

What are we going to call the Exit sign?

How a Gut-Instinct Classification Approach can help you choose the right classifications for your website

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Classification: foundation stone for web success

When people come to your website, they have 'trigger words' in their heads. They're looking for 'laptop computers', 'voice-mail systems', 'bargain holidays', 'mortgages', 'support', 'forms', etc. If their trigger words match the words you have in your content and classifications, you're one step closer to success. If not, they may well hit the Back button.

Classification is how you organize and group your content. (It is sometimes referred to as taxonomy or categorization.) Often undervalued, it is crucial to website success. People hate to wait on the Web. They are impatient and they scan-read. If they don't find their trigger words in your classification, you're losing them.

Classification is strategic. Do you have customers or clients? (Product companies have customers; consultancies have clients.) Do you offer products, services or solutions? The words you choose require careful consideration. They require the involvement of a wide range of interested parties. They require sign-off at senior management level.

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Considering how important classification is to website success, it is surprising how often it is approached in an ad hoc manner. Sometimes, the opposite is true. Classification comes under the microscope. Everyone has an opinion. Everyone wants their department or product to get prominence.

There is a golden rule in design: 'Do as I do, not as I say'. This rule is particularly relevant when it comes to web-classification design. Let's say you are part of the team designing a new airport. What are you going to call the Exit sign? Why not Exit? What are you going to call Arrivals and Departures?

Strange as it may seem, people spend lots of time in esoteric debates about what words should be used for certain classifications. Some people want to choose words that are different. The last thing you should try and be with classification design is different. What are we going to call Home, About Us, Contact Us, Help, Products, Support?

Classification is political. Everyone wants their say and some will stubbornly insist that their pet words should be included. Classification can become organization-centric. Choosing the words and terms that have 'always been used around here' is not always wise.

Some time ago, I listened to a speaker announce survey results at a conference for universities. A great many universities, particularly in the United States, call potential students 'Prospective Students.' Funny thing is, when surveyed, these potential students didn't like the term. I saw shocked faces in the audience. "But that's what we've always called them," I heard someone say plaintively.

Just who are you classifying for?

Who are you trying to reach with your website? You must answer this question in a very specific manner before you can make any real progress in classification design. If you have an intranet, it's not enough to say your target readership is staff. You've got to be a lot more specific than that. You should have distinct readership types you want to reach: sales reps, product developers, support staff, etc.

When a large pharmaceutical company set up its first website, it targeted doctors because doctors were who it always dealt with. However, after doing some research, it found that less than 10 percent of people coming to the website were doctors. Some 60 percent were patients and caregivers.

If you're trying to reach patients, rather than doctors, you need to rethink your classifications. Instead of using Cardiovascular Disease as a classification, you should consider using Heart Disease. Use the words that your target audience are most familiar with.

Before you begin your classification design process, do the following:

- Define no more than five core reader types that you are trying to reach with your website. If you have more than five reader types, you begin to lose focus for your website.
- Imagine that you have 100 hours to create content for them. If 60 percent of your readers are patients and caregivers, it makes sense to dedicate 60 hours worth of content to them.
- Essentially, this hourly allocation becomes a percentage estimation of how much emphasis you should give to each reader type on your website. If, for example, patients and care givers get 60 percent, then roughly 60 percent of your publishing efforts should be focused on them.

Everyone sees classification differently, right?

Absolutely wrong. This is one of the biggest myths of classification design. Put 20 people in a room, it's said, and you'll get 20 totally different views on classification. Wrong. In Australia, Asia, America and Europe, I put some 600 people in rooms to design a classification for a tourism website. The consensus was amazing.

Some 64 percent agreed on the same top 10 classifications, out of 136 potential options. The bottom 70 potential options were chosen less than 3 percent of the time. Whether you are in Boston, Belfast, Brussels, Brisbane or Kuala Lumpur, there are certain fundamental trigger words you expect to see on the homepage of a tourism website.

The top 10 classifications chosen for this imaginary Irish tourism website were as follows:

1. Accommodation
2. Special Offers
3. Things to Do & See
4. Getting Here & Around
5. About Ireland
6. Planning a Trip
7. Best of Ireland
8. Contact Us
9. Irish Vacation Packages
10. About Us

Do the above classifications seem logical to you? Do they make sense? Would you like to know how 600 people from all over the world quickly came to a consensus around these choices? Read on.

Use your gut instinct

People scan read on the Web. That means their eyes move quickly and they make choices quickly. 'Accommodation', 'Special Offers' and 'Things to Do & See' were the choice of 36 percent of people in my tourism study. These trigger words are instinctive—you don't even think about them. You don't consciously say, "I want to see these words"—it's a subconscious expectation.

I've been involved in web classification design for many years. Again and again, I have found that when people sit in workshops something strange happens. They start talking about classification in a purist, esoteric way.

Some people come with pet terms and they will defend them to the end. Some people are fighting a political battle. Endless debate ensues. The result is often a mangled classification that nobody is satisfied with—particularly the target reader.

We need to trust our gut instinct on this one. We need to find out the classifications we would look for in that first 30 seconds as we scan the webpage. But how do we find these choices? We use what I call a Gut-Instinct Classification Approach (GICA).

How the Gut-Instinct Classification Approach (GICA) works

GICA involves getting a group of carefully selected individuals to quickly sort through a selection of classification cards. They choose their favourite 10, then rank them, giving 10 to their most favourite, 9 to their second favourite, and so on. The classifications that get the highest scores are a strong indication of what should be chosen.

With GICA, you should start off by focusing on the top-level classification—the classifications people see when they come to the homepage. It is essential that this gets signed-off by senior management before going on to decide lower levels.

GICA has the following core advantages:

1. The process of quickly sorting through cards allows people to make instinctive choices. These choices reflect what people would actually look for when they come to a website, rather than what they think they would look for.
2. GICA is a statistical process. You will end up with a range of scores at the end of the process. It will be easy to see what classifications were popular and what weren't.
3. GICA is a defensible process. Often, it is hard to defend classification choices. You can say you spent a lot of time in workshops, but it's often hard to say exactly why you chose one classification over another. GICA gives you some hard statistics that will show that one classification scored far higher than another.
4. GICA is fast. Once you have done the situation analysis, the actual sorting and analysis steps are quite quick. The process of defining the top-level classification using GICA shouldn't take more than two weeks.

GICA has a number of distinct steps:

1. Select classifications for the test group to choose from.
2. Get people to choose and grade the classifications from printed cards.
3. Analyze and refine the results.

Step 1: Select classifications for the test group to choose from

This is a critical step. It is time-consuming—taking about a week—but if you get it right, everything else should run smoothly. It is vital that the range of classifications you choose is comprehensive and that you gather every possible classification. Otherwise, the whole process is undermined.

Type all the potential classifications into a spreadsheet. List your sources for the classifications. Don't worry about classifications that are similar; the scoring process should bring the popular ones to the top. Also, remember, this is for the top-level classification design, so don't worry too much about getting lower level classifications.

The areas you should examine in the classification situation analysis include the following:

1. **Organization objectives and strategy analysis:** Analyse your corporate objectives and mission statement. What are the core trigger words or terms that stand out? What area of business do you want to be leader in? Remember, your classification is the ultimate distillation in words of what you are about.
2. **Ask your website readers:** You've already got your top five reader types. Talk to a representative selection of them. Brainstorm with them. List all the classifications they can think of.
3. **Current content analysis:** Gather potential classifications based on your current content. List the top-level classifications you are currently using for your website.
4. **Common search words analysis:** If you have a current website, list the most common words or terms that people use when searching it. (Use log analysis

- software to do this.) These words or terms can be a good indication of what classifications people expected to see when they came to your website.
5. **Talk to the writers and editors:** Their job is to create content for your website. If you have librarians or other information specialists, talk to them. (In fact, they should be actively involved in the whole process.) In particular, talk to people who are potential 'trouble makers.' Make sure you get their favourite classifications.
 6. **What are your competitors doing?** How are your top four-six competitors classifying their content? Add these classifications to your list.
 7. **Get ideas from industry publications:** Examine industry publications. If it's print, look at their contents page to get a of list classifications.
 8. **General industry analysis:** Are there any industry groups involved in developing a common classification approach? This could be a powerful source of potential classifications.

At the end of your research, you will have developed an extensive list of potential classifications. You should have at least 50 and ideally about 150. Your next step is to turn this list into cards.

I have found that the ideal type of cards are blank business cards that come in A4 sheets and can be used with a normal printer. It's relatively easy to modify the column and row structure of your spreadsheet to get a layout that matches the layout of these sheets.

Place your list into this new layout, print it out, separate and stack the cards. Depending on the number of people you want to test, you might need to do about five sets. Don't worry about classifications that are very similar. People will choose what their favourite is.

Step 2: Get people to choose and grade the classifications from printed cards

Now that you have your deck of cards, it's time to get people to choose classifications. You should aim to get 30-50 people involved. Make sure that you focus on the following groups:

1. **Senior management:** Classification is a strategic activity. It is the foundation upon which the information architecture of your website is built. It only takes 15-20 minutes to sort the cards and make the choices. If you don't get senior management involved early in the process, they will get themselves involved later on. As you're about to launch, some senior manager will say: 'Why wasn't I asked my opinion about this?'
2. **Focus on your target readers.** You've defined your five target reader types. (There's no point in carrying out GICA if you haven't.) Let's assume the following:
 - a. You're going to get 50 people to sort the cards in order of preference.
 - b. 10 of these people will be senior management and others.
 - c. 40 will be for your target readers. (Obviously, the more important target reader types should be the most represented in the sorting process.)
3. **Make sure you get the 'trouble makers' involved.** There are always people who love to give their opinion. If you don't ask them for it, they'll cause you hassle. Get them to sort and score. Then they've very little argument if they don't like the results.

Before any sorting begins, make sure people are clearly informed about what the core objectives of the website are and who the website is targeted at. When getting people to sort the cards, ensure that:

1. They are asked to select the top 10 classifications of their choice, and to score these, with their first choice getting 10, their second getting 9 and so on. (Emphasize to them that they should give 10 to their favourite, and not 1; as this is a common mistake.)
2. They do it on their own.
3. They do it quickly; 15-20 minutes should be enough. (Do not let them go over 30 minutes.) This is very important. The less time people have to 'think' about the classifications they see, the more likely they are to choose classifications they would actually choose on a website, rather than the classifications they *think* they should choose.

Step 3: Analyze the results

To analyze the results, do the following:

1. Create a spreadsheet with all the classifications listed in alphabetical order.
2. Create a column for everyone who is carrying out the sorting and scoring.
3. Place the relevant score in the appropriate column for each participant.
4. Create a total column which gives a total mark for each classification.
5. When all the respective marks of the participants have been entered, sort your spreadsheet based on the total column, highest mark first.

What you will get is a list showing the classifications that have received the highest total marks from all the participants. What you should get is something that looks like Table 1.

| | | | | | | | | | | |
|-------------------------|----|----|---|----|---|----|----|----|----|------------|
| Special Offers | 9 | 5 | 3 | | 8 | | | 6 | 6 | 975 |
| Accommodation | 2 | 9 | | 5 | | 3 | 7 | 7 | | 918 |
| About Ireland | | 10 | 9 | | 4 | 5 | 9 | 5 | | 597 |
| Planning a Trip | 6 | | | 10 | | 10 | | | | 584 |
| Getting Here & Around | 5 | 8 | | 7 | | 4 | | 10 | 7 | 509 |
| Things to Do & See | | 6 | 8 | 3 | | | 10 | 9 | | 502 |
| What to See & Do | 7 | | | | | 9 | | | | 464 |
| Deals | | | | 4 | | | | | 8 | 425 |
| Book Travel | | | | | | | | | | 404 |
| Best of Ireland | 3 | 4 | | | 7 | 7 | 4 | | 9 | 362 |
| Contact Us | | 3 | 1 | 2 | 2 | 6 | | | | 339 |
| Irish Vacation Packages | | | | | | 2 | | | | 314 |
| About Us | 10 | | 2 | | | | | 3 | | 308 |
| Travel Bookings | | | | | 5 | | 6 | 8 | 10 | 279 |
| Transport | | | 4 | | | | 5 | | | 231 |
| Weekend Breaks | | | | | | | | | | 202 |

Table 1: Sample GICA scoring spreadsheet for tourism study

Note: The column on the far right of Table 1 is the total score that the classifications received. The other columns with scores in them are just samples of the scores that were given.

Eliminating duplicates

A very important part of the analysis is to eliminate classification duplicates. For example in the classification list in Table 1, there are some very obvious duplicates. These include:

- What to Do and See, and Things to Do & See
- Special Offers, and Deals

In the example in Table 1, Special Offers gets a score of 975 and Deals gets a score of 425, so Special Offers is the most powerful trigger term. What to Do and See received a score of 464, whereas Things to Do & See received a score of 502. These scores are quite close, but based on this information, Things to Do & See just shades it.

Once you decide to eliminate duplicates, you add the score of the classification you are eliminating to its duplicate. Thus, Special Offers now has a score of 1,439. When you're adding the scores together, try to add them on a column by column basis. The reason for this becomes clear when you read the next section.

Low but regular scoring classifications

Sometimes a classification will get chosen by a lot of people but it will get a consistently low score. I found that this often happened with Contact Us. It was one of the most popular choices, but many people gave it a low score. You need to watch out for these sort of classifications, as they may not rise to the top of the scoring, yet may still be very important to include in your top-level classification.

Classification: it's a dirty job but someone's got to do it

Classification ain't easy. But it's vital. I've heard some managers say that because classification is so hard, there must be a software solution. Not so. I heard one manager comment at a conference that classification was simply too difficult. He had come up with a brilliant idea. They didn't do it at all!

If things are easy, then your competitors are definitely doing them. Classification is about creating order. The objective of order is to improve efficiency and productivity. It's about helping you get the right content to the right person, at the right time, at the right cost.

What is an organization if it is not organized? Classification is a fundamental organizing principle for how an organization organizes its content. Yes, classification is hard, so take your time. If you do it well you will have built a solid foundation for a successful website.

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