A Case Study with Citrix ShareFile: Advocating for Information Architecture in Product

Start

Our challenge: Redesign the Web App Navigation for ShareFile, a file sharing service and application.

Action Items
- Design the navigation, then testing
- Design based on assumptions rather than customer feedback and data
- Define context - where we are and where we want to go

Takeaway: Wait! Before jumping into design, consider if your project also requires an information architect (IA). An IA paired with a researcher helps get both context for the structure and customer feedback on how users might want to label, group, or organize content.

Result: We decided to take a more prescribed approach to understand the application's structure holistically; therefore, we pulled in an information architect.

1 Project Planning

Kickoff the process to set expectations and eliminate preconceived notions.

Action Items
- Create a project brief
- Determine goals and outcomes
- Outline timeline and milestones
- Define roles and responsibilities

Takeaway: By outlining goals and requirements, the team has a clear plan to work from to ensure the project starts off on the right path.

Result: We had clear research objectives, milestones, and a timeline to move forward.
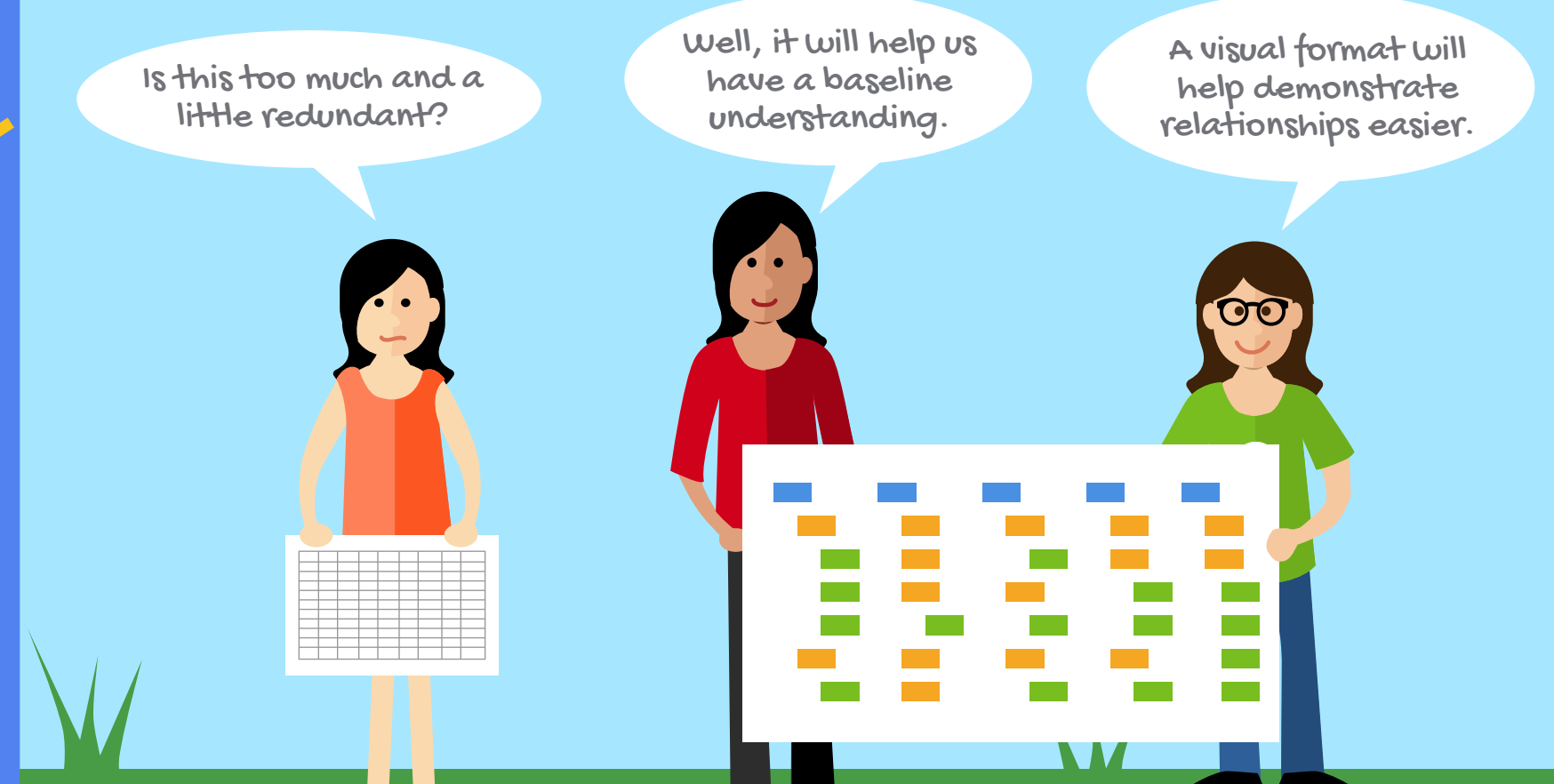
Artifact: Project Brief

2 Content Inventory + Visual Site Map

Understand the current structure and content within app. Present the data in a consumable format.

Action Items
- Catalogue content in web app
- Establish hierarchy of audited content
- Determine the format for visualization
- Create a flowchart for data

Takeaway: It takes some work, but a content audit and inventory done in tandem shows the current state of a structure. Layering a visual sitemap with the inventory can provide another way to see the groupings or breakdowns in the information's hierarchy.

Result: We understood the app better, identified the gaps, and challenges areas to help us with future testing considerations.

Artifact: Content Inventory (spreadsheet) + Visual Sitemap

3 Proposed Information Architecture

Revise the information architecture based only on assumptions.

Action Items
- Evaluate the categories and organization
- Propose new category ideas and organization
- Design the new hierarchy in a visual format

Takeaway: Building off of Steps 1 and 2 creates a foundation that can be used to map out decisions on groupings, labels, and categories.

Result: A view of our current information architecture and what changes we have made that requires testing.
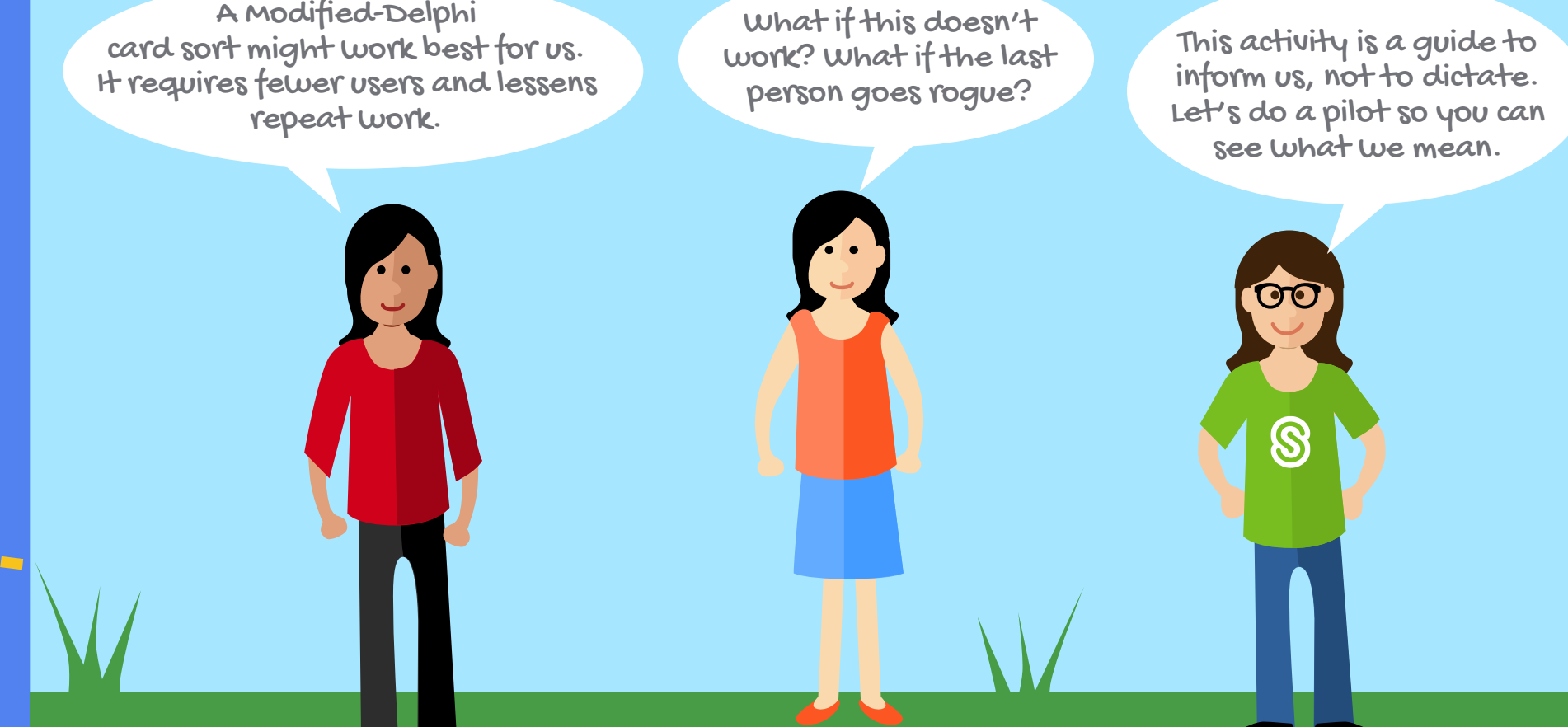
Artifact: Revised Visual Sitemap

4 Research Methods & Participant Selection

Find the best research approach to validate and test new labels, categories, and assumptions. Consider test fatigue, sample size, and desired data.

Action Items
- Examine goals for testing and decide a method
- Create cards, study plan, and participant screener
- Recruit mix of user types for participants

Takeaway: Choosing the right approach based on your objectives, goals, and desired outcomes can help amplify insights. Planning a pilot can alleviate any initial skepticism in the approach.

Result: We decided that a Modified-Delphi card sort (#6) and two rounds of navigation tree testing (#7) were appropriate for us. We also scheduled a pilot to mitigate any risks and practice our logistics.

5 Pilot Session

Run through logistics to discover issues and fix them before testing with real customers.

Action Items
- Setup logistics to capture the sessions
- Run at least two sessions
- Tweak sessions as needed

Takeaway: Pilots can quickly reveal sticky situations, which you can fix for the real test. They can also help others see the method in action to get a better understanding.

Result: We removed some categories to focus on our areas of interest and reduce participant fatigue.

6 Modified Delphi Card Sort

Run the card sort with 6-8 people to get qualitative insight.

Action Items
- Identify the "seed" participant who creates the initial structure
- Allow Participants #2 through #8 to review the previous participant's work and make changes
- Take notes and record sessions
- Take photos each participant's structure
- Determine structural consensus and themes
- Create a research findings report

Takeaway: With the Modified-Delphi approach, don't be alarmed when a pattern doesn't appear instantly. Results tend to "boomerang" - they run away, but come back to a logical place in the end.

Result: We redefined the structure based on customer insights and their mental model of using the product.

Artifact: Card sort results

7 Navigation Tree Test

Test a simplified, text-only version of the structure to help get quantitative data to supplement qualitative data.

Action Items
- Conduct a test of the current structure
- Conduct a test of the proposed structure
- Compare results
- Create a top line report for each activity

Takeaway: A text-only version removes the influence of navigation aids and visual design to truly test the labels, groupings, and categories. Determining user tasks is important. Select tasks that are appropriate for 80% of your core user base.

Result: Our current structure measured task success at 49% compared to our proposed structure, which scored a 65%. That's a 33% increase in overall task success!! We realized our efforts were beginning to pay off.
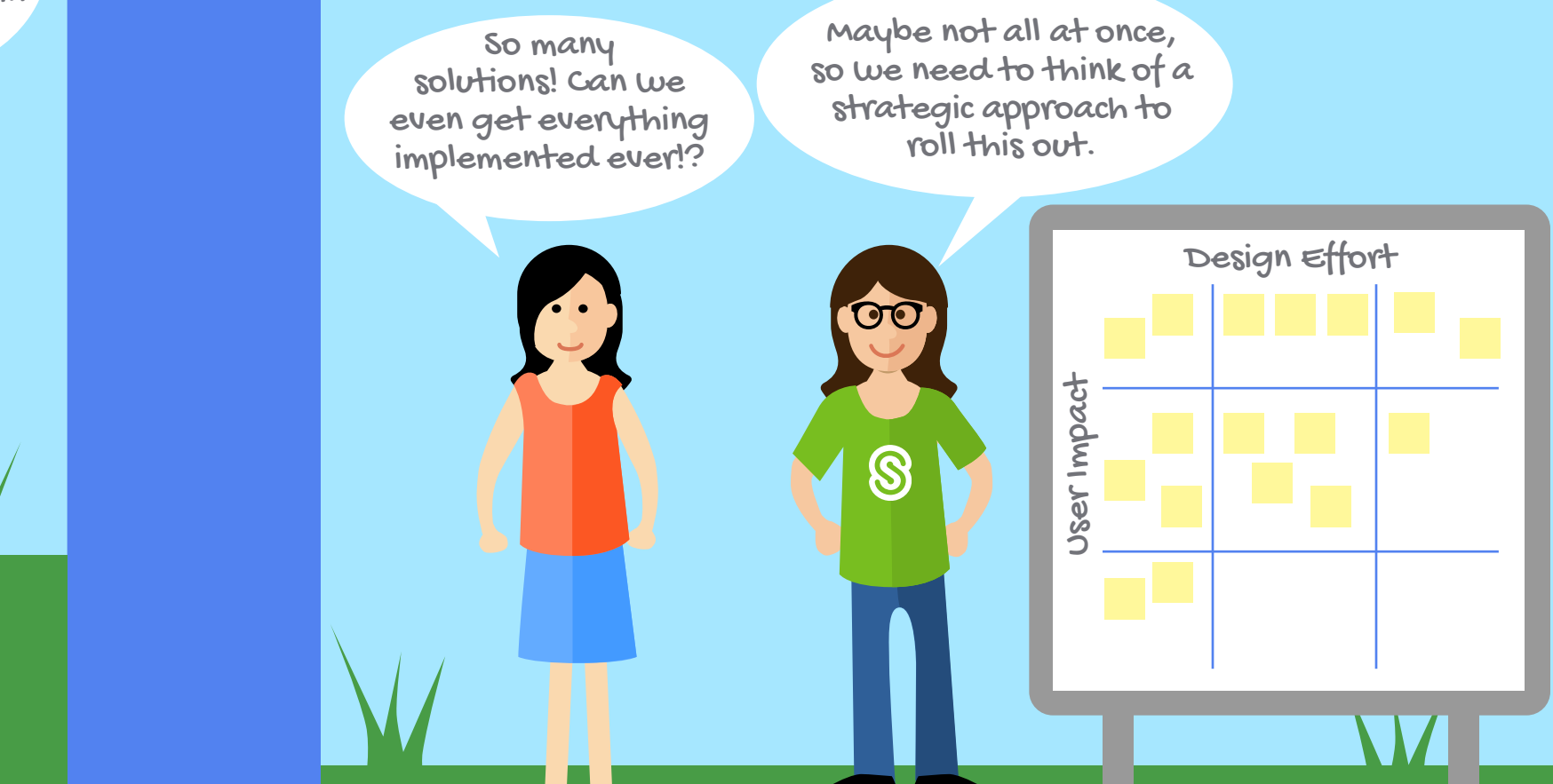
Artifact: Tree test and pie tree (Treejack)

8 IA Improvements and Impact/Effort Matrix

After testing, determine what is required to change the IA and prioritize the effort against the level of return.

Action Items
- Review research reports
- List improvements informed by research
- Determine what level of effort vs. return for users

Takeaway: Each activity yields a ton of data and insights, be sure to create an action plan that maps back to learnings and prioritizes how to move forward.

Result: We found ideas ranging from low-hanging fruit to large initiatives. We picked some design solutions and begin the next cycle of iterative testing.

Artifact: Impact/Effort Matrix

9 Findings Presentation

Share findings to help inform the full design team, product managers, and other stakeholders.

Action Items
- Deliver presentation with both qualitative and quantitative data
- Share the roles, process, and results to demonstrate the value of the effort

Takeaway: Sharing is caring! The value of this research goes beyond the core product team; therefore, socializing the results is important.

Result: We saw skeptics turn into believers and both designers and spectators shared their takeaways about the process that helped inform our design.

Artifact: Team Presentation

10 Executive Buy-In

Demonstrate the lasting value of the activity and insights gleaned to upper management.

Action Items
- Meet with executive-level decision makers
- Present data and articulate findings in an consumable manner

Takeaway: Find a good balance between high-level details and sharing the data so everyone can understand the value behind the work.

Result: Through carefully articulating our findings, our executives understood the value and learnings from the effort. They even wanted to know more! This provided us with more time and resources to further investigate.

11 Epilogue

Reflect back on the process, identify what worked or didn't work, document it, and move forward.

Action Items
- Conduct post-mortem with team
- Improve the approach for future projects

Overall Results
- We used this approach to inform other projects
- We are able to confidently make decisions for our Web App going forward
- We demonstrated the value of this type of research and design for our company
- Our customers loved being a part of the process, and we value their feedback!

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