

Essential Participatory Tools

For building better brands and websites

Here's a packet of exercises that will help you involve staff, constituents, and other stakeholders in the design of your brand and website. Each exercise includes a little recipe for doing it yourself. If you do them all, they should be done in order. These exercises are meant to be printed out and written on with pens or pencils, don't try to do them on a screen.

Personas 1 hr

The goal of this exercise is to build empathy for who you're serving and what motivates them to interact with your organization and communications. Use the template on the next page to create 2-4 fictional characters (personas) that represent the primary constituencies or audiences for your organization's communications and resources. Do this work as a group, brainstorming responses to areas on the template. You can draw inspiration from real people you know, but try not to get fixated on one particular person.

Unlike the more traditional tool of "target audiences," these fictional characters have names, ages, cultural and class backgrounds, primary languages, likes, dislikes, etc. I encourage you to do some image searching (or sketching) and tape a portrait of each person in the upper right corner.

What's so powerful about personas is that we can test our assumptions by asking questions like "Would Lisa really use that resource?" or "Do you think José would be more likely to join our list if we had our mission statement in Spanish as well as English on the home page?" or "Would Margaret get freaked out if we use explicit income-level language on our donation page?"

For more on personas, check out www.usability.gov/how-to-and-tools/methods/personas.html

NAME

AGE:

CULTURAL BACKGROUND:

CLASS BACKGROUND:

PRIMARY LANGUAGE:

PRIMARY WAY I ACCESS THE INTERNET:

PHOTO

I like...

Values, catch phrases, shows, websites, books, etc.

- 1.
- 2.
- 3.
- 4.
- 5.

I dislike...

Values, catch phrases, shows, websites, books, etc..

- 1.
- 2.
- 3.
- 4.
- 5.

I'm interacting with your org/website because I want to...

- 1.
- 2.
- 3.

Brand Attributes, Round One 10 min

The goal of this exercise is to discover and prioritize important qualities of your organization and explore them visually. Each team member should have their own sheet. Answers will be combined in the next part.

1. Consider the following questions.
2. Take 5 minutes for each question to brainstorm the responses that come to mind and write them down in the columns below.

After interacting with my organization, I want a person to feel _____?

When I think of achieving our goals as an organization, what images or colors come to mind?

Brand Attributes, Round Two 30 min

1. Each team member goes around and briefly shares what they wrote down, and why.
2. Place sheets either on the wall or a table where everybody can see everyone's responses.
3. As a group, take this sheet and work together to put the words and phrases that feel most vital near the dot in the center of the column, and the least vital toward the edges of the column. If you need more space, use a flipchart.

After interacting with our organization, we want a person to feel _____?



When we think of achieving our goals as an organization, what images or colors come to mind?



Website Product Statement 45 min

The goal of this exercise is to force you to succinctly describe who your website is for, why it's valuable to them, and how it's different from those of your peers or competitors. Imagine your website is a product sitting on a store shelf with similar, competing products, and you need to write some box copy that will get a customer to buy it.

For more on product statements, check out: www.joelonsoftware.com/articles/JimHighsmithonProductVisi.html

1. Print out a copy of the following page for each team member, and an extra copy for a combined statement which is the final step of this exercise.
2. Each team member takes 5 minutes to write a Product Statement using the framework provided on the next page. You can deviate from the format a little, but it must include: an audience/constituency, something they want to do, the key benefit, whose website it's different from and why.
3. Each team member goes around and shares their statement by reading it aloud.
4. Take 10-30 minutes as a group to develop a shared statement that captures the best of what each person wrote on a single sheet of paper. It's important to keep the statement brief. You must decide as a group what's most important for each prompt. That said, it doesn't have to be perfect. This is a tool for us, not something outward facing.

FRAMEWORK:

For *(an important constituency)* as well as *(another important constituency)*, who need to *(do something)*, *(organization name)* has a website that *(provides this key benefit)*. Unlike *(primary alternative or peer)*, our website is *(different in this way)*.

EXAMPLE:

For *feminists* who need *strident media criticism*, Bitch Magazine has a website that *lampoons the patriarchy while making you laugh through your nose*. Unlike *Bust Magazine*, the Bitch Magazine website is *chock full of searchable, reader-funded feminist criticism*.

Using the framework above, write your statement below...

Content Card-Sort 45 min

With this exercise, the goal is to organically build a visual outline of your website content, while surfacing different perspectives on what the content should be. First, you'll brainstorm website content and write individual ideas onto index cards or post-it notes. Next, you'll arrange them into logical groups while talking about your rationale with your fellow team members. Finally, you'll label the groups in a way that would make sense to your personas.

SUPPLIES NEEDED:

- Stack of 100-200 standard post-its or 3x5 index cards (I prefer post-its)
- A large empty wall (if you're using post-its), or large table (if you're using index cards)
- Fine-tipped markers (not pens or pencils—something visible from 5-10 feet)

Process

1. Divvy up 50-100 post-its or cards for each team member
2. Take 3-5 minutes for each team member to brainstorm on their own and write down pieces of content they think should be on the website. One piece of content per card or post-it. Be exhaustive and detailed without getting lost in the weeds. "Toolkit on microeconomics" is better than "Resources," but "Chapter on double-entry accounting" is too detailed. Also include important links or actions like "Sign up for email list," "Twitter feed," "Link to Facebook," and "Donate."
3. As people finish writing, they should start putting them on the wall or down on the table.
4. Set a timer for 15 minutes and invite everybody to stand up and look at what other people wrote down.
5. Have everybody physically group cards that make sense together, and narrate while they're doing it. "I'm putting 'history' near 'about us' because that all feels like basic information." "I'm putting my 'contact us' on top of Aaron's because they feel the same to me." Everybody should feel free to rearrange the cards/post-its, and add new ones if they notice something missing. If there are differences, negotiate a resolution.
6. Set a timer for 5 minutes and work as a group to write overarching labels for each of the groups. Revisit your personas and determine if the labels would make sense to them.
7. Document the result by taking a photo of each group, as well as an overview photo capturing all the clusters or groups.

Sketch Key Pages 45 min

With this exercise, the goal is sketch 2-3 key pages to surface different perspectives on what's important for those pages, and develop a shared vision. You'll pick 2-3 groups or clusters from the Content Card-Sort and over 2 rounds converge on a shared understanding of the overall structure of each page. For some good examples of sketches, check out: webdesignledger.com/inspiration/18-great-examples-of-sketched-ui-wireframes-and-mockups

SUPPLIES NEEDED:

- 10-20 sheets of 8.5x11" paper
- Fine-tipped markers (so you don't get too fixated on details)
- Scotch tape (for taping sheets together if necessary)

Process

1. As a group pick 3 key pages from the Card-Sort, including the home page.
2. Start with a key page that isn't the home page
3. Set a timer for 5 minutes, and have each team member sketch a rough layout for the page, including the header, navigation menu, logo, page title, and footer. Draw boxes or sketchy depictions of videos, images, etc. If the page is long, additional sheets can be taped together.
4. Have each team member go around and share their sketch.
5. Set the timer for 3 minutes and do another round on the same page, with each team member incorporating what they liked from other team members.
6. Go around again and share sketches, and put a star on the sketch the group agrees is the best representation of that page.
7. Repeat the same two-round-and-star process for each of the remaining key pages, ending with the home page.
8. Document by taking photos of starred pages, and keeping the stack of round one sketches as a repository of ideas for future use.