**How to Conduct a Card Sort**

**Prepare the cards**

1. Create your list of content topics. Topics can be phrases or words, very specific or more general. As a suggestion, limit yourself to 50-60 topics or less. This means there might not be a card to sort for every page on the site.
   * For a new site, list the content topics of types of information that you are likely to have on the site
   * For an existing site, list the most important / popular types of content
2. Decide whether you will be doing a physical card sort or using online card-sorting software.
   * If you are using online card-sorting software, consult the software instructions.
   * If you will be conducting a card sort using physical cards, write each topic on a separate index card.
     + Use a word processor. It may help to create the cards as ‘labels’. The cards will be neat, legible, and consistent.
     + Number the cards in the bottom corner or on the back. This helps you when you begin to analyze the cards.
     + Have blank cards available for participants to add topics and to name the groups they make when they sort the cards.
     + Consider using a different colored card for having participants name the groups.

**Set-up the session**

1. Plan about one hour for each session, longer if you have many cards.
2. Arrange the space.
   * For paper card sorts, ensure the participant has enough room to spread the cards out on a table or tack/tape them up on a wall. A conference room works well.
   * For online card-sorts, ensure there is a computer with an internet connection available as well as room for both the participant(s) and facilitator to sit comfortably.
3. Plan to have the facilitator or another usability team member take notes as the participant works and thinks aloud.

**Lead the session**

1. Show the participant the set of cards. Explain that you are asking for help to find what categories of information should be on the site's homepage and what those categories should be called.
   * In an open card sort, explain that you want to see what groupings of cards make sense to the participant, and that you will ask for a name for each group of cards once the participant has grouped them.  
     If you are conducting a closed card sort, explain that you want to see how the participant thinks the cards fit within the defined groups.
2. Ask the participant to talk out loud while working. You want to understand the participant's thoughts, rationale, and frustrations.
3. Let the participant work. Minimize interruptions but encourage the participant to think aloud. Allow the participant to:
   * Add cards - for example, to indicate lateral hyperlinks or additional topics.
   * Put cards aside to indicate topics the participant would not want on the site.
4. If, at the end, the participant has too many groups for the homepage, ask if some of the groups could be combined.
5. Ask the participant to name each category.
   * In an open card sort, give the participant a stack of different colored cards. Ask the participant to use the colored card to name each group. Ask what words the participant would expect to see on the homepage or second-level page that would lead the participant to that particular group of content items.
   * In a closed card sort, asking about word expectations, their final card organization, and other follow up questions can provide valuable insight and observations for your research.
6. At the end, thank the participant and give the payment or other gift if promised.

**Analyze Your Data**

1. Prepare your data for analysis.
   * If you used online card-sorting software, consult the software instructions. The software will analyze participant data in a variety of ways.
   * If you used physical cards for the test, either photograph the sort or use the numbers on the cards to quickly record what the participant did. Photograph or write down the names the participant gave to each grouping and the numbers of the cards the participant included under that name. Then you can reshuffle the cards for the next session.
     + Create a computer file for each session to gather a complete picture of the detailed site map each user creates.
     + Work from your original list of topics and move topics around to recreate each participant's groupings and enter that participant's name for the groupings.
     + If you used a physical card sort, you can also take a photograph of the finished card sort for reference later.
2. Analyze qualitative information based on user comments.
3. Analyze quantitative information based on:
   * Which cards appeared together most often
   * How often cards appeared in specific categories
4. For a less detailed analysis of the results, use your notes and recordings of the participants' names and card numbers under each person's name to find commonalities from different sessions.
5. For a more detailed analysis, consider using an Excel spreadsheet to show the relationship between the cards or use one of the available software programs to analyze your data.
6. Pull together your findings in a [report](http://www.usability.gov/how-to-and-tools/resources/templates/card-sort-report-template.html) to share with your team and stakeholders.

After you analyze the data from card sorting, you should have useful information for structuring the information architecture of the site. You should use the results of your card sort to help you define the navigation of your site.

**Best Practices for Card Sorts**

* Limit the number of cards. It is tempting to want the participant to sort "ALL" of your content, but be mindful of participant fatigue. We would recommend 30 to 40 at the absolute outside, especially for an open sort.
* If possible, randomize the order of presentation so that each piece of content has a chance to be sorted earlier in the session.
* Provide the participants with an estimate of how long the card sort will take before beginning the session to help them better gauge the required time and effort.
* Consider the benefits of requiring participants to complete your sort. For an open sort, if possible consider requiring them to sort the cards, but perhaps not to label them, since that might be the more challenging part of the task, providing you have limited your items as suggested.
* Consider an open sort as part 1 and a closed sort as part 2 of your process. One allows you to learn what goes together, while 2 allows you to really test out your labels to see if they are intuitive to your participants.