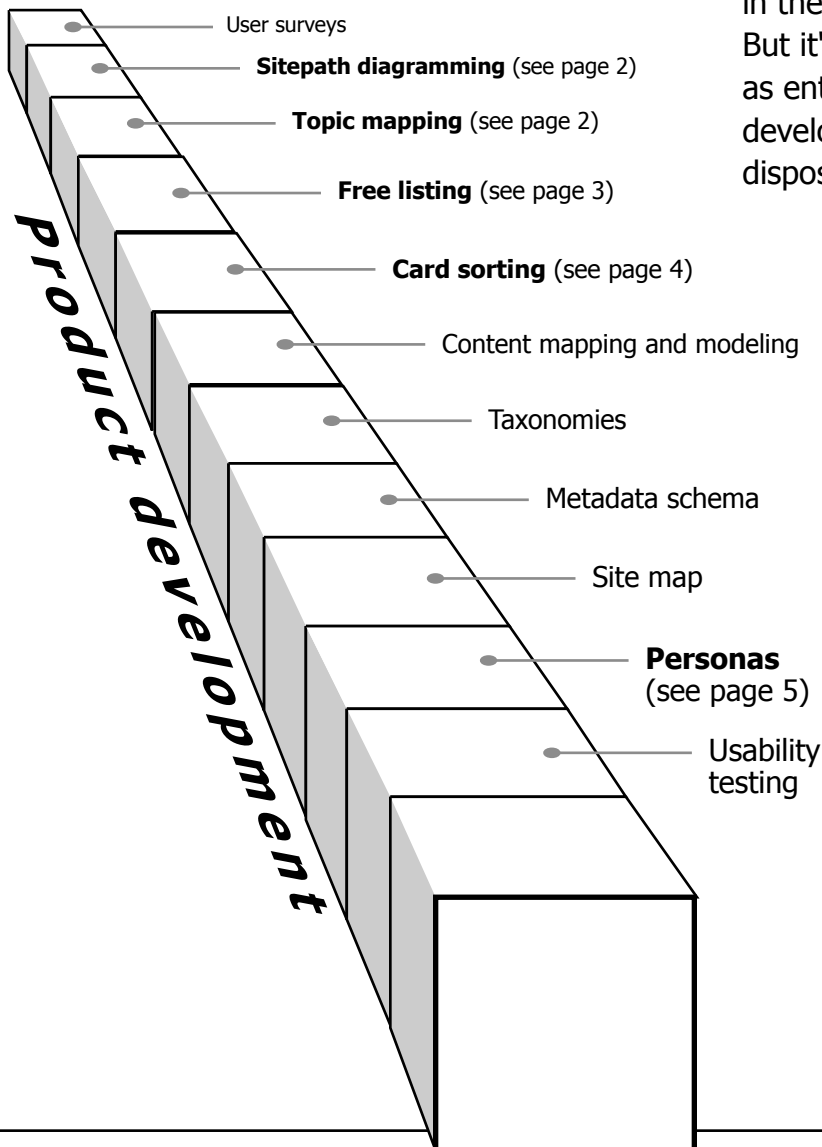


It's important to note that the overviews I've created don't replace the fine work found

in the documents I've used as my sources. But it's my hope that the overviews serve as entertaining reminders of the development options we have at our disposal.

These pages can also serve as tools in themselves, helping explain to the people we work with what we're doing and why. This may be helpful for people working as outside consultants, but it's absolutely essential for those doing IA work from within organizations.

Dan Willis



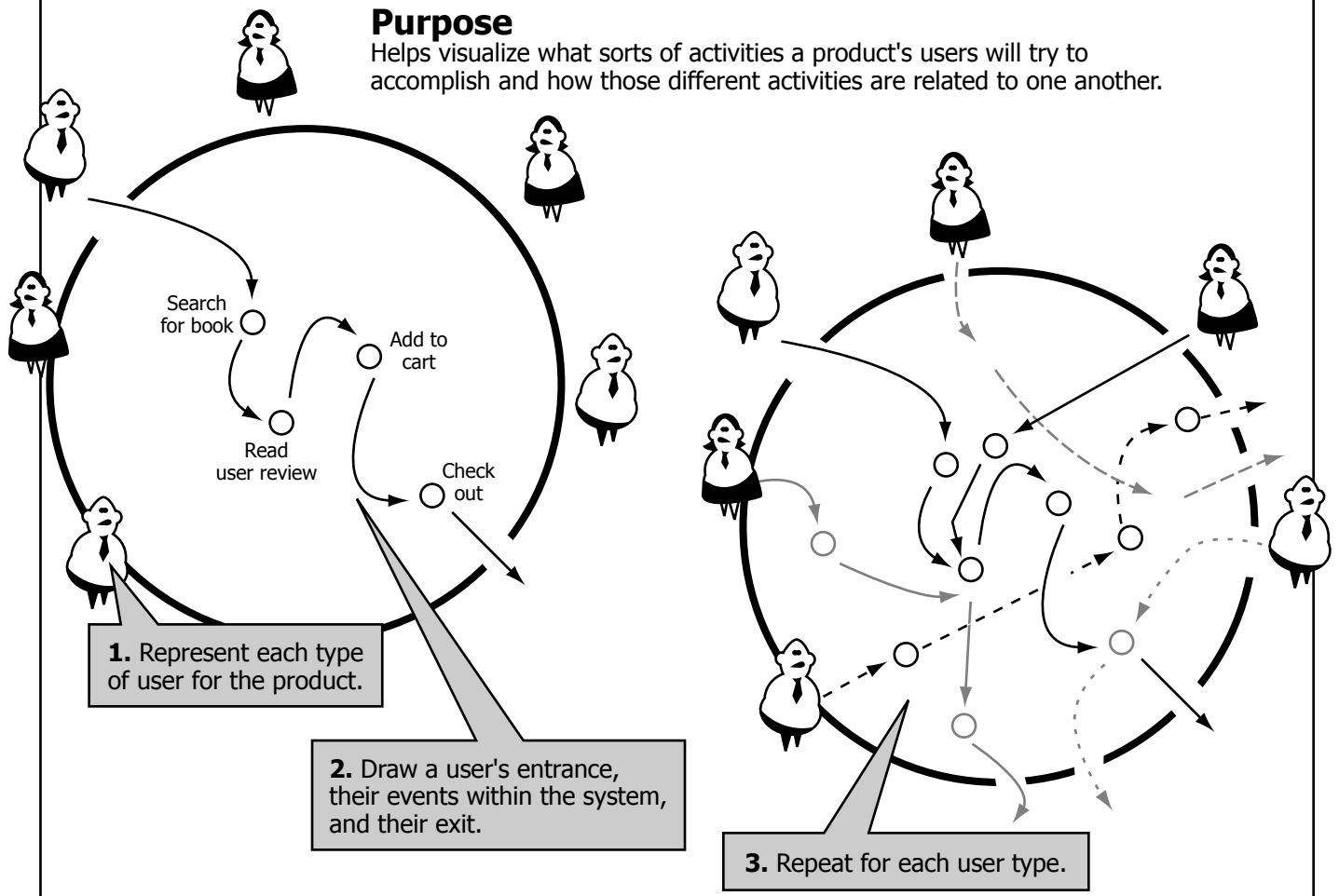
This package first appeared in Boxes and Arrows: the online IA journal <http://www.boxesandarrows.com>

Copyright 2003 by Dan Willis, [dan@dswillis.com](mailto:dan@dswillis.com) <http://www.dswillis.com/tools>

# Sitepath Diagramming

## Purpose

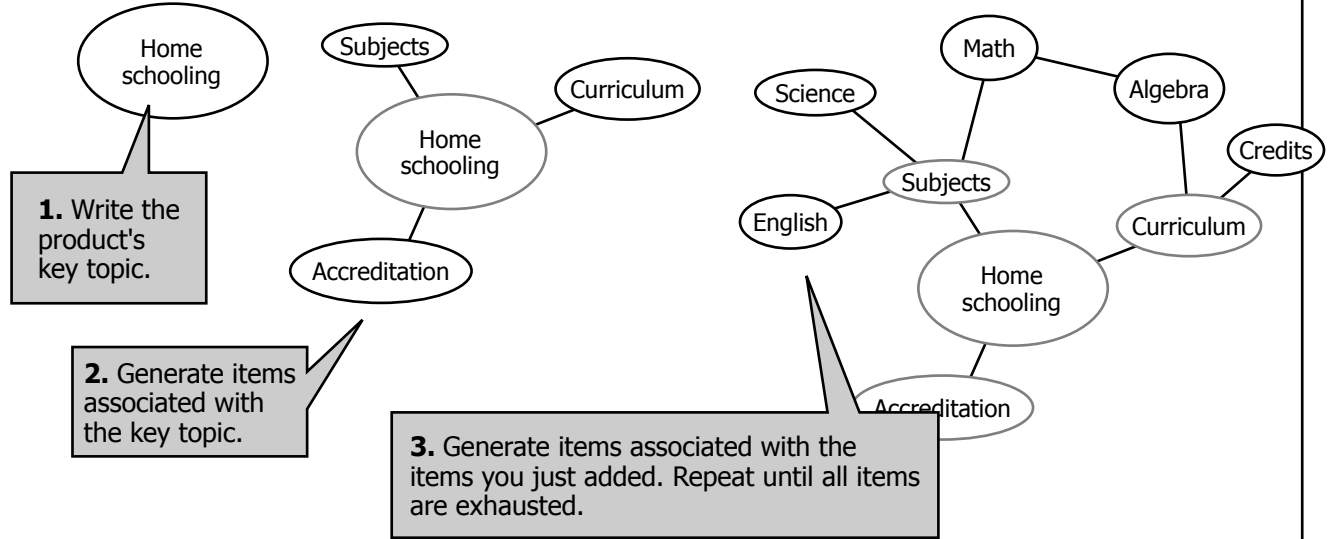
Helps visualize what sorts of activities a product's users will try to accomplish and how those different activities are related to one another.



# Topic Mapping

## Purpose

A brainstorming tool used to generate a structure for a product's information.



# Free Listing

## Purpose

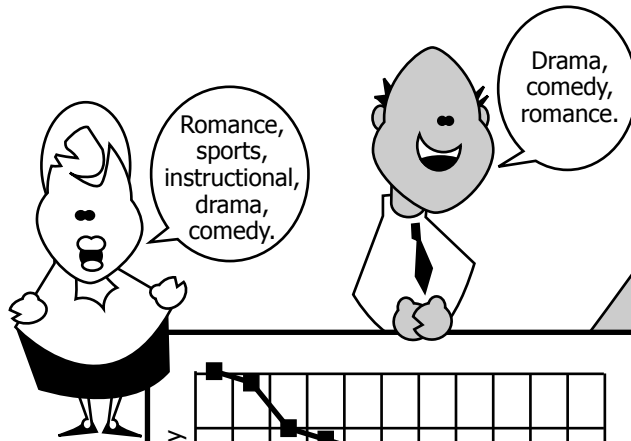
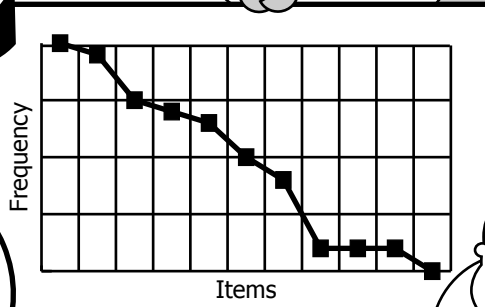
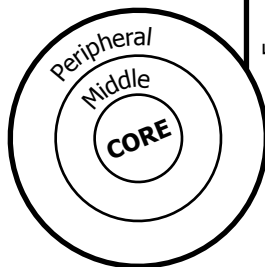
To understand the scope and contents of a domain.

## Collecting

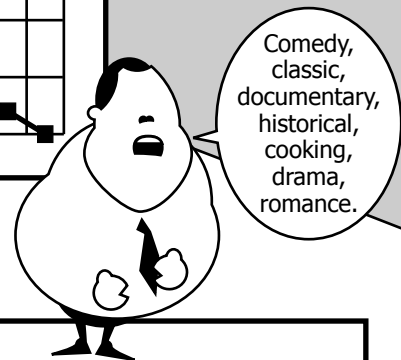
In this example, 20 people are asked to name kinds of videos. (The more agreement within a particular domain, the fewer respondents are needed.)

## Crunching

Charting the average number of times each item was listed by the respondents helps understand the core, middle, and peripheral items within the domain.



**SOURCE:**  
 "Beyond Card-sorting" by  
 Rashmi Sinha  
 ([http://www.bboxes-andarrows.com/archives/beyond\\_cardsorting\\_freelisting\\_methods\\_to\\_explore\\_user\\_categorizations.php](http://www.bboxes-andarrows.com/archives/beyond_cardsorting_freelisting_methods_to_explore_user_categorizations.php))  
 and her presentation at the AIfIA Leadership Seminar, March 21, 2003.



## Comparing

A **co-occurrence matrix** charts how many times pairs of items both appeared on respondents lists. This data can be used for **multidimensional scaling**.

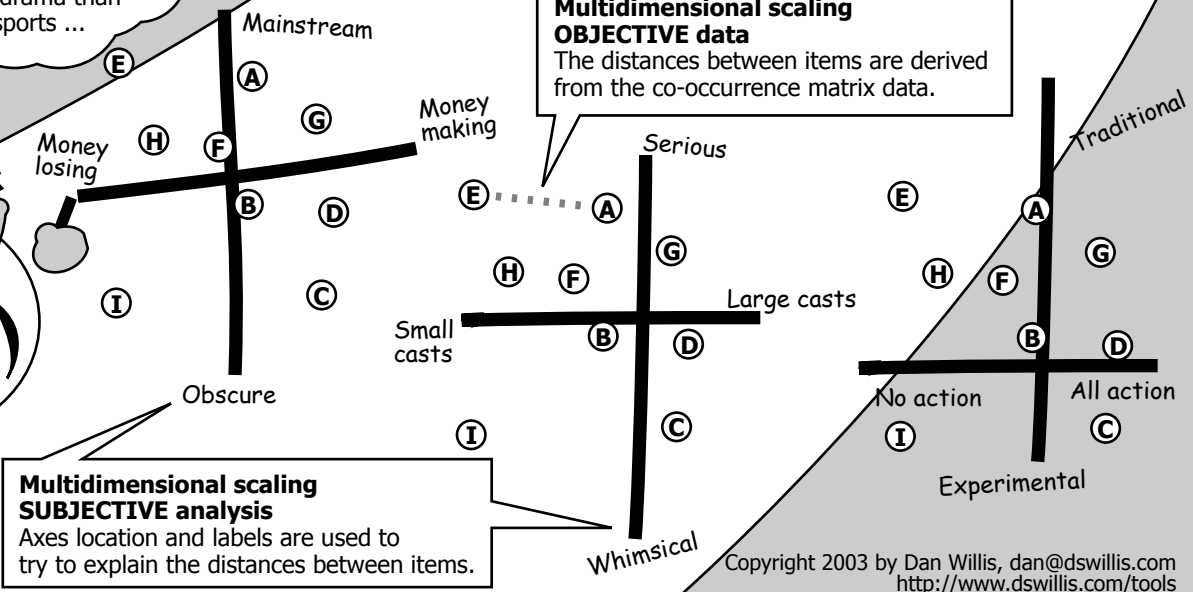
Co-occurrence matrix

	Classics	Comedy	Cook	Doc.	Drama	Hist.	Instr.	Roman	Sports
Classics	20	15	3	11	11	4	1	20	8
Comedy	15	20	4	6	20	3	2	12	17
Cooking	3	4	20	20	0	8	2	4	11
Documentary	11	6	20	20	16	0	3	12	3
Drama	11	20	0	16	20	19	12	0	5
Historical	4	3	8	0	19	20	0	14	2
Instructional	1	2	2	3	12	0	20	2	9
Romance	20	12	4	12	0	14	2	20	5
Sports	8	17	11	3	5	2	9	5	20

3 respondents listed both "Cooking" and "Classics."

Hmm, the data says there's something about comedy that is more like drama than sports ...

**Multidimensional scaling OBJECTIVE data**  
 The distances between items are derived from the co-occurrence matrix data.



**Multidimensional scaling SUBJECTIVE analysis**  
 Axes location and labels are used to try to explain the distances between items.

# Card Sorting

## Purpose

To understand how users group information within a particular domain. This can help create or revise a product's hierarchical organization.

## Method

Test participants organize cards representing specific types of information.

## Open sort

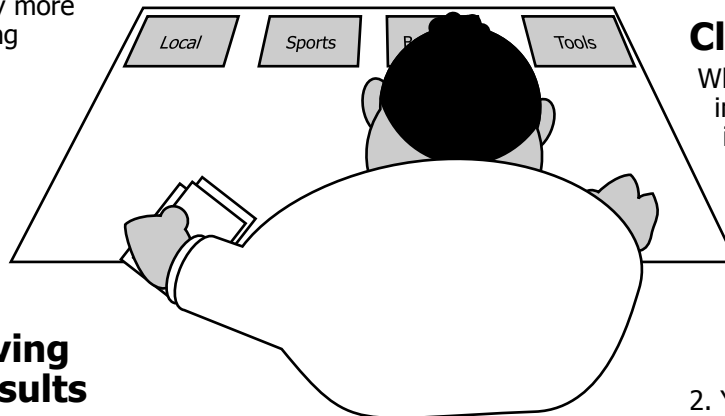
When launching a new product or if a complete reorganization of an existing product is possible, test participants can label their own categories for the sorted information.

### To avoid test participants giving a new category for every item\*:

Suggest a range for the final number of categories (four to eight, for example).

### OR

Allow successive card sorts where test participants can collapse categories into progressively more encompassing categories.



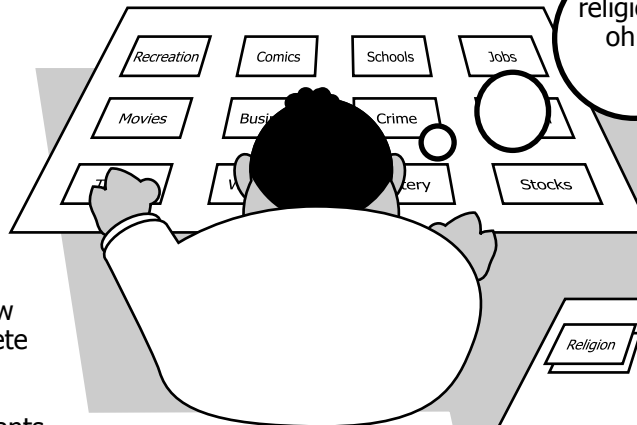
## Resolving the results

From "Information Architecture: Blueprints for the Web" by Christina Wodtke:

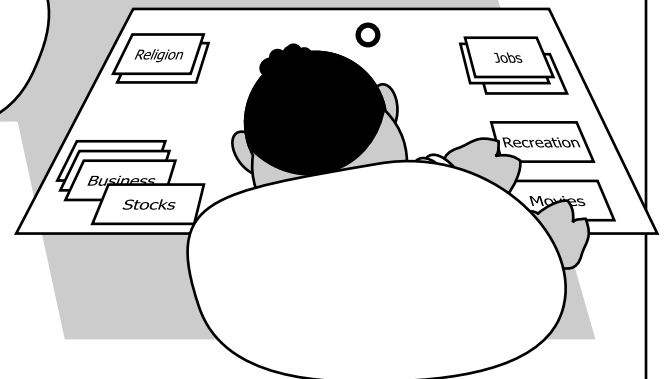
**1. Look for the dominant organization scheme among all results.** Typically, one will emerge.

**2. Adjust scheme to make kinds of categories consistent.** For example, Breakfast - Appetizers - Italian - Main Course - Side Dishes - Tofu - Drinks - Dessert can be condensed into Appetizer - Main Course - Dessert ... without losing the spirit of the test results.

**3. Set aside the odd categories that don't match.** Look for odd categories created by more than one person. Sometimes they suggest criteria for how people are looking for information and can be addressed with solutions outside of the overall organizing scheme.



Let's see ... stocks and business belong together ... hmm religion and crime together? oh my ... uhhhh comics hmm ...



\*From Rashmi Sinha's presentation at the AIFIA Leadership Seminar, March 21, 2003.

## Closed sort

When reorganizing or making improvements to an existing information architecture, test participants are asked to organize cards under existing categories.

### Variations\*:

1. You should consider NOT allowing a miscellaneous category.
2. You should consider allowing participants to put the same item under more than one category.

# Personas

## Purpose

By creating archetypes that represent the users of a product, products can be more user-centric.

## Using personas

Personas have value in every phase of product development:

### 1. Defining the problem

Personas focus on specific user characteristics, this creates a hierarchy, and hierarchy forces tough (but essential) decisions.

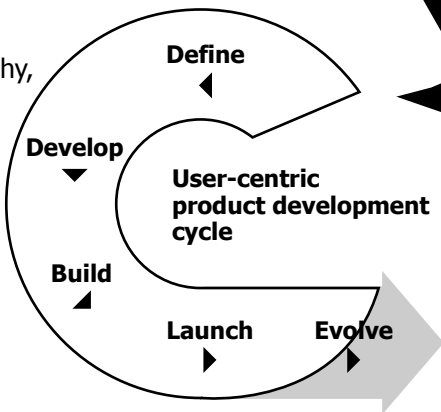
### 2. Developing the solution

Solution can be tested against personas.

### 3. Building the solution and

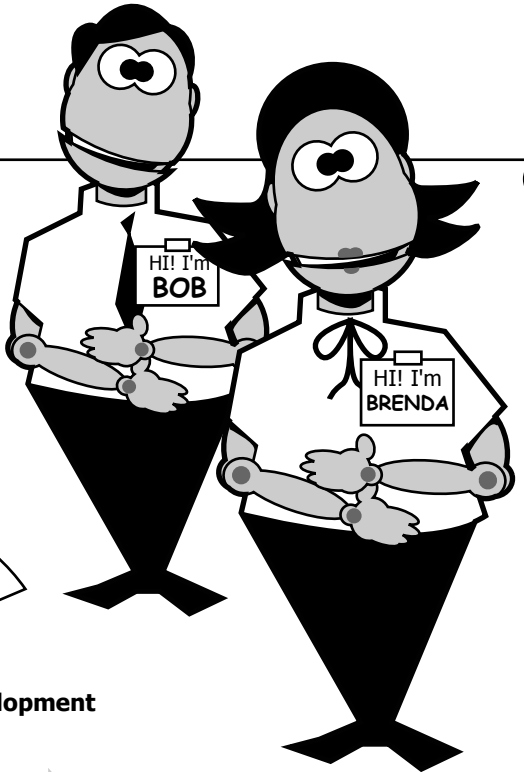
### 4. Launching the product

Personas maintain cross-departmental cohesion.



### 5. Evolving the product

Regular testing of product against personas can expose need for change and growth.



## Developing personas

### According to Cooper<sup>1</sup>

The folks at consulting firm Cooper develop personas by interviewing the current users and/or potential users of the product. They then distill characteristics learned in the interviews to represent distinct sets of user behavior patterns and goals.

### According to Razorfish<sup>2</sup>

Much to the chagrin of Alan Cooper, some folks want to use a more quantitative approach to developing personas. (Cooper argues that demographics shed light on the sales process, not the development process.) In the redesign of the Ford Motor Co. website, consulting firm Razorfish used statistical data about Ford customers to guide who they would interview and how the distilled characteristics would be organized.

### Failing either of those approaches, Plan C

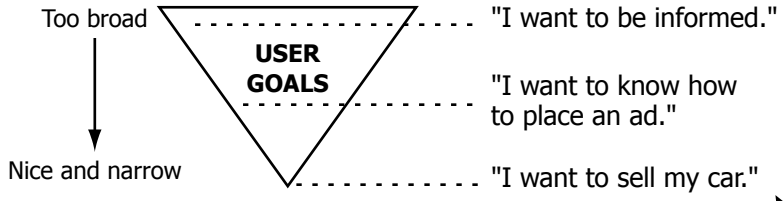
When I led a development of personas as Director of Site Development at washingtonpost.com, I didn't have the buy-in I needed in order to talk to our users. The use of personas and IA tools in general were treated like voodoo by some key mid- and senior-level managers. To stay under the corporate radar, I used an alternative approach to developing personas for a project to overhaul our Customer Care services.

If the Web is about a single user and the information they choose to experience, then the user goal is the Web's dominant, core component. So we used user goals to create our personas:

### Step 1: Brainstorming user goals

Picture an upside-down triangle (basically, an arrow pointing down). User goals that are too broad occur at the widest area of the triangle and are difficult to address in any real way with product development.

I led a brainstorm by a cross-departmental team to generate user goals that could be satisfied by ideal washingtonpost.com Customer Care services.



<sup>1</sup> "The Inmates are Running the Asylum" by Alan Cooper, chapters 9 and 10.  
<sup>2</sup> "Using Personas and Scenarios to Guide the Ford.Com Site Redesign," presented by Dai Pham, Razorfish, Inc. at the IA Summit "Making Connections," March 2003.



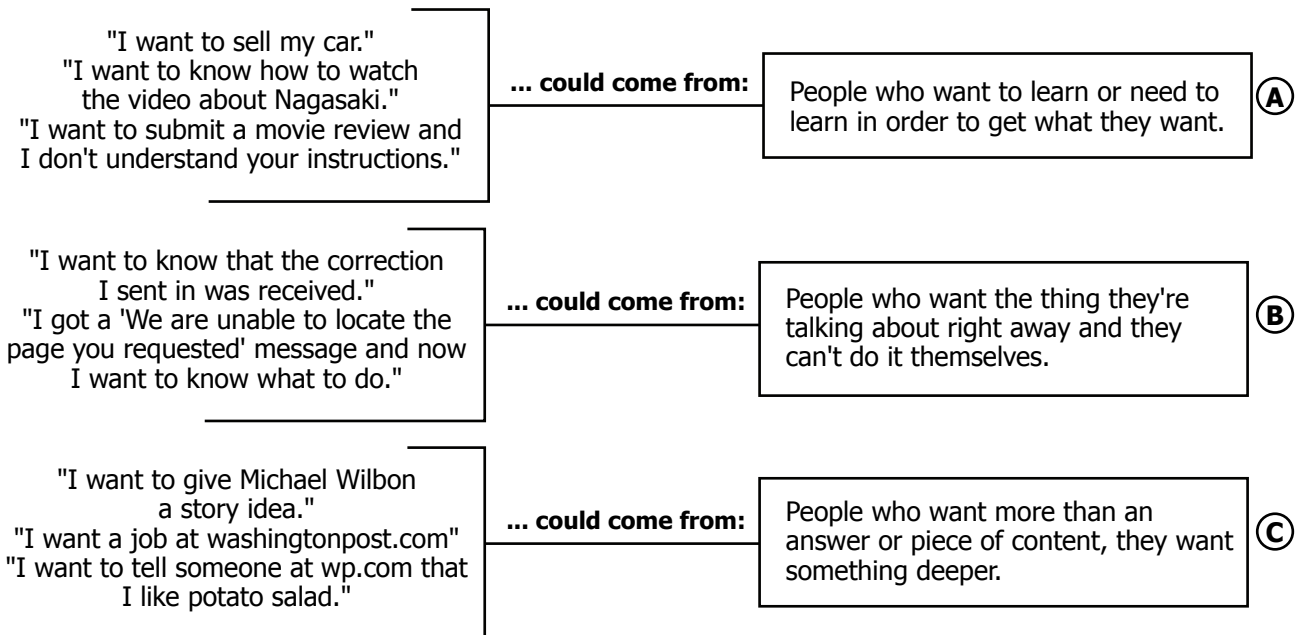
## Personas (continued)

Goals that were too broad were distilled to be as specific as possible:



### Step 2: Cluster user goals

We played around with different combinations of user goals until archetypes emerged:



### Step 3: Create personas

- |  |   |  |
|--|---|--|
| <b>(A) Chester Gunn</b><br>19 yr. old college student. Smart, but lazy. He only puts effort into things that interest him. | <b>(B) David Palmiotti</b><br>43 yr. old father of one. Remarried. Impatient and used to being taken care of. | <b>(C) Taiye Uwawah</b><br>57 yr. old widow and retired librarian. |
|--|---|--|

## Primary personas

There still seems to be some variation in the definition of the primary persona:

**Alan Cooper:**<sup>1</sup> "To be primary, a persona is someone who must be satisfied, but who cannot be satisfied with an interface designed for any other persona." Cooper used a primary persona in his book that represented a tiny percentage of his client's business, but who was the perfect key to his client's product puzzle.

**Christina Wodtke:**<sup>2</sup> "Your primary persona needs to be a common user type who is both important to the business success of the product and needy from a design point of view – in other words, a beginner user or a technologically challenged one."

**My experience:** The idea of a single primary persona completely freaked out some of the washingtonpost.com managers I dealt with. "But we want to be great for aaaaaaaall of our users!!!" they objected. I was never able to get them to support personas, or put resources toward the satisfaction of specific user types if it was at the expense of others. As a result, all of our users ended up less satisfied.

<sup>1</sup> "The Inmates are Running the Asylum" by Alan Cooper, pg. 137.

<sup>2</sup> "Information Architecture: Blueprints for the Web," by Christina Wodtke, pg. 171.