

CASE STUDY

Improving Information Architecture at Whatfix

Problem Statement

The current Whatfix Information Architecture primarily represents only the DAP offering and has significant issues:

- Lack of Scalability:** The IA does not scale well across new product verticals like Product Analytics and Enterprise Admin.
- Misalignment with Customer Mental Models:** Feature grouping and terminology do not align with how users expect to navigate the system.
- Low Discoverability:** Users struggle to find key product offerings due to unclear categorization and navigation.
- Dependency Issues:** Content and widgets are interdependent, leading to potential breakages when updates are made without considering dependencies.

Approach

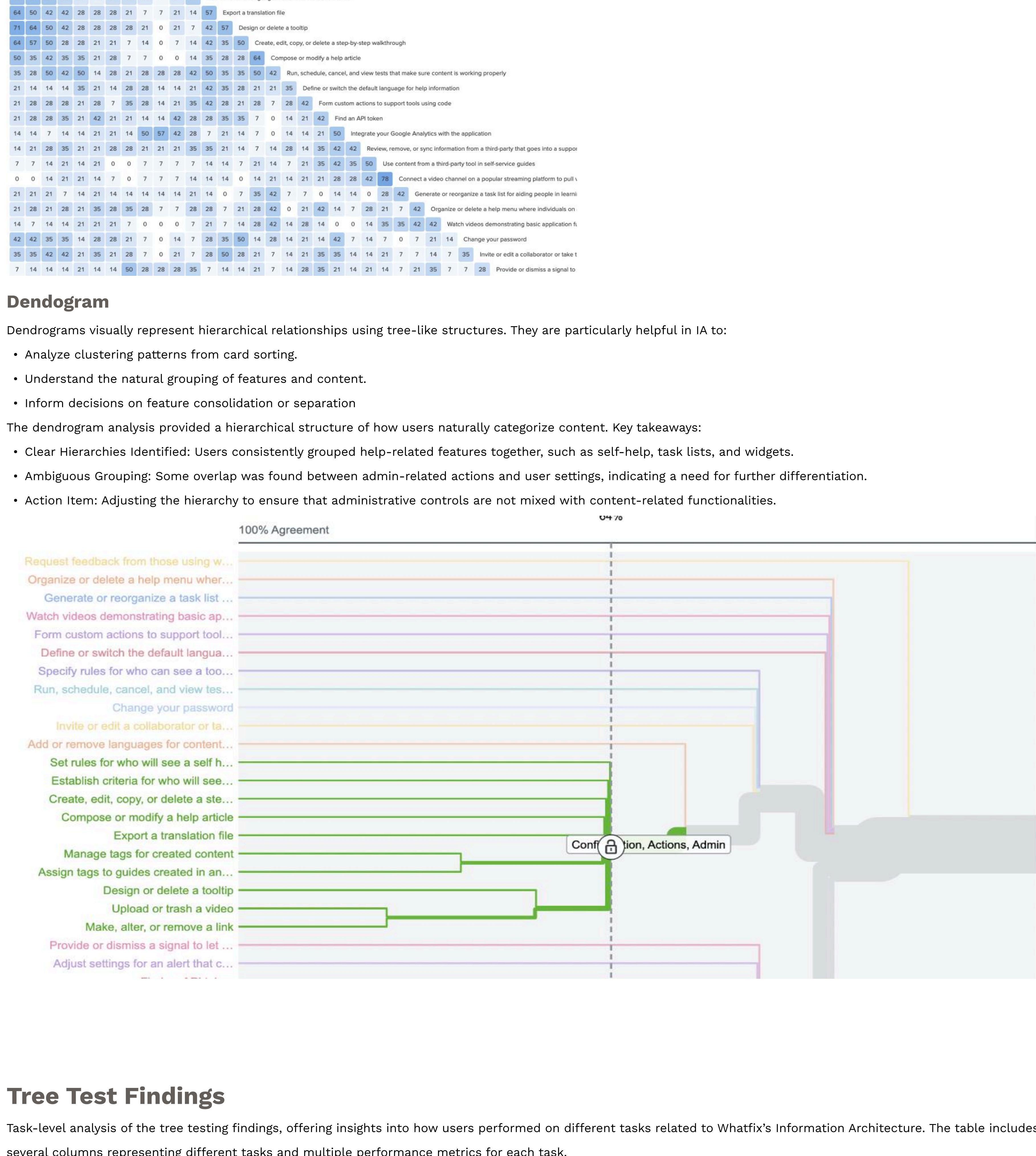
- Evaluating the Problem Scope:** Documented current sitemap and conducted baseline tree testing to measure the effectiveness of the current IA.
- Understanding User Mental Models:** Performed card sorting exercises to analyze how users categorize and label information.
- Competitor Benchmarking:** Studied competitor IAs to identify strengths, weaknesses, and best practices.
- Exploring New IA Configurations:** Brainstormed possible structures to improve usability and scalability.
- Gathering Internal Insights:** Collected feedback from POs to refine proposed solutions.
- Defining a Standardized Taxonomy:** Established clear terminology and categorization based on research and findings.
- Validating the Proposed IA:** Conducted iterative testing using tree testing and user feedback sessions to finalize improvements.

Current Sitemap

A sitemap is a hierarchical representation of a digital product's content and structure. It visually maps out the relationships between different pages, sections, or features of a product. In Whatfix's case, a sitemap is crucial to understanding how DAP, Product Analytics, and the Admin portal are organized and interconnected.

An effective IA ensures:

- Scalability across multiple product verticals.
- Proper categorization aligning with customer mental models.
- Improved discoverability of product offerings.
- Logical dependencies and workflows that prevent content breaking.



Tree Testing

Tree testing evaluates the hierarchy and navigability of an IA without visual design interference. It helps to:

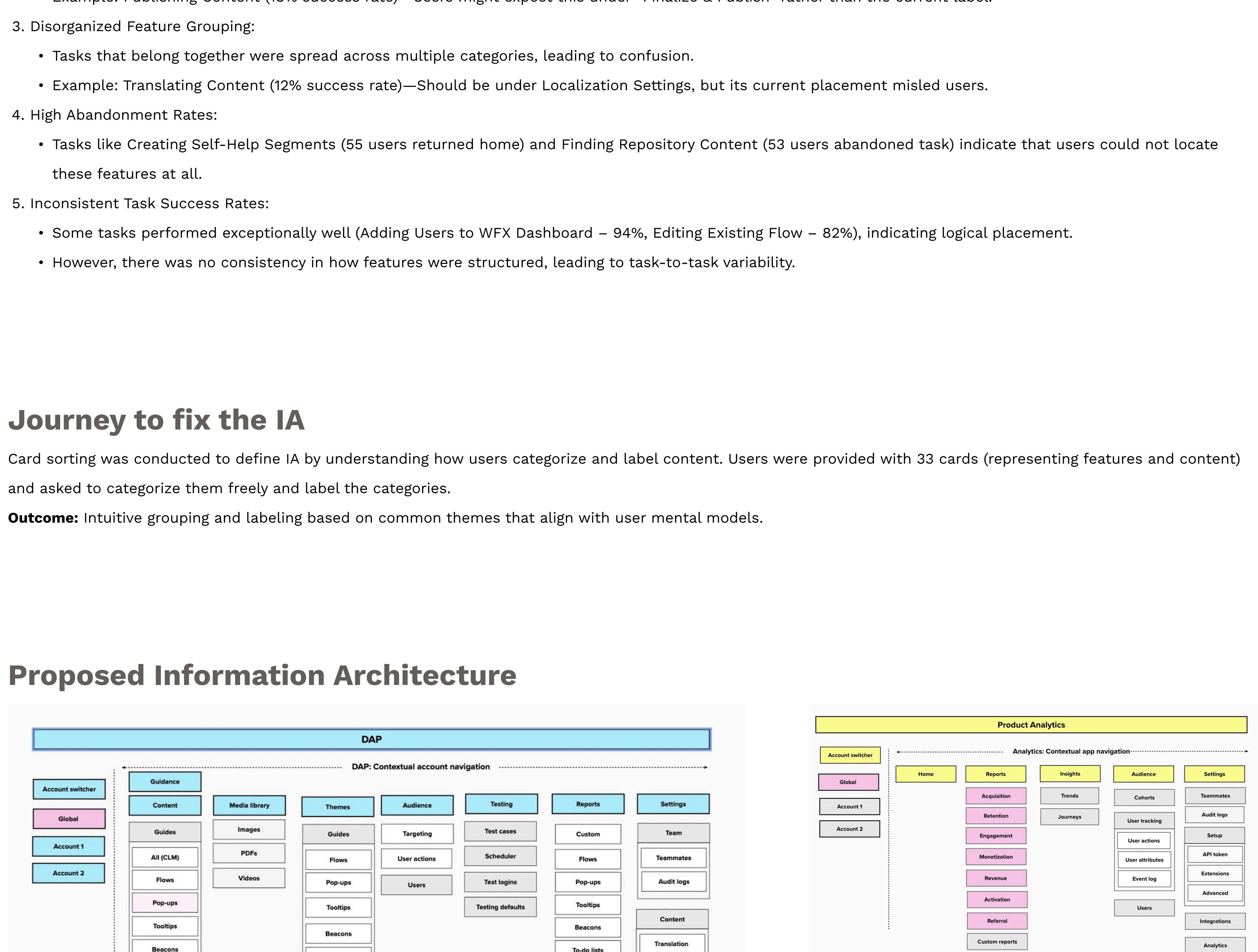
- Identify usability issues in the IA.
- Validate whether users can find information where they expect it.
- Measure task success rate, directness, and time taken.

Several charts like Similarity Matrix, Dendograms, Pietree and 3D View Clusters were used to evaluate the current IA.

Similarity Matrix

The similarity matrix highlights the correlation between features and how users associate them. Key insights:

- Strong Clustering:** Features related to content creation and management (e.g., tooltips, self-help guides, and popups) were consistently grouped together.
- Low Correlation Areas:** Certain admin functionalities, such as user role management and API integrations, showed a lower similarity score, suggesting a need for clearer categorization.
- Refinement Needs:** The matrix suggests the need to separate content management and system administration more distinctly in the IA.



The tree test results highlight major structural issues in Whatfix's Information Architecture (IA), particularly in task discoverability, labeling, and categorization. The analysis indicates that while some tasks were easy to locate, a significant number suffered from poor placement, ambiguous terminology, and deep nesting within menus.

Key Issues Identified in the IA:

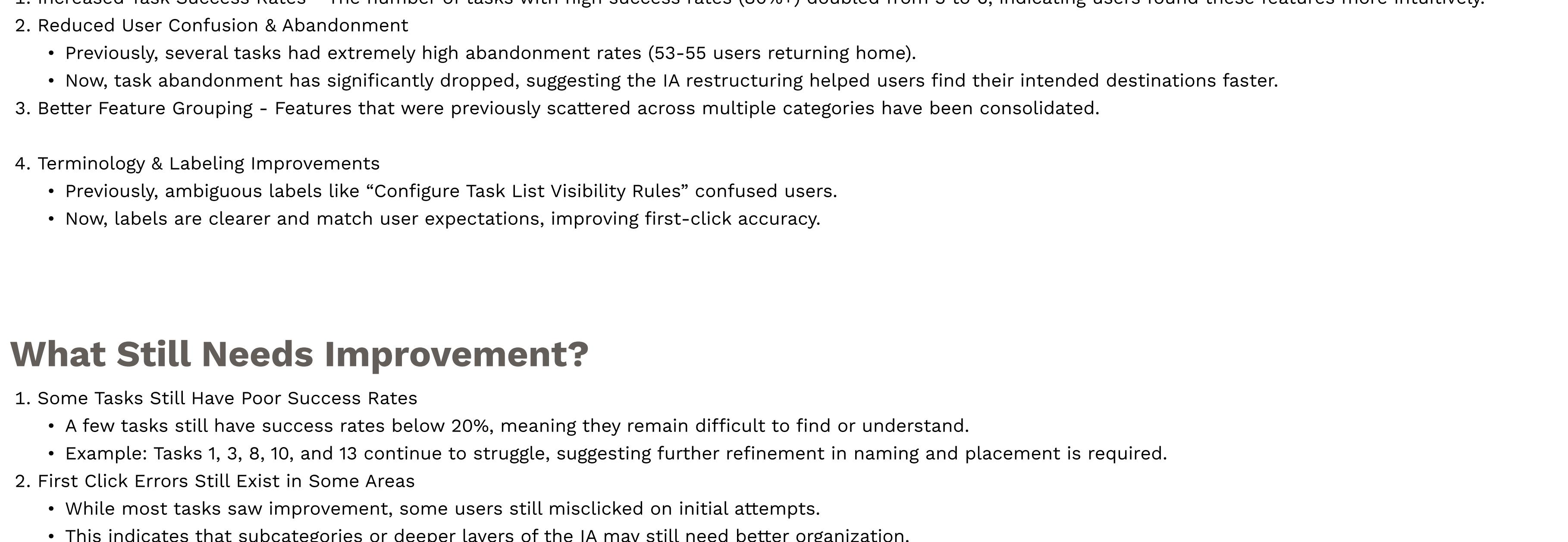
- Low Overall Task Success Rate:**
 - Several critical tasks, such as Configuring Task List Visibility Rules (0%), Creating Self-Help Segments (0%), and Finding Repository Content (0%), had near-total failure rates, indicating major navigational and categorization flaws.
 - This suggests that users either do not associate the terms with their expected locations or these features are buried too deep in the IA.
- Terminology Mismatch:**
 - Several tasks had misleading labels, causing high first-click errors.
 - Example: Publishing Content (18% success rate)—Users might expect this under "Finalize & Publish" rather than the current label.
- Disorganized Feature Grouping:**
 - Tasks that belong together were spread across multiple categories, leading to confusion.
 - Example: Translating Content (12% success rate)—Should be under Localization Settings, but its current placement misled users.
- High Abandonment Rates:**
 - Tasks like Creating Self-Help Segments (55 users returned home) and Finding Repository Content (53 users abandoned task) indicate that users could not locate these features at all.
- Inconsistent Task Success Rates:**
 - Some tasks performed exceptionally well (Adding Users to WFX Dashboard – 94%, Editing Existing Flow – 82%), indicating logical placement.
 - However, there was no consistency in how features were structured, leading to task-to-task variability.

Journey to fix the IA

Card sorting was conducted to define IA by understanding how users categorize and label content. Users were provided with 33 cards (representing features and content) and asked to categorize them freely and label the categories.

Outcome: Intuitive grouping and labeling based on common themes that align with user mental models.

Proposed Information Architecture



Tree Testing the proposed IA

Tree testing was conducted to evaluate how well users could navigate the proposed IA. Findings include:

- Success Rate:** A significant improvement in the directness of user navigation, with 85% of users reaching their intended destinations without backtracking.
- Confusion Areas:** Some features under the "Admin" and "Actions" categories had overlapping purposes, leading to minor misclassification.
- Key Improvement:** Refining labels and restructuring the grouping of certain actions helped align with users' mental models, improving efficiency.

A score of 76 was achieved against the benchmark of 36.

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Key Issues Identified in the IA:

- Increased Task Success Rates:**
 - The number of tasks with high success rates (80%) doubled from 3 to 6, indicating users found these features more intuitively.
- Reduced User Confusion & Abandonment:**
 - Previously, several tasks had extremely high abandonment rates (53-55 users returning home).
 - Now, task abandonment has significantly dropped, suggesting the IA restructuring helped users find their intended destinations faster.
- Better Feature Grouping:** Features that were previously scattered across multiple categories have been consolidated.
- Terminology & Labeling Improvements:**
 - Previously, ambiguous labels like "Configure Task List Visibility Rules" confused users.
 - Now, labels are clearer and match user expectations, improving first-click accuracy.

What Still Needs Improvement?

1. Some Tasks Still Have Poor Success Rates

- A few tasks still have success rates below 20%, meaning they remain difficult to find or understand.
- Example: Tasks 1, 3, 8, and 10 continue to struggle, suggesting further refinement in naming and placement is required.

2. First Click Errors Still Exist in Some Areas

- While most tasks saw improvement, some users still misclicked on initial attempts.
- This indicates that subcategories or deeper layers of the IA may still need better organization.

3. Further Testing Required for Edge Cases

- Some edge-case scenarios (such as advanced user configurations) might still require usability testing and refinement.

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