Card Sorting

Practice Areas	Related Methods	Time Needed	Materials
Design, Research	🗏 Usability Testing 🗏 Content Inventory 🗏 Tree Testing	**Prep time:** 1-2 days **Session time**: 30-60 minutes	**(If remote)** Tools that allow for presenting, moving, placing, and naming concepts and groupings, like OptimalSort **(if in person)** Papers labeled with individual concepts, papers for labeling groups of concepts

What

Card sorting enables us to understand the mental models users have and how they associate and understand concepts and data.

Why

The connections designers and researchers make between topics and concepts may or may not bear any resemblance to the way their products' users connect those concepts. Card sorting allows a UX team to better understand how their users categorize and link ideas and topics, and accordingly how to present information in a way that supports these categorizations.

When to do this

Card sorting is most frequently used to determine how best to divide, group, and present content among pages on a website. It should be performed when the team has a good idea of the types of content or themes to be included and is ready to figure out how best to organize them.

Pros and cons

A short description of why this given method can be helpful, as well as any potential downsides or risks to consider.

Pros
A card sort can give you an insider look at how users would like to interact with or conceptualize information.

Cons
Individual preferences can introduce a lot of variation in responses, so card sorts often need a higher number of participants to show clear patterns.

How

Card sorts can be open (participants group the topics, then give their own names to their groupings) or closed (the facilitator has chosen discrete categories for participants to sort topics into).
Give participants a collection of topics or ideas presented on cards.
Ask participants to sort into categories based on their own understanding
Have participants explain their grouping choices

If conducting the study in person, facilitators can use sticky notes and index cards.

A tool like OptimalSort makes it easy to set up a virtual card sorting activity and allows facilitators to run the activity moderated via screen sharing or unmoderated by sending out a study link directly to participants.

Touchpoints

- **Engineering**
  Invite to observe sessions and share results with them so that they can have more context for technical direction.

- **Stakeholders**
  Include in planning, invite to observe sessions and share results with them so they can hear directly from users and gain empathy.

- **Product**
  Include in planning, invite to observe sessions and share results with them so they can gain insights for future features

- **Design**
  Include in planning, invite to observe sessions and share results with them so that they can hear directly from users. Collaborate on solutioning to identify information architecture patterns that can help address issues found.

Ad Hoc

Case studies / examples

VA Lighthouse APIs	VA Mobile app (Android / iOS)	
Researchers conducted an online card sort in which we asked participants to sort a list of potential API attributes into the categories Excellent, Good, Minimum Acceptable, and Unacceptable. Results showed that more than half of the attributes were categorized in the same way by a majority of respondents, suggesting general agreement. The others had a more diverse spread, indicating less agreement and needing further discussion.	The VA Mobile team conducted a two-phase study to inform initial app navigation and content structure.	

Learn More

More resources for how to apply this method

- 18F Methods: Card Sorting

Ad Hoc Blog Posts / Resources

Additional Ad Hoc guidance or thinking on this method

- Creating a flagship mobile app to meet Veterans' needs

- How to keep your research practice going in a remote world