Card Sort Topic Selection Agenda

Goal

Define goals, establish and vet topics, and identify participant segments for the our card sort exercise.

Outcomes

- Well-defined test goals
- A set of tested card sort concepts that emerge from defined goals and existing research and discovery inputs
- A formulation of participant requirements that can be used to drive recruiting and study timeline moving forward

Agenda

1. **Identify and prioritize card sort study goals**
   Goal: Make sure we know what you want to accomplish before you start collecting concepts.

   - What do we want to learn as a result of this study?
   - Which of these goals are most important to the success of subsequent work?

2. **Collect concepts**
   Goal: Get all the possible concepts that might help inform our study goals out on the (virtual) table.

   - Brainstorm and record in a shared spreadsheet possible sort *concepts* that should be included to generate the insight needed to meet the goals we've identified.
   - Sources:
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3. **Groom selected concepts**
   Goal: Narrow our list of possible topics down to the 30 - 60 right topics for our study goals.

   - Reduce the set generated in step 2 to 30 to 50 cards
   - Concepts should correspond to prioritized study goals
   - Concepts should be at a similar level of granularity—think "same generation," not a mix of parent and child level concepts
   - Concept need to be "groupable"—make sure everything *could* be paired with something

4. Refine Labels
    Goal: Eliminate patterns in labels that will tempt participants to group cards based on similar words, regardless of the concepts they represent.

    ● Reword cards for lexical variety
    ● Reword cards to avoid parallel structures and repeated patterns
    ● Don't worry about usability; this is not how concepts will be represented in the final design

5. Test and validate candidate cards
    Goal: Verify that our final cards can be grouped and that they respond to the goals of our study.

    ● During testing: note cards that were difficult to sort or seemed to have no place
    ● After testing, compare results. Are differences between sorts:
        ○ a misunderstanding/different understanding of the concept the card represents?
        ○ a difference in how correctly understood concepts could be sorted?
    ● Revise cards that either a) cannot be paired, or b) do not communicate their concept clearly
    ● Time allowing: re-test and re-evaluate

6. Participant requirements
    Goals: Identify characteristics of our ideal participant pool, based on prioritized study goals

    ● Aim for 30 - 50 participants per distinct segment
    ● Identify compensation/recruiting strategy (better compensation generally leads to higher rates of test completion)
    ● Identify any moderated sort requirements and establish strategy (in-person or remote)
    ● Identify any screening, segmentation/demographic, and post-test questions