REPORT: Sharepoint Closed Card Sort from Q4 2020

Executive Summary

The main goal of this test was to understand how staff would organize important and common parts of the staff intranet when given a specific set of categories. The card sort asked participants to take a list of pages and sort them into defined categories. The study took 8 days to complete. In all 26 staff participated. 40 cards were sorted into various categories.

A majority of the cards (aka pages) were sorted into the correct categories. Only 6 cards were completely wrong and 6 additional cards were confusing to participants. With some minor corrections to these pages and any related pages the information architecture of the website should be in good shape.

The next possible test to run could be a "Tree Test" that would test actual scenarios against a full site tree to see if participants could navigate down the full tree and into the page the would best solve their problem. The tree test is advisable but not necessary.

Report Date	22 Dec 2020
Date / Event of Test	09 Dec 2020
Report Author	@ Nick Mosher
Request	Sharepoint Closed Card Sort 2020-12
Application	Staff Site
Grade (SUS)	n/a
Score (SUM)	n/a
Participants (N)	26

Prepared for:

@ Sara Brunsvold , @ Debra Hopkins , and @ Gretchen Schultz

Questions

Questions or comments about this report and it's findings can be made in the comments section below or to @ Nick Mosher

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Methodology

What Participants Did

1. Sorted 40 cards into groups
2. Identified cards that should belong in multiple categories
3. Identified confusing categories
4. Answered survey questions

What Data We Collected

1. Time to complete task
2. Card groupings and categories
3. Similarities between cards and participants
4. Survey data

Participants

- 26 staff participated in the study
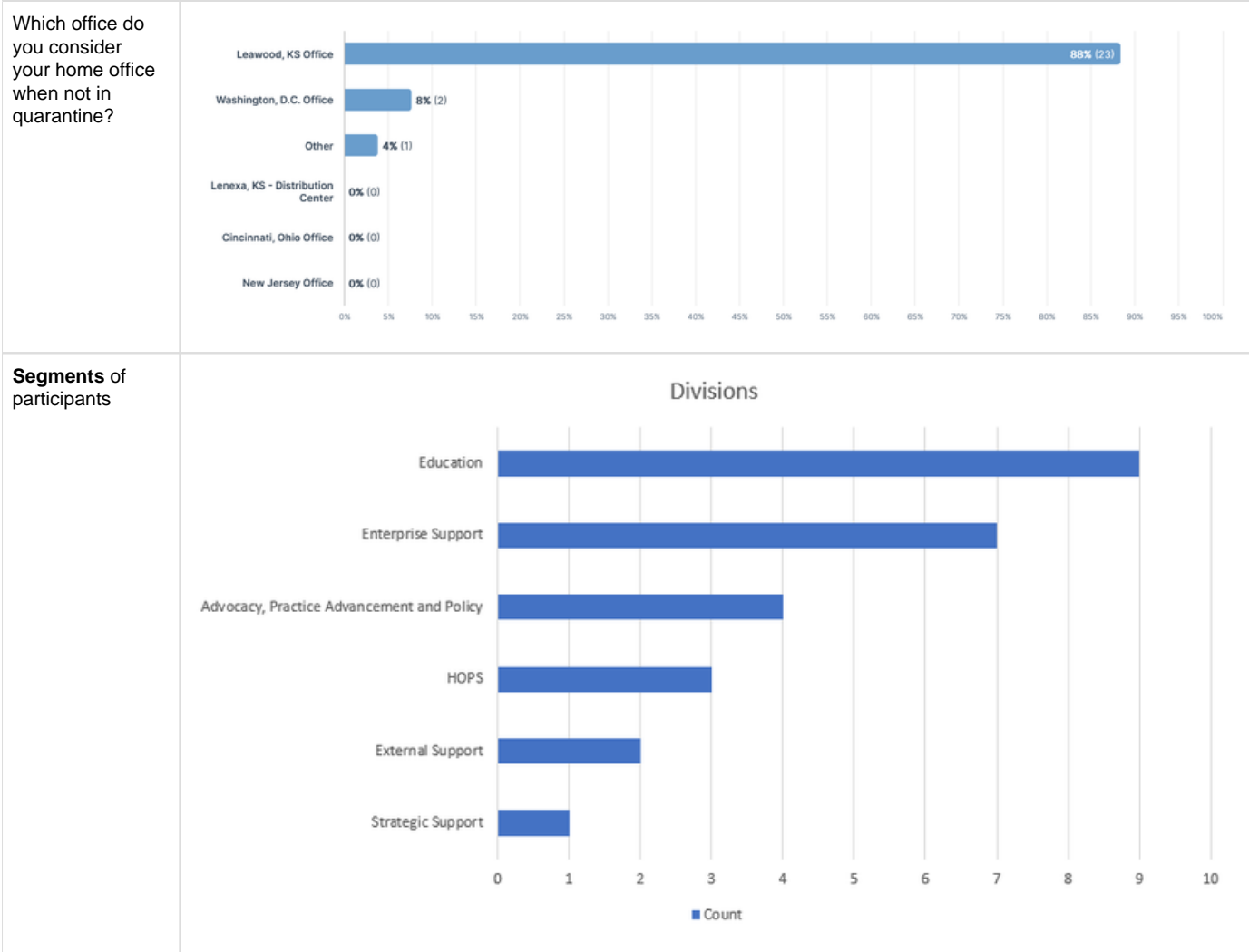- Staff were recruited via individual emails and Pulse+ articles

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Major Findings and Recommendations

Major Issues	Recommended Solutions
- AAFP's Online Presence - File Sharing - Ordering office supplies - Recognition Awards - Recording Time in Workday - Shipping/Mailing	Each of these pages were not placed in the expected categories. Move them to more intuitive categories.

Detailed Findings and Recommendations

Questions and Answers

Question	Summary of Answers

Which office do you consider your home office when not in quarantine?	**Which office do you consider your home office when not in quarantine?** Leawood, KS Office — 88% (23) Washington, D.C. Office — 8% (2) Other — 4% (1) Lenexa, KS - Distribution Center — 0% (0) Cincinnati, Ohio Office — 0% (0) New Jersey Office — 0% (0)
Segments of participants	**Divisions** Education — 9 Enterprise Support — 7 Advocacy, Practice Advancement and Policy — 4 HOPS — 3 External Support — 2 Strategic Support — 1 ■ Count

Results Compared to Information Architecture

The following list (representing the combined participants) compares where each participant sorted each card against where it was intended to live. Green cards have a very high correlation. Yellow cards are at risk of being confusing if they are left as they are. Red cards are problematic and should be re-evaluated. Additionally in the download, the final column shows which cards participants thought would need multiple categories.

PROBLEMATIC

1. AAFP's Online Presence
2. File Sharing
3. Ordering office supplies
4. Recognition Awards
5. Recording Time in Workday
6. Shipping/Mailing

RISKY

1. AAFP Brand
2. About the AAFP Library
3. Data Assets
4. Making hotel reservations
5. On-Site Wellness
6. Signing up for Emergency Alert System

GOOD

- ACT Team
- Alliance for eHealth Innovation

- Balanced Budget Policy
- Board provisional policy
- Cell Phones
- Classes of Protected Veterans
- Deliveries
- Disability insurance
- EMT Meeting Notes
- Evacuation routes
- Explanation of compensation philosophy
- Financial Planning and Educational Resources
- Flea Market
- Health of the Public and Science
- HelpLine
- Hotel and Meal Caps
- Installing a Printer
- IT Support for Everyday Tasks
- Manager Resources
- Notary Services
- Paycheck Procedures
- Paying for teambuildings, recognitions and meals
- Sabbaticals
- Salary Structure
- Telephone use
- Toastmasters
- Training
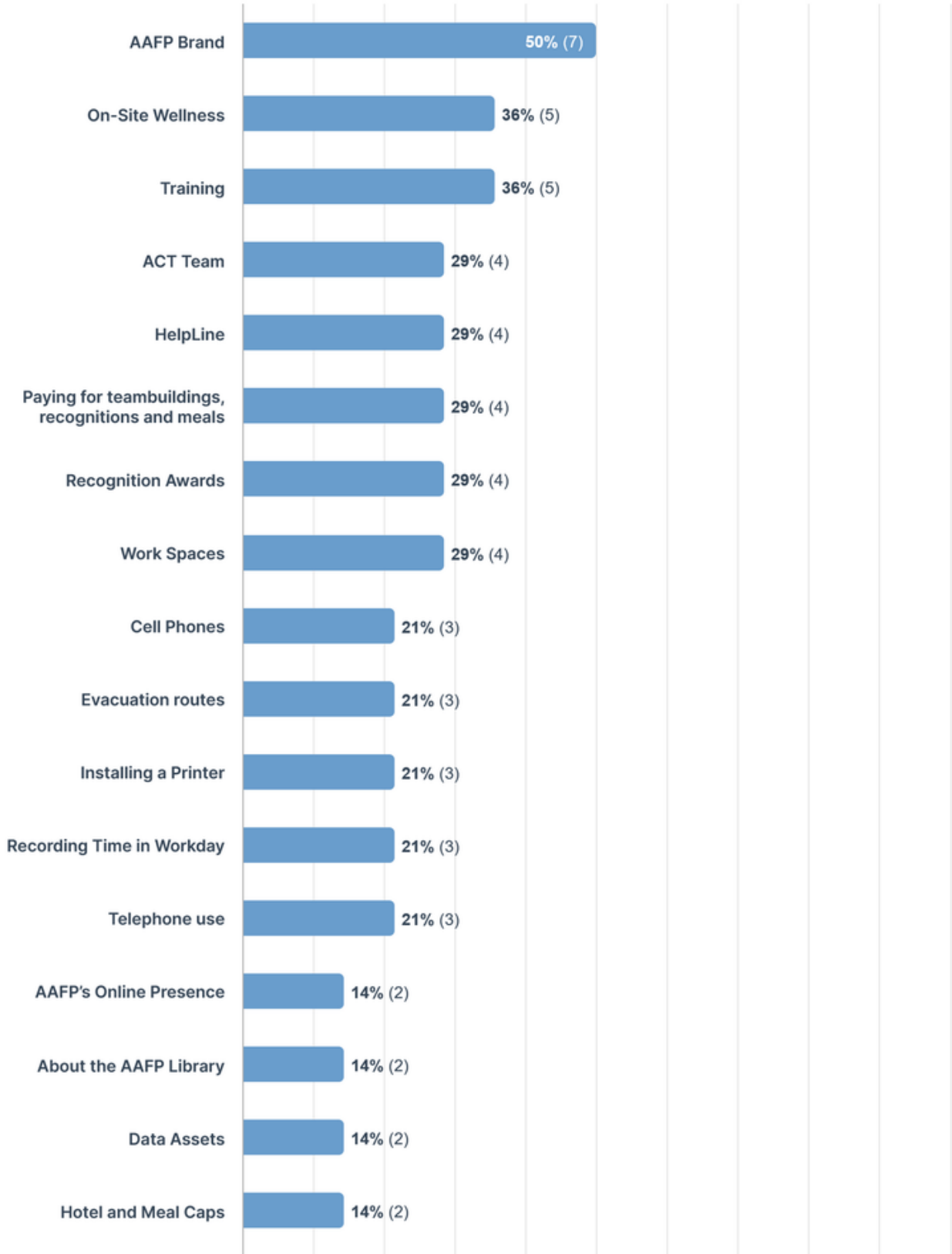- Work Spaces
- Working with Vendors

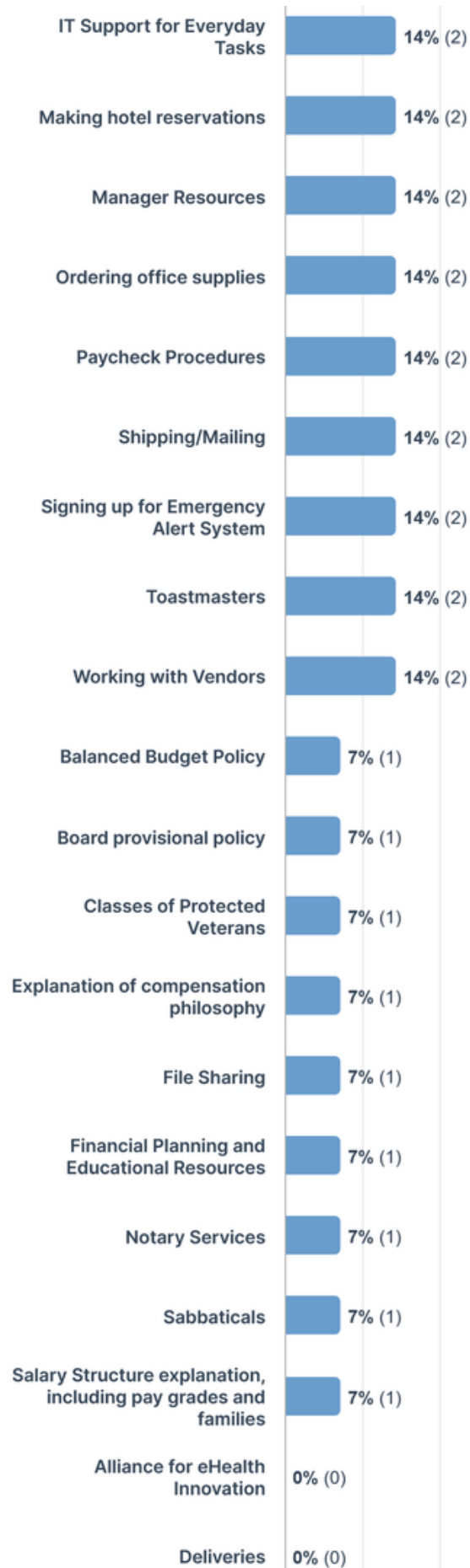Download the Excel Table: Results-Comparison-to-IA-2020-12-17.xlsx
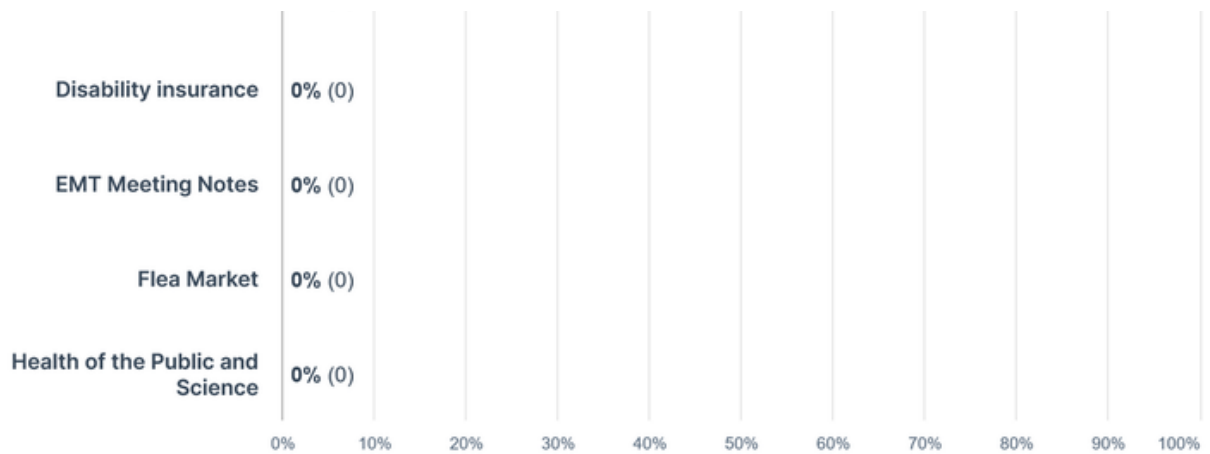
Multiple Categories

Almost half of participants skipped this question. Since there was no "None, of the above" we have to assume that they don't see the need to place any of these into multiple categories.

1. Do any of these items belong in multiple categories?

14 responses · 14 comments · 12 skipped

Category	Percentage
AAFP Brand	50% (7)
On-Site Wellness	36% (5)
Training	36% (5)
ACT Team	29% (4)
HelpLine	29% (4)
Paying for teambuildings, recognitions and meals	29% (4)
Recognition Awards	29% (4)
Work Spaces	29% (4)
Cell Phones	21% (3)
Evacuation routes	21% (3)
Installing a Printer	21% (3)
Recording Time in Workday	21% (3)
Telephone use	21% (3)
AAFP's Online Presence	14% (2)
About the AAFP Library	14% (2)
Data Assets	14% (2)
Hotel and Meal Caps	14% (2)

Category	Percent
IT Support for Everyday Tasks	14% (2)
Making hotel reservations	14% (2)
Manager Resources	14% (2)
Ordering office supplies	14% (2)
Paycheck Procedures	14% (2)
Shipping/Mailing	14% (2)
Signing up for Emergency Alert System	14% (2)
Toastmasters	14% (2)
Working with Vendors	14% (2)
Balanced Budget Policy	7% (1)
Board provisional policy	7% (1)
Classes of Protected Veterans	7% (1)
Explanation of compensation philosophy	7% (1)
File Sharing	7% (1)
Financial Planning and Educational Resources	7% (1)
Notary Services	7% (1)
Sabbaticals	7% (1)
Salary Structure explanation, including pay grades and families	7% (1)
Alliance for eHealth Innovation	0% (0)
Deliveries	0% (0)

Disability insurance	0% (0)	
EMT Meeting Notes	0% (0)	
Flea Market	0% (0)	
Health of the Public and Science	0% (0)	

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Suggested Pairing for Multiple Categories

14 participants suggested categories that each of the above cards could be sorted into. Here are the top pairings:

Card	Category 1	Category 2
About the AAFP Library	Job Aids	Work Areas
Helpline	Job Aids	Work Areas
Installing a Printer	Job Aids	Facilities
Recording Time in Workday	Pay and Benefits	Policies and Procedures
Telephone Use	Policies and Procedures	Work Areas
Work Spaces	Facilities	Policies and Procedures

Download: Comments on multiple categories.xlsx

Comments:

1. I could see on-site wellness falling under socialize or facilities since group fitness classes are offered. HelpLine is a work area but can also serve as a job aid. I could see the explaination of compensation falling under policies or pay and benefits. I think recording time could go under pay and benefits or policies. I think installing a printer could go under facilities or job aids.
2. I think some of these could go under facilities and/or job aids. On Site Wellness could be under benefits or facilities.
3. No double listings needed.
4. I didn't know whether most of the checked items dealt with policies or were instructional. There were a couple of items that might have been related to teams or socializing.
5. AAFP Brand: (1) Policies and Procedures and (2) Organizational Strategy Telephone Use and Cell Phones: (1) Policies and Procedures and (2) Work Areas Toastmasters: (1) Job Aids and (2) Socialize Hotel and Meal Caps, Making Hotel Reservations and Paying for teambuildings, recognitions and meals: (1) Job Aids and (2) Policies and Procedures Signing up for Emergency Alert System: (1) Facilities, (2) Job Aids, and (3) Policies and Procedures Items I felt didn't fit any of the categories: Classes of Protected Veterans, About the AAFP Library, and the two divisions, Alliance for eHealth Innovation and Health of the Public and Science.
6. Because some could be in two categories like Telephone use could be in policy and also in Job Aid. About the Library would be in a Work Area or in Job Aid. Work Spaces could be in facilities and job aid Was not sure where to put working with vendors, recognition awards, paying for teambuilders... Hotel and meal caps could be a policy and also a job aid
7. I think if items are categorized correctly having them in more than one place is not necessary.
8. All those checked are ones I put more thought into/didn't seem as intuitive. For example, to me Balanced Budget Policy and Board Provisional Policy make the most sense as part of Organizational Strategy (more "big picture"), but could also fit under Policies and Procedures. Similarly, Paycheck Procedures in my opinion makes the most sense as part of Pay and Benefits, but could also fit under Policies and Procedures. I checked IT Support and Installing a Printer primarily because I think it might be helpful to have a category specific to just IT.
9. To me, the manager resources and training did not seem to fit in any of the categories. I think there should be a separate category maybe for development. Cell phones could be in both Facilities or in Pay and Benefits or even Policies
10. ACT could also be social,veterans seems tied to HR so I might naturally want to look under pay and benefits, data seems tied to IT so I might want to look under their work area, Help Line is a work area/part facilities and could include some use policies since what they cover is so broad, and recognition was just hard to place
11. Debated between Facilities, and policies and procedures

12. ACT Team - unclear if this is JUST socializing, since it is an official organizational employee-wide effort / benefit (receiving days off, etc.) About the Library - could be both a job aid and an area Cell Phones - is this cell phone policy/office use? or info on using personal phones for business/reimbursement? Evacuation Routes - both facilities and potential HR doc if HR has an area helpline - unclear to new employee - is this meeting facility set up? or is other assistance? is it also a "job aid" document? Paying for Teambuilding - this could be a manager resource, as well as budget policy Recognition - this could be both an HR item as well as manager resource Recording time - this could be both in pay/compensation as well as a resource/job aid Shipping/Mailing - this could be both a facilities item (deliveries, pick ups, pick up before/after hours) as well as a manager resource or job aid Emergency alert - could be both an HR item as well as a facilities item
13. There are a lot of things that are both a policy/procedure and fit in benefits/pay or facilities.
14. I struggled with job aid vs. policies and procedures for these items but I don't really think they fit in either category.

Were any of the following categories confusing?

1. **Work Areas: (11) 55%**
2. Organizational Strategy: (5) 25%
3. Socialize: (5) 25%
4. Job Aids: (4) 20%
5. Facilities: (3) 15%
6. Pay and Benefits: (2) 10%
7. Policies and Procedures: (2) 10%

Comments:

1. I wasn't sure if certain things that related to reimbursement would fall under the policy section or reimbursement section. It'd help to define what "organizational strategy" means.
2. Do you mean like Divisions? Segments? Strategic plan categories? Physical workspace? Other?
3. The only thing I had trouble categorizing was the EMT notes. Also, it was interesting to me that there are many more work areas at the Academy than the two that were categorized.
4. Does Work Areas refer to physical space such as an office cube or an on-line repository where work items might be found?
5. Wasn't sure what should go in those categories, but I tried.
6. I didn't know if it's referring to your physical work area or your area of work, e.g., what kind of work you do for the AAFP. I went with the former since the latter would then be similar to Job Aids.
7. Perhaps work areas should just cover a list of every segment (segment Sr. VP), and every division (division director). Socialize seems like an odd category for primary the Act Team activities.
8. Was not sure where to put On-site Wellness, social or under pay and benefits. Or could Pay and Benefits be more general and say Human Resources or our current Life and Career is a good heading. P & B was limiting. Policies and Procedures can also be a Job Aid even though I did not check mark those.
9. Organizational strategy can such s distribution as well as HR strategies. I think they should be separate, If I wanted to look for something from the HR, I would rather click on a box that will have all things related to HR. If I was looking for distribution, vice versa. C553S139_48
10. Too vague
11. Socialize: I wasn't sure if this should include only items not really work related (for instance, I don't know that there is anyone on staff who has a job requirement to be a notary, but I imagine there is someone on staff who is and would be willing to notarize documents for others if needed). On the flip side, the ACT Team and Wellness Resources may be more social in nature, although I also consider them benefits available to all employees. Work Areas: I think this could be interpreted as divisions/departments OR physical work spaces /areas (i.e. offices, conference rooms, multi-purpose room, etc.)
12. Not sure what "Work Areas" is supposed to mean. Does it mean departments and divisions or does it mean the physical work area? I assumed it meant an organizational work area like a division. Socialize could also include the INGs. Toastmasters could be Socialize (as an ING) or in Development if we created a new category.
13. Facilities...I looked up the definition to see exactly what the definition was
14. Is job aid just a reference document? what does it entail? is it an organizational reference or is it specific to a role reference/aid? I think when pressed, most people don't think in terms of "policies and procedures" they think of areas and how it relates to them and their role. How you do what you do vs. rule of the organization? Procedure could mean job aid but it may also fall under a employee wide/HR consideration. Travel budget rules could be policy, it could be job aid, it could be compensation/HR.
15. Does organizational strategy primarily address members? Are work areas departments?
16. Work areas - Unclear and not the term we use internally. Divisions? Teams? Facilities and Policies and Procedures seem to have overlap Job Aids - is resources a better term?
17. Facilities - Are you referring specific to the buildings? Job Aides- is this referring to reference materials to assist with your job? Some topics might fall under job aides or policy and procedure Work Areas - Division or department-specific? I think this name should be changed Organizational Strategy- Confusing name to me. Not sure if this is referring to just the Academy as an organization or departments as well. Several categories could fall in that bucket.
18. It depended on how the items were worded, they could have gone in either category depending on the nature of the information. For example, a job aid on how to use the phones vs. policies on phone usage, etc. If I needed instructions on how to contact IT, I'm honestly not sure which category I would go to, to try and find that information. Manager resources is another one that does not have a category that resonates with me.
19. Not sure if this is physical work areas or naming convention?

Exit Questions / User Comments

What other pages or tools do you think the staff intranet should have?

1. A category called "Branding Guides" might be valuable More categories around IT or helpful guides might be good. Something called "IT documents" or "New Hire docs" or "Set-up documents"
2. A page dedicated to IT may be helpful, as mentioned above. There also used to be an org chart on the site that I found very helpful. I've not been able to find a similar page since we made the switch to Workday. Workday lists who reports to whom under individual employee names, but the chart (for those of us who are more visual) was a easier way to see the big picture in my opinion.
3. AAFP Events and celebrations
4. all the templates and forms. I still don't know where to go to find the new powerpoint template.
5. Can some pages be archived? There is a lot of old information on the current staff intranet.
6. Database/Access to commission work (policies and resolutions passed each year) in an easy to access tool. Database/Access to listing of corporate sponsors/donors with whom we have an existing relationship above and beyond vendor A page for each department with a brief descriptor of what each department does, the staff, and significant work/areas under their domain. (for example, if someone wants to know who to contact about advertising in an AAFP journal, they could go that page, see the staff listing, and then be informed in their initial contact.) An overall organizational page with information on how our organization fits in with other family medicine organizations (STFM, AFMRD, others, etc.) Page or place where we could submit ideas or questions about improving from small to large processes, without the worry of having to develop an elaborate budget and justification of the idea. Simply an employee idea box - This could be anonymous, this could fuel potential discussion ideas presented by Shawn and others at the quarterly(?) meeting.
7. Development which would include resources like the managers resources as well as training materials.
8. easily accessible versions of the latest templates - letters, memos, summaries, and other AAFP branding **an easy to find and read procedure for how to search our membership**
9. Good search functionality that doesn't depend on tagging.
10. I really wish the search function worked better. I can never find what I'm looking for when I do a search and it always seems to populate old items instead of new regardless of the search or the tools I use.
11. I use the forms tab alot, I think we should keep that one. If there was one for Meetings, it could include everything related. Meeting Dates and Deadlines, vouchers, booking forms etc.
12. It would be nice to have the birthdays and work anniversaries back in the spirit of "keeping it fun"
13. Let's keep news and staff updates please Can we add security/id badge pictures of new employees? Where to find it guide? Sometimes I still unsure when to go to intranet vs workday vs somewhere else
14. Maybe a trending list to show what resources are in demand by the members
15. organization chart with picture so that we can see who's who
16. Organizational Structure - descriptions of the different segments and divisions Work anniversaries and birthdays
17. Searchable staff directory beyond the workday version- if you know what area someone works in but have no additional information, there is no way to use Workday to narrow down who they are.
18. Staff Calendar and Staff News that doesn't fit elsewhere
19. templates and quick links.
20. The Forms current page is helpful as is Staff Calendar and News.
21. We need tools for CME compliance as the Academy is accountable for complying with ACCME accreditation. Today there is a compliance work area page with many different tools. That wasn't captured here.

Free Comments:

1. Copy editing uniformly would be nice
2. Great work by our IT team to continually optimize our web site
3. The staff intranet should be easily searchable. The other day I searched for "work from home" and "remote work" and all kinds of synonyms and permutations for the information about the timing and plans for staff to regularly work in the office in 2021, and couldn't find it. I finally resorted to searching my emails for the Pulse+ email that included a link to The Source page. Both "work from home" and "remote work" show up in both headings on that page. I've also searched for the Use of the AAFP Seal Policy by typing in "use of the seal", "seal" and "use of the logo" to no avail. And searched for the Vendor Referrals/Recommendations Policy by typing in "vendor referrals" and "vendor recommendations" and "vendor endorsements" to no avail. Apparently, you have to go to the Policies and Procedures page and scroll down until you find them both.
4. The listing of forms/templates are nice, but could be under Job Aids.
5. I like Work Areas because not all staff work in a division; some are in departments that report to a Sr. VP and are a part of a segment.
6. The staff intranet now, as it is, is almost never helpful. A good search would be the most important function. I also feel like it could help to have division contributors who know what stuff from their division is on the intranet, and know to update it when things change.
7. If there could be an undated list of the EMT Support Staff which would be updated as staff turn over, that would be great. It could remain under the EMT section. Just a thought.

Next Steps

Move the pages with the most confusion to new categories that make more sense to staff. Then take a look at the feedback about the categories and pages that need to be in multiple categories as chances to cross link across the site. If there is additional time we could run a tree test with the top tasks that staff will be doing on the website to confirm these changes have made a difference. However, this is not necessary.

Related

- REPORT: Sharepoint Card Sort from Q3 2020
- Categories.txt
- Items.txt