

INTUIT



turbotax



credit karma



quickbooks



mailchimp

Content site IA

The problem

contentdesign.intuit.com IA was initially laid out in 2018-2019.

Since then, we've added 14 L2 pages to the main nav and 10+ more L3 pages. Categories have become bloated and were never defined.

Hotjar user analysis and site survey verbatim showed us that sensemaking had become more difficult.

"Make it easier to find things that are hidden under each nav item."

"I don't know what Channels means. I always have to click into it to remind myself."

"Differentiating between voice and tone, style, and content patterns can sometimes be a challenge. I find myself clicking into one then the other to try and find what I'm looking for. While the names are descriptive, I still don't have a clear idea what's in each topic."

"I just use search for everything."

How it looks today

IA 2019 - 2022



Project goals

01

Rethink IA to better match our users' mental models

"I think a lot of us approach the content design site with a 'hunt and peck' mentality."

02

Make it easier to find and discover things, no matter how you use the site (search or browse)

"If I'm coming to the Content site, it almost always is with something particular in mind so I go to search to find that thing rather than using the navigation."

03

Make sure our future IA can scale as we grow

Information architecture is not (only) navigation

Part of good IA is making sure the subterranean systems that you don't see are well structured so these things are effective:

- Navigation
- Search
- Filtering
- Related content
- Sorting algorithms
- On-page layout (mini IA)

How we got here

01

Completed an internal inventory (page performance data, hotjar analysis, survey feedback)

02

Did a quick comparative analysis

03

Researched best practices and industry standards

04

Conducted moderated open card sort + interviews with 11 employees

05

Conducted unmoderated hybrid card sort + questionnaire with 13 employees

06

Tested IA structure using Treejack with 64 employees (2 versions)

Tested specific nomenclature using Treejack with 19 employees (2 versions)

Open card sort

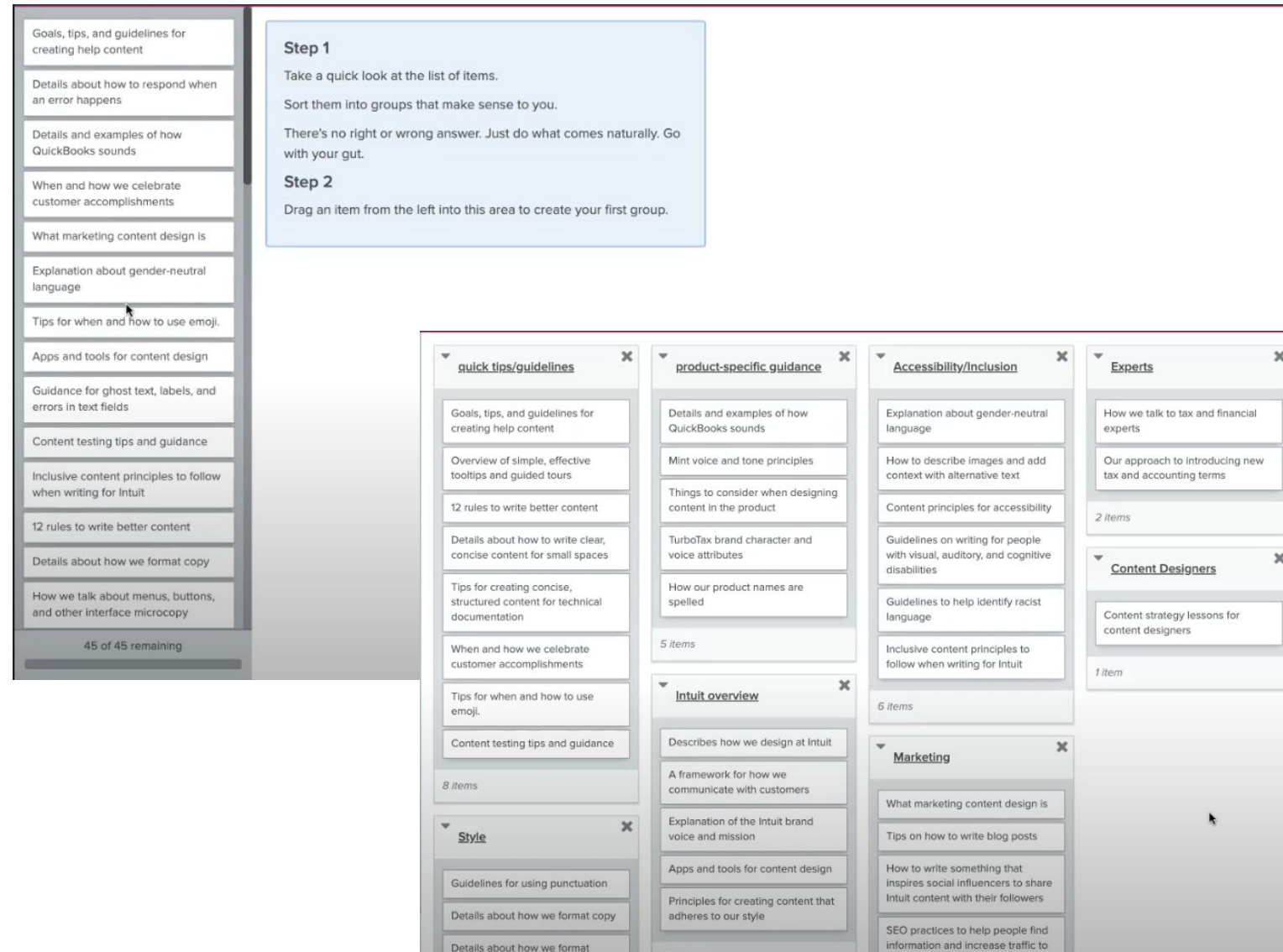
Goal

Understand how users naturally categorize the types of information on contentdesign.intuit.com.

Methodology

We recruited 13 Intuit employees across regions, BUs, tenures, and titles—but most of them (9 of 13) were content people who use the site to do their work.

We moderated each card sort and asked questions at the end of each session.



Card sort results

We didn't expect to get a completely defined IA hierarchy. Instead, we looked for suggestive trends:

Data definition		Interpretation
Similarity score	The number of times two cards appear in the same pile	• Clusters of high similarity scores suggest possible groupings • Individual items with high scores in more than one cluster may have conflicting mental models
Group labels	The names given by users for the groups they create	• Terms that appear repeatedly in labels suggest possible group names
Group definitions	Written or oral explanations describing the rationale for each grouping	• Provide explicit insight into users' mental models

Most folks wanted a place to go first to learn the fundamentals

~70% created a category for the foundational things you need to know to be successful as a content designer.

"It's broad but important topics about content design that could mostly apply almost anywhere you go ... and be successful."

"These seem to be things [that are] just kind of general best practice in content design. Like corporate content agnostic."

"[It's] the idea of having a starting place as a new person or a starting place for design partners, like hey, before you start writing content you should read these first."

"Patterns" is too broad—people think in more specific ways

Not a single person said anything about "patterns" or created a group called Patterns. "Channels" was similar—people couldn't clearly define what a channel was.

Rather, they grouped patterns specific to a place or moments in time.

"I'm going to change my mind. I'm not going to have anything about channels. I don't even know what that is."

"Um, a channel is just something like...um, obviously email is a channel?"

How we communicate with customers is just as important as what

Even though everything we write is *technically* “communicating with customers,” many people created a bucket of guidance for moments that span the customer journey.

“... a section that we need for interacting with customers. It's all writing for customers, essentially. But like how to communicate, and sensitive moments... Security stuff, celebrating certain moments.”

“... errors and difficult messages ... are times when our customers may be out of their normal ... or [they] have to stop and think about something, and that can be something really good like they've hit a milestone.”

“I saw a lot about communicating with customers, so I might put that in one group.”

“[This group is] how we are talking to our customers in very specific scenarios.”

Not everything fits neatly into one category

Some items were hard for people to group because they felt things could belong in multiple categories.

It made us wonder: How might we surface content in multiple places?

"I was a bit confused on putting things under 'Product & UI' and 'Style & grammar,' as a lot of items seemed to fit into both."

"I'm debating...SEO practices could go into marketing and non-product content. There are definitely things that feel like they could be openings to other groupings."

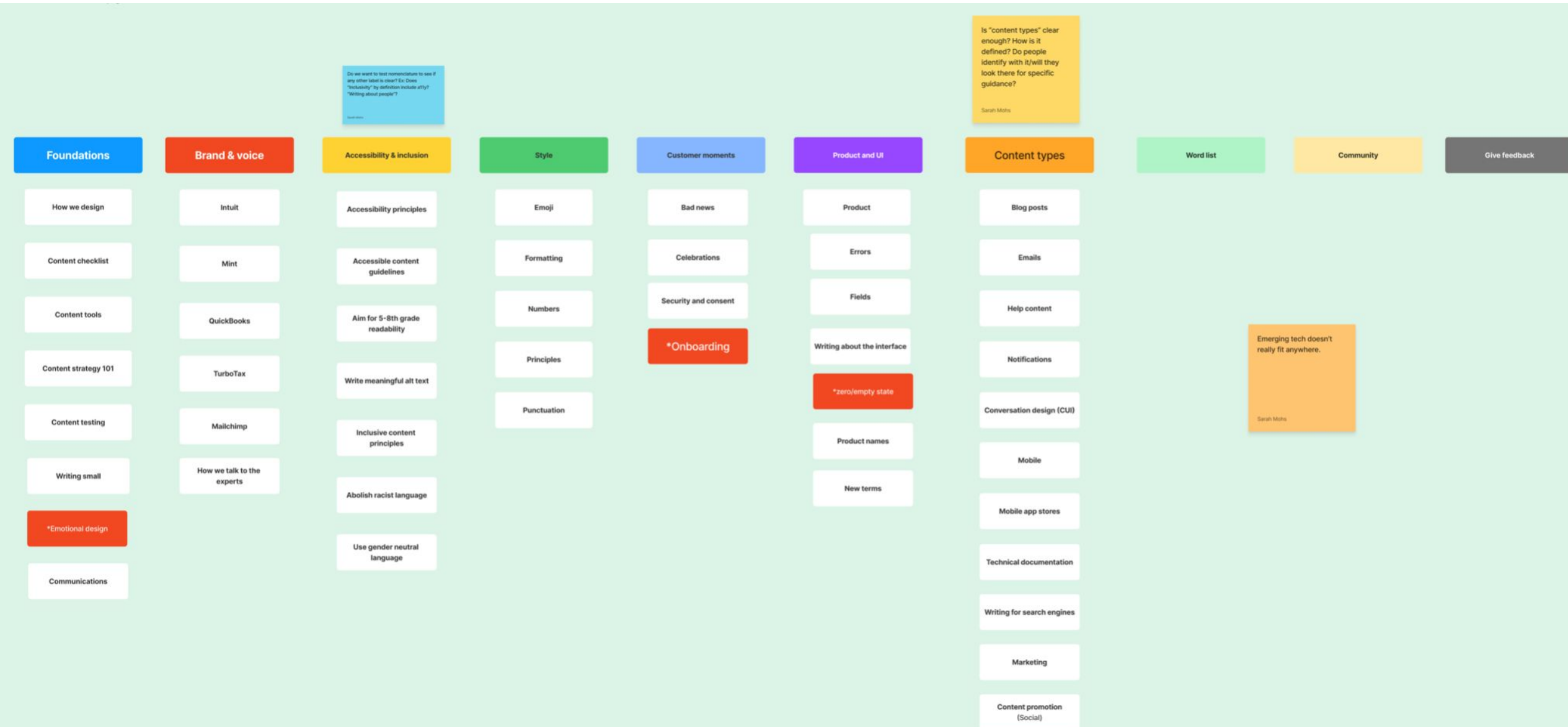
"I sometimes struggled to figure out where to place a few of the cards because Foundations, Style & grammar, and Communicating with customers all felt similar. Basically, the cards that were more about general writing principles could arguably fit into any of those three labels."

Categories that still work: Style, Accessibility, Voice

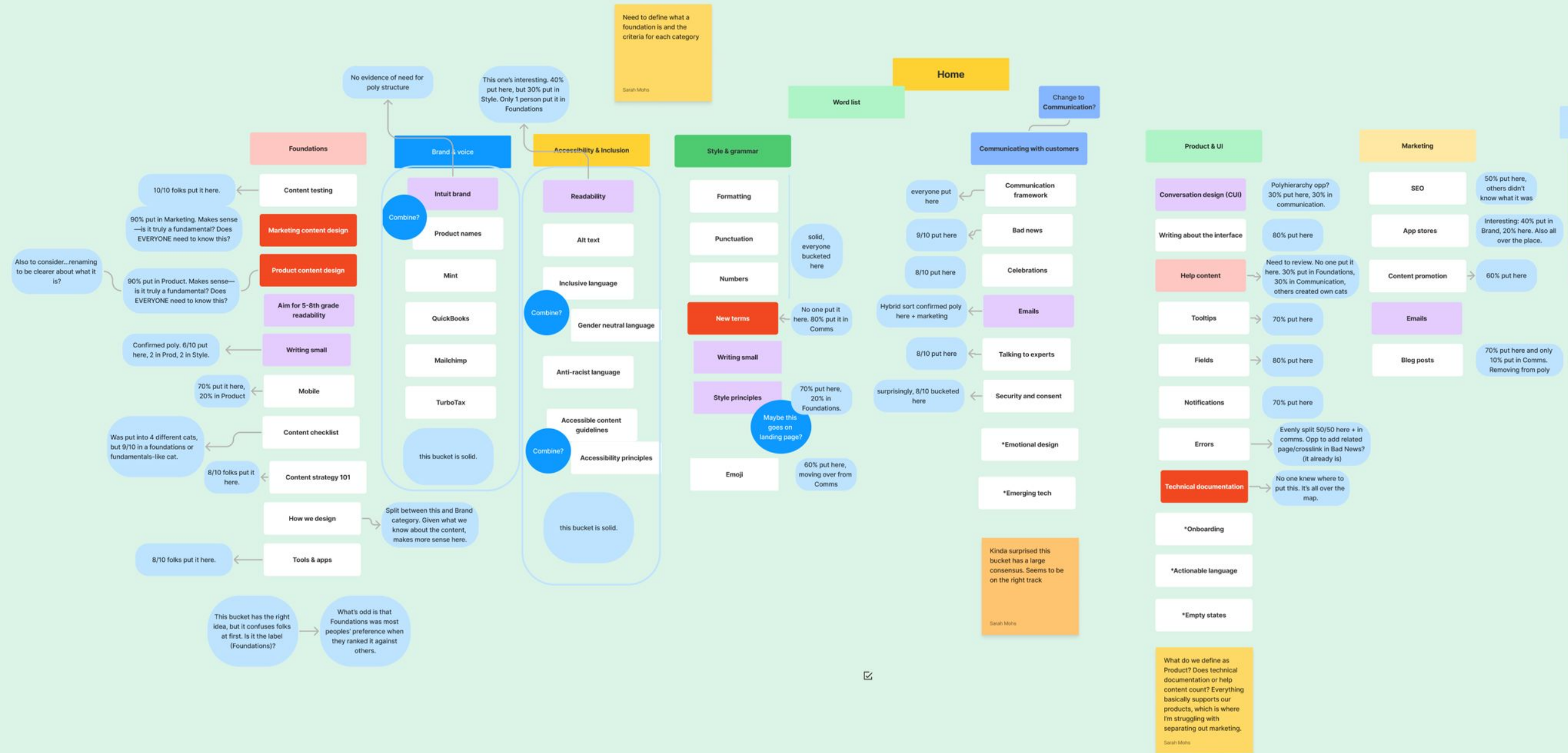
These categories match users' mental models and had the strongest groupings in Optimal Workshop's similarity matrix.



Option 1: Content types + moments



Option 2: Product/marketing



Hybrid card sort

Goals

- Inform decisions around navigation labels
- Understand the mental models around specific terminology and nomenclature
- Uncover the common names/terms that are both clear and specific
- Identify terms that are confusing or require further definition

Methodology

- Based on findings from open card sort, we created labels and asked those same people to categorize cards
- 11 people participated
- Folks could also create their own labels if they wanted
- Asked folks to rank labels for a foundations-like category
- Asked 3 post-exercise questions

Content testing tips and guidance	▼ Brand & voice	▼ Style & grammar
List of notification types and how to write them successfully		
Details about how to write clear, concise content for small spaces	0 items	0 items
Explanation of security and consent content, including levels of consent and when to ask	▼ Marketing	▼ Accessibility & inclusion
A framework for how we communicate with customers		
Goals, tips, and guidelines for creating help content	0 items	0 items
Details about how to respond when an error happens	▼ Foundations	▼ Product & UI
Tips for when and how to use emoji.		
Overview of simple, effective tooltips and guided tours	0 items	0 items
Guidelines on writing for people with visual, auditory, and cognitive disabilities	▼ Communicating with customers	
Mint voice and tone principles		
Explanation about gender-neutral language	0 items	
What marketing content design is		
How to write for chatbots and digital		

TLDR: We're on the right track

Only 3 people created 1 extra category in their exercise.

People were grouping things together in similar ways. This tells us the labels were working relatively well with peoples' mental models/how they understand info on the site.

Guidelines to help identify racist language																			
100																			Content principles for accessibility
100	100																		Guidelines on writing for people with visual, auditory, and cognitive disabilities
100	100	100																	Inclusive content principles to follow when writing for Intuit
100	100	100	100																Explanation about gender-neutral language
72	72	72	72	72															How to describe images and add context with alternative text
0	0	0	0	0	0					27									Guidance for ghost text, labels, and errors in text fields
0	0	0	0	0	0					27	90								Overview of simple, effective tooltips and guided tours
0	0	0	0	0	0					18	81	72							List of notification types and how to write them successfully
0	0	0	0	0	0					9	72	63	72						How we talk about menus, buttons, and other interface microcopy
0	0	0	0	0	0					9	72	63	63	81					Things to consider when designing content in the product
0	0	0	0	0	0					18	63	63	54	45	45				Details about how to respond when an error happens
0	0	0	0	0	0					9	18	18	27	9	9				Explanation of security and consent content, including levels of consent and when to ask
0	0	0	0	0	0					9	9	9	9	9	0				Guidance for delivering a difficult message to customers
0	0	0	0	0	0					9	9	9	9	0	0				A framework for how we communicate with customers
0	0	0	0	0	0					9	9	9	9	9	0				When and how we celebrate customer accomplishments
0	0	0	0	0	0					9	18	18	18	9	9				How we talk to tax and financial experts
0	0	0	0	0	0					9	18	18	18	9	18				Our approach to introducing new tax and accounting terms
0	0	0	0	0	0					18	27	27	27	9	9				Best practices for writing emails
0	0	0	0	0	0					18	54	45	54	36	45				How to write for chatbots and digital assistants
0	0	0	0	0	0					18	18	18	18	9	9				Goals, tips, and guidelines for creating help content
0	0	0	0	0	0					9	18	18	36	27	18				Tips for creating concise, structured content for technical documentation
0	0	0	0	0	0					18	36	36	27	27	36				Overview of writing mobile-first content
0	0	0	0	0	0					18	18	27	9	9	18				Content testing tips and guidance
0	0	0	0	0	0					9	18	0	0	9	0				12 rules to write better content
0	0	0	0	0	0					9	18	27	9	18	27				Content strategy lessons for content designers
0	0	0	0	0	0					9	27	36	18	18	27				Apps and tools for content design
0	0	0	0	0	0					9	18	27	27	36	36				Details about how to write clear, concise content for small spaces
0	0	0	0	0	0					9	9	9	0	9	9				Describes how we design at Intuit
0	0	0	0	0	0					0	0	0	0	0	0				Explanation of the Intuit brand voice and mission
0	0	0	0	0	0					0	0	0	0	0	0				Details and examples of how QuickBooks sounds
0	0	0	0	0	0					9	9	9	9	9	9				Mint voice and tone principles
0	0	0	0	0	0					9	9	9	9	9	9				TurboTax brand character and voice attributes
9	9	9	9	9	9					18	18	18	18	18	18				Tips to ensure content in the iOS and Android app stores meet our standards.
0	0	0	0	0	0					9	9	9	0	0	0				How to write something that inspires social influencers to share Intuit content with their followers
0	0	0	0	0	0					9	9	9	0	0	0				What marketing content design is
0	0	0	0	0	0					18	18	18	18	9	9				Tips on how to write blog posts
0	0	0	0	0	0					9	9	9	0	0	0				SEO practices to help people find information and increase traffic to Intuit websites
45	45	45	45	45	45					18	0	0	0	0	0				Why we target 5th-8th grade readability
0	0	0	0	0	0					0	0	0	0	9	18				Principles for creating content that adheres to our style
0	0	0	0	0	0					9	9	9	18	27	9				Details about how we format copy
0	0	0	0	0	0					9	9	9	18	27	9				Details about how we format numbers, currency, decimals, time, etc.
0	0	0	0	0	0					9	9	9	18	27	9				Guidelines for using punctuation
0	0	0	0	0	0					9	9	9	18	27	9				Tips for when and how to use emoji.
0	0	0	0	0	0					18	27	18	27	27	36				How our product names are spelled

“Foundations” is the right idea conceptually, but takes getting used to

What people did and what people said were slightly different. While some commented that Foundations was confusing, they grouped a lot of the cards together similarly and were able to accurately define it in a post-task question.

72	Content testing tips and guidance				
63	81	12 rules to write better content			
45	72	72	Content strategy lessons for content designers		
45	72	72	81	Apps and tools for content design	
36	63	45	72	63	Details about how to write clear, concise content
18	36	27	45	36	36 Describes how we design at Intuit

“I put things there that either applied to all types of content, or that new hires should know about.”

“I felt this was for content design fundamentals that would apply as much outside of Intuit as inside”

“Foundations, to me, was more about the building blocks of content design. Overviews of principles like writing small or a place to learn more about content design.”

“Foundations felt like foundations of writing, grammar, composition, etc.”

Style works as a group

The more “prescriptive” topics were consistently grouped together.

Seeing how folks bucketed squishier things (new terms, emoji) was really helpful and informed decisions for treejack testing.



Customer group makes sense, but does the label?

Like Foundations, this grouping had a high similarity score, suggesting that the category fundamentally makes sense.

But does the label work? Can we make it more conversational? We tossed around a lot of ideas and decided to test 2 in later tests.

54	Explanation of security and consent content, including levels of consent and when to ask						
45	72	Guidance for delivering a difficult message to customers					
45	72	90	A framework for how we communicate with customers				
36	63	90	81	When and how we celebrate customer accomplishments			
45	63	63	72	54	How we talk to tax and financial experts		
36	63	63	72	54	81	Our approach to introducing new tax and accounting terms	
36	54	36	36	27	45	45	Best practices for writing emails

“Communicating with customers’ was the one I struggled with most. I eventually defined it to myself as ‘things to think about when communicating to particular groups of people or in particular emotional contexts.’ But my initial thought was that everything we do is related to communicating with customers.”

Brand & voice & tone

The only difference between these categories was including **Product names**. We decided to test nomenclature in the treejack.

Accessibility & inclusion

Somewhat surprisingly, **Readability** was sorted into many different groups.

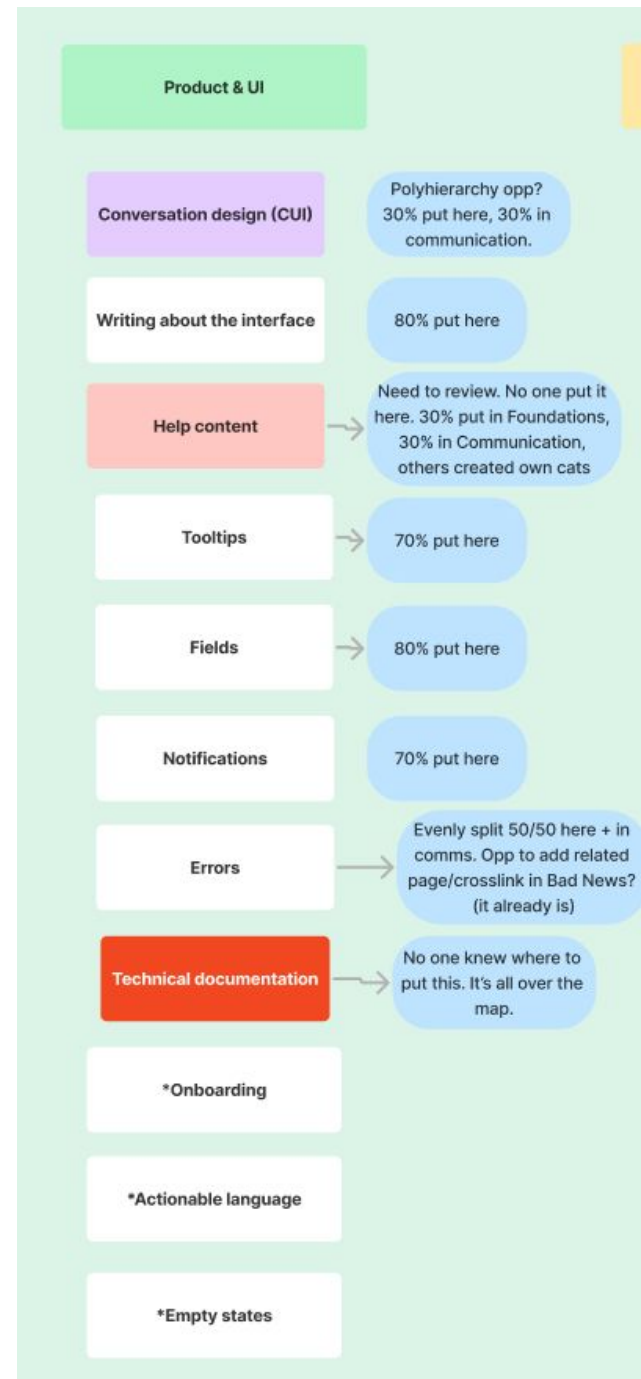
We wanted to combine some pages (gender neutral language and inclusive language) and decided to test that in treejack.

Product & UI:

A mixed bag

The hybrid card sort confirmed some assumptions. There were also some helpful surprises in how **Help**, **Errors**, and **Technical documentation** were categorized.

For example, the **Technical documentation** page isn't labeled clearly. It's actually more about how to write content for a developer audience. It doesn't belong here.



Treejack tests

Goal

Evaluate the findability and discoverability of content

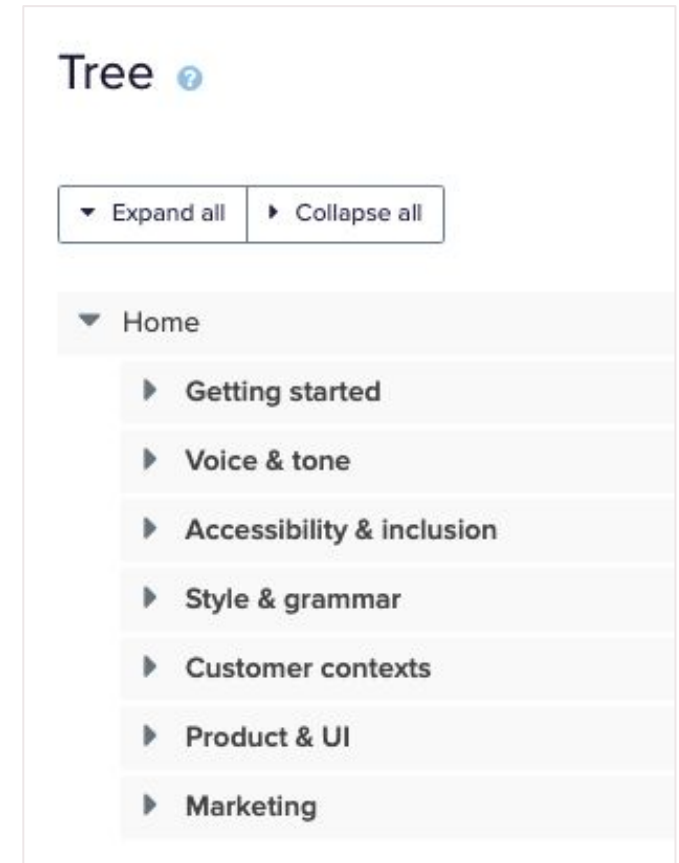
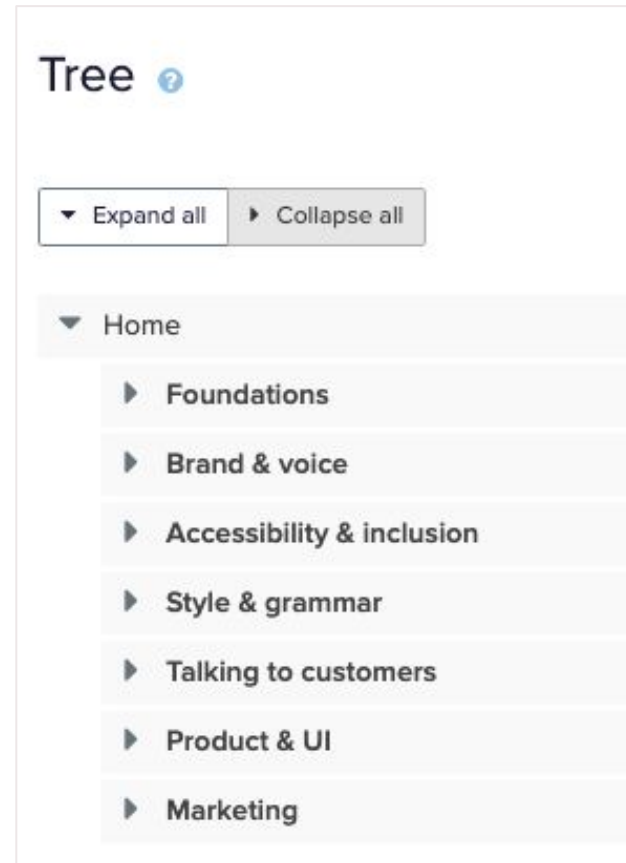
Methodology

Users were asked to complete 10 tasks that involved finding specific destinations within the proposed structure. They clicked through a plain-text taxonomy tree so not to be influenced by any navigational aids or visual design.

We had 2 versions of the test with slightly different labels and structures. Both had the exact same tasks.

- Test 1 was carried out by 37 internal content folks who spanned a breadth of tenures, titles, and BUs.
- Test 2 was carried out by 26 internal content folks who spanned a breadth of tenures, titles, and BUs.

64 participants allowed us to gather enough information to identify significant trends within the results.



What we tested for

Directness

The percentage of users who went directly to the correct answer

Success

The percentage of users who ended up at a correct answer, with some backtracking along the way

First click

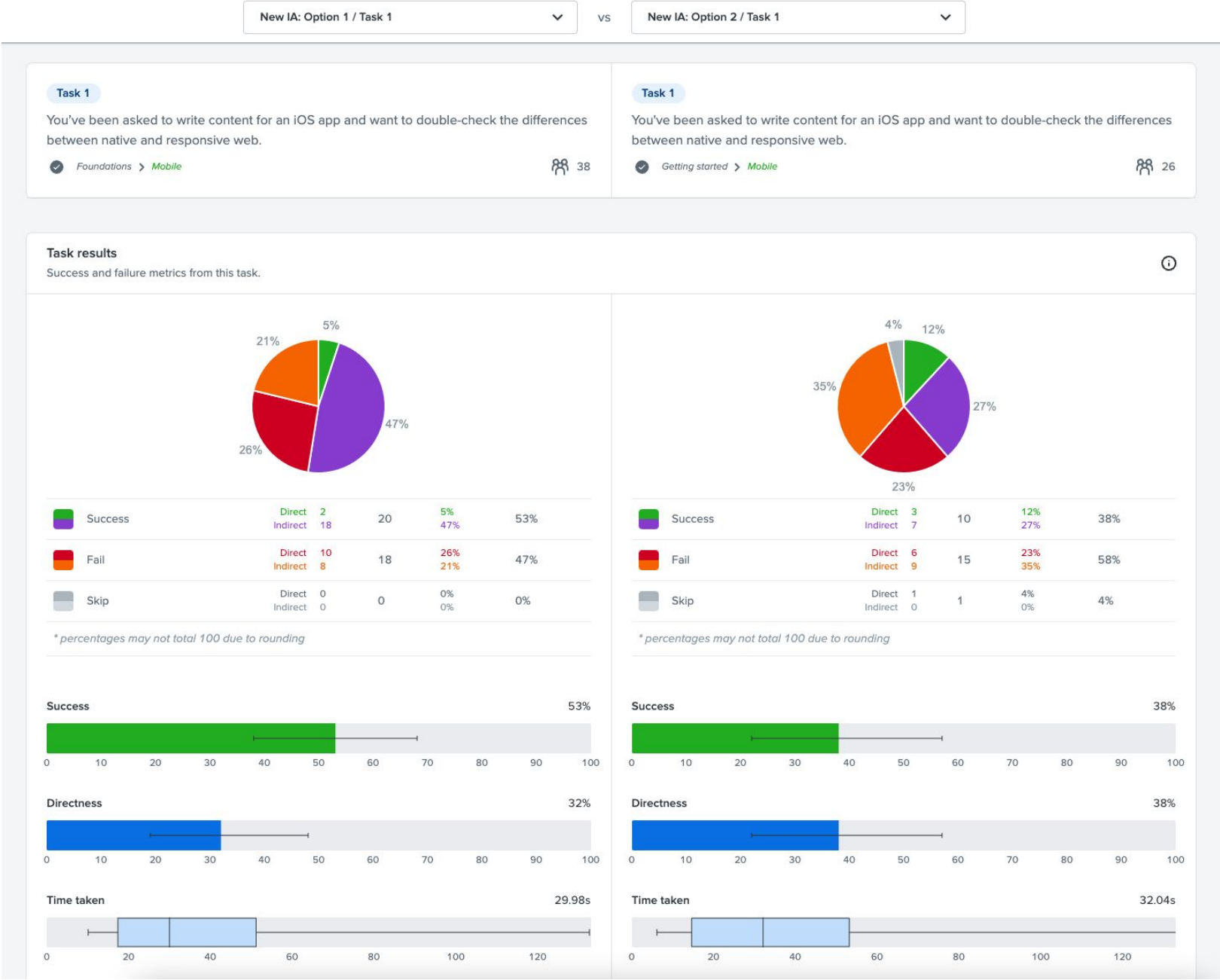
Measures the category people selected first, which is a good indicator of the strength of category names

Task 1

You've been asked to write content for an iOS app and want to double-check the differences between native and responsive web.

Test 1 was more successful by 15 points.

But why such a high failure rate?



Task 1

You've been asked to write content for an iOS app and want to double-check the differences between native and responsive web.

First click data highlighted the issue:

Mobile as a foundation doesn't match peoples' mental models.

Recommendation to move to Product & UI.

1. You've been asked to write content for an iOS app and want to double-check the differences between native and responsive web.

 Add a note

Label	Visited first	Visited during
Foundations	8%	71%
Brand & voice	0%	16%
Accessibility & inclusion	0%	5%
Style & grammar	3%	21%
Talking to customers	3%	16%
Product & UI	87%	89%
Marketing	0%	8%

1. You've been asked to write content for an iOS app and want to double-check the differences between native and responsive web.

 1 note 

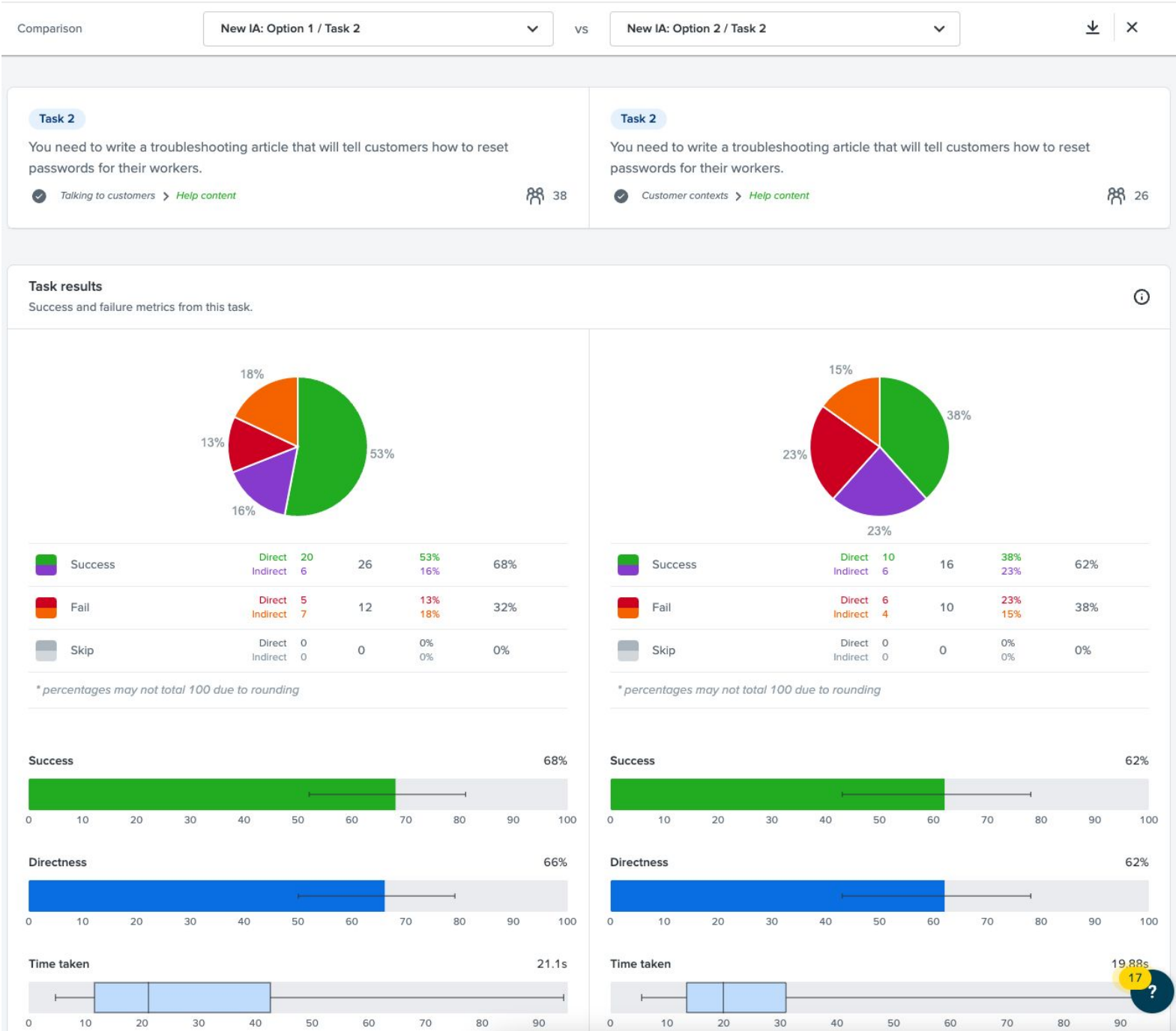
Label	Visited first	Visited during
Getting started	15%	46%
Voice & tone	4%	15%
Accessibility & inclusion	0%	15%
Style & grammar	0%	23%
Customer contexts	12%	38%
Product & UI	62%	81%
Marketing	4%	4%

Task 2

You need to write a troubleshooting article that will tell customers how to reset passwords for their workers.

This was a tricky one in hybrid sort. 30% put in **Foundations**, 30% in **Communicating with customers**, others created their own categories.

However, the high success and directness rate of both treejack tests suggests this is in the right group.

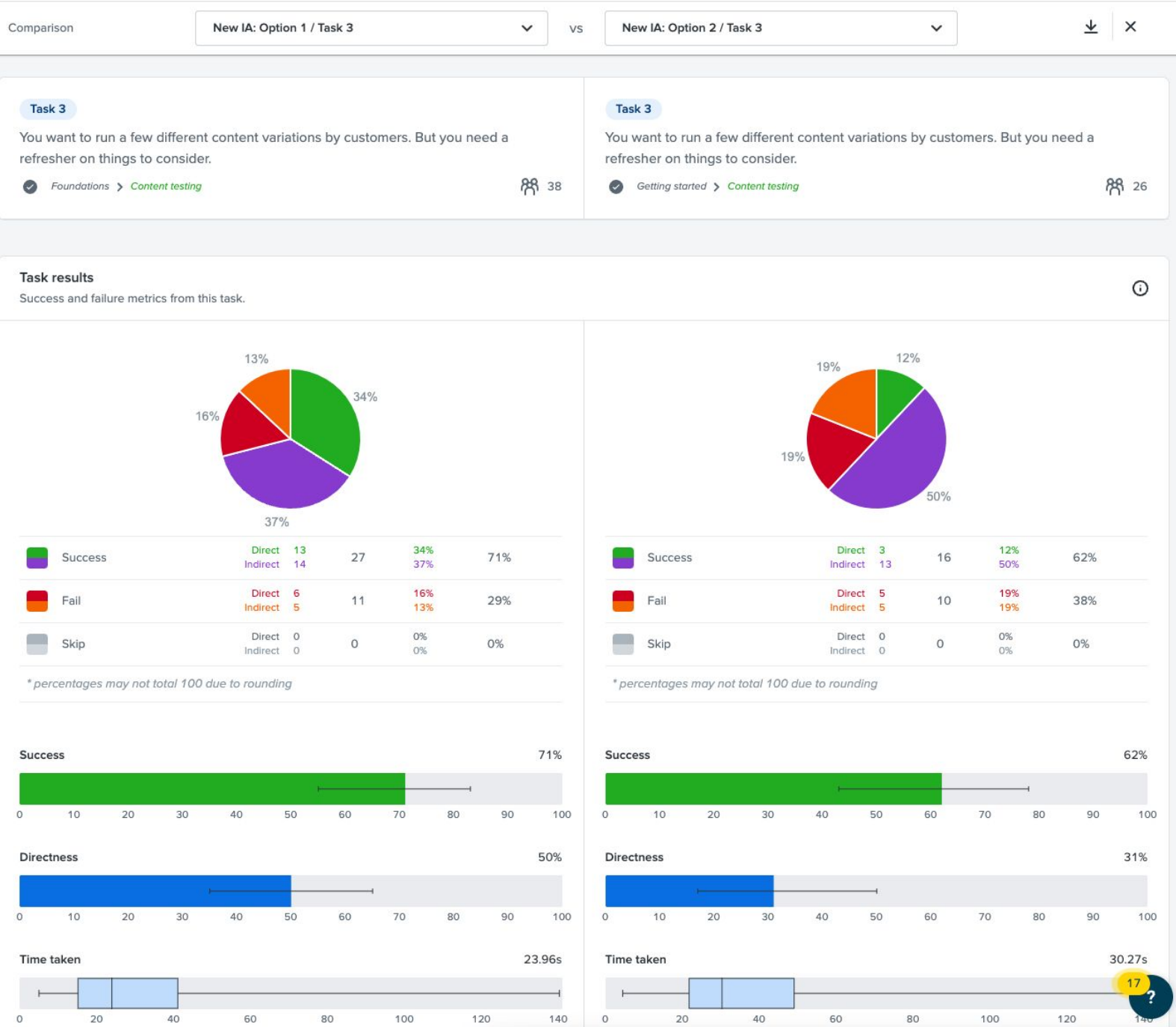


Task 3

You want to run a few different content variations by customers. But you need a refresher on things to consider.

Confirms hypothesis that content testing is a foundation/necessary to get started.

Foundations had a much higher directness (50% vs 31%)



Task 3

You want to run a few different content variations by customers. But you need a refresher on things to consider.

First click data supports hypothesis that **Content testing** belongs in a foundation-like group.

3. You want to run a few different content variations by customers. But you need a refresher on things to consider.

 Add a note

Label	Visited first	Visited during
Foundations	39%	76%
Brand & voice	3%	5%
Accessibility & inclusion	5%	8%
Style & grammar	0%	5%
Talking to customers	39%	45%
Product & UI	11%	13%
Marketing	3%	5%

3. You want to run a few different content variations by customers. But you need a refresher on things to consider.

 Add a note

Label	Visited first	Visited during
Getting started	15%	69%
Voice & tone	12%	31%
Accessibility & inclusion	0%	15%
Style & grammar	4%	19%
Customer contexts	54%	69%
Product & UI	12%	46%
Marketing	4%	12%

Task 4

You need to double-check if it's Credit Karma or CreditKarma.

Product names had a 6% higher success metric when placed under **Style & grammar** instead of **Brand & voice**—but both still had high success rates.

Comparison

New IA: Option 1 / Task 4

vs

New IA: Option 2 / Task 4



Task 4

You need to double-check if it's Credit Karma or CreditKarma.

Brand & voice > Product names

38

Task 4

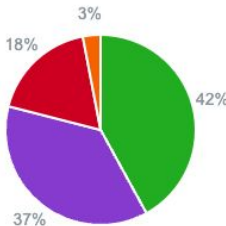
You need to double-check if it's Credit Karma or CreditKarma.

Style & grammar > Product names

26

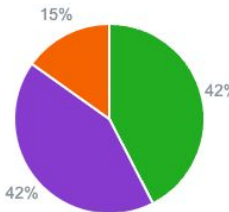
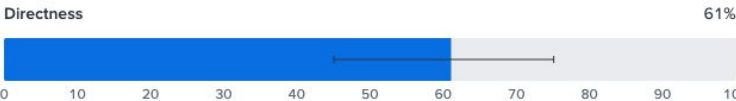
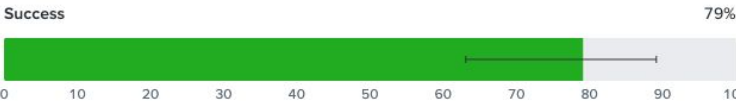
Task results

Success and failure metrics from this task.



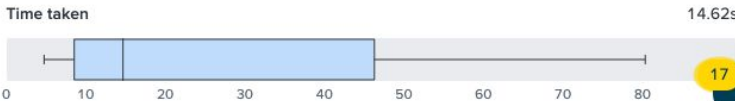
Success	Direct	16	30	42%	79%
	Indirect	14		37%	
Fail	Direct	7	8	18%	21%
	Indirect	1		3%	
Skip	Direct	0	0	0%	0%
	Indirect	0		0%	

* percentages may not total 100 due to rounding



Success	Direct	11	22	42%	85%
	Indirect	11		42%	
Fail	Direct	0	4	0%	15%
	Indirect	4		15%	
Skip	Direct	0	0	0%	0%
	Indirect	0		0%	

* percentages may not total 100 due to rounding



Task 4

You need to double-check if it's Credit Karma or CreditKarma.

First click data points to **Style & grammar**.

After assessing the content on the **Product names** page, we decided to go with this grouping.

4. You need to double-check if it's Credit Karma or CreditKarma.

Add a note

Label	Visited first	Visited during
Foundations	8%	13%
Brand & voice	45%	82%
Accessibility & inclusion	0%	3%
Style & grammar	29%	42%
Talking to customers	3%	5%
Product & UI	8%	18%
Marketing	8%	13%

4. You need to double-check if it's Credit Karma or CreditKarma.

1 note

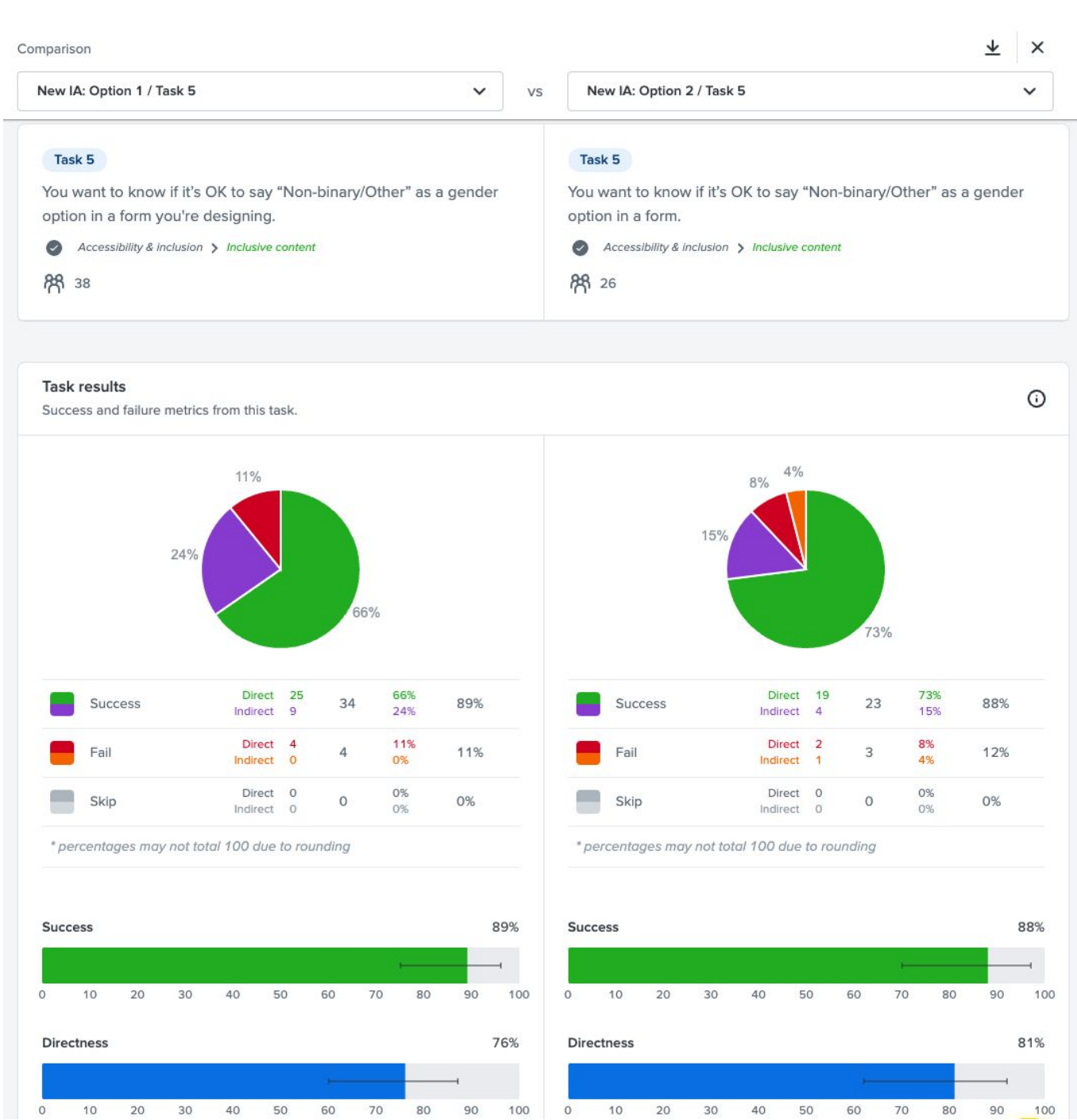
Label	Visited first	Visited during
Getting started	0%	19%
Voice & tone	0%	23%
Accessibility & inclusion	0%	4%
Style & grammar	58%	92%
Customer contexts	0%	12%
Product & UI	31%	46%
Marketing	12%	46%

Task 5

You want to know if it's OK to say "Non-binary/Other" as a gender option in a form.

Our hypothesis: Combining the gender-neutral page with the inclusive language page won't impede findability.

The success of this task in both tests supports our hypothesis.



Task 5

You want to know if it's OK to say "Non-binary/Other" as a gender option in a form.

First click data supports this grouping as well.

5. You want to know if it's OK to say "Non-binary/Other" as a gender option in a form you're designing. skipped by 0% of participants Add a note

Label	Visited first	Visited during
Foundations	3%	8%
Brand & voice	5%	8%
Accessibility & inclusion	76%	92%
Style & grammar	8%	8%
Talking to customers	8%	8%
Product & UI	0%	0%
Marketing	0%	0%

5. You want to know if it's OK to say "Non-binary/Other" as a gender option in a form. 1 note

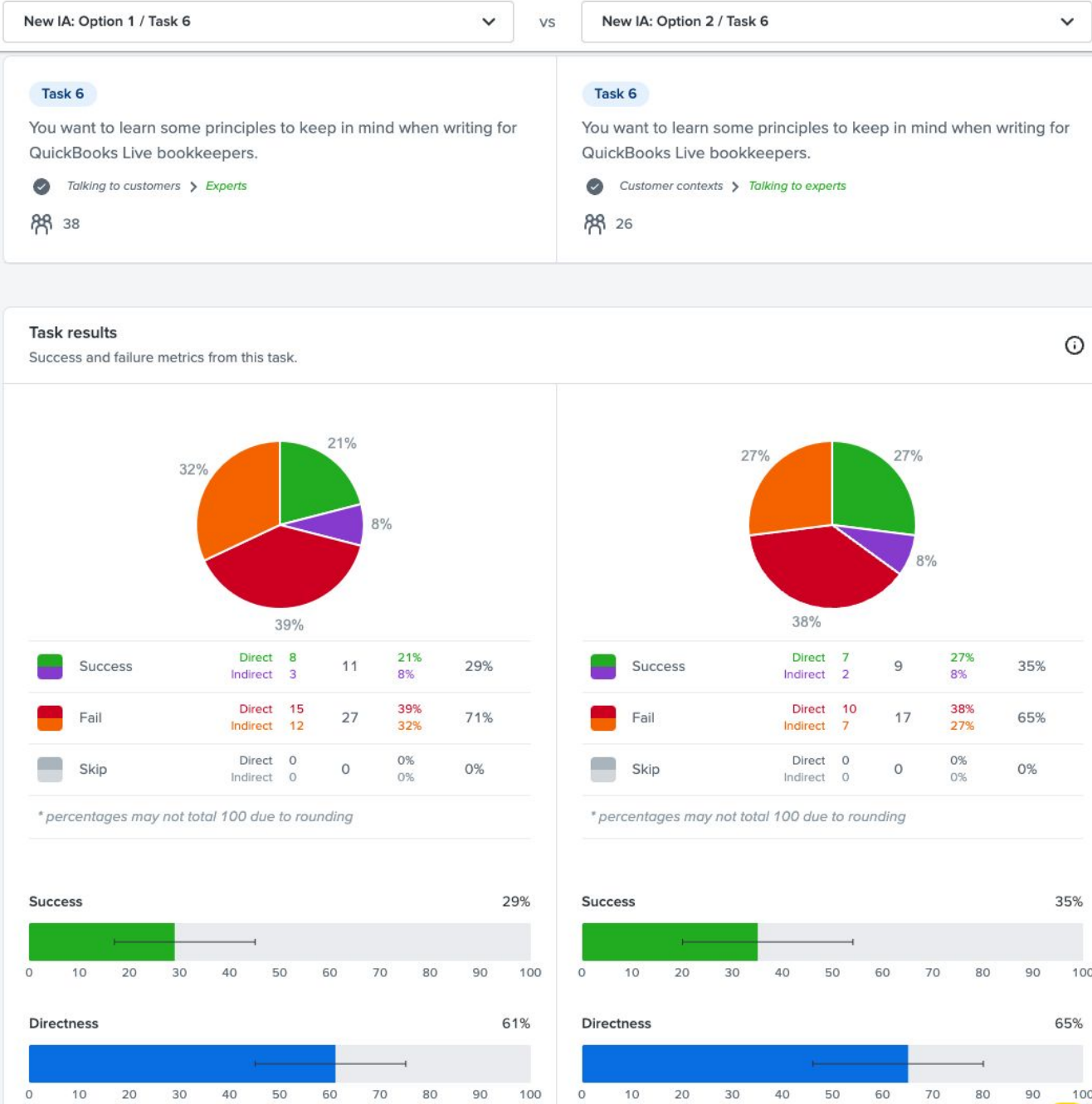
Label	Visited first	Visited during
Getting started	0%	0%
Voice & tone	15%	15%
Accessibility & inclusion	73%	88%
Style & grammar	8%	12%
Customer contexts	0%	0%
Product & UI	4%	8%
Marketing	0%	0%

Task 6

You want to learn some principles to keep in mind when writing for QuickBooks Live bookkeepers.

Folks struggled with this task. Why?

People may not know that we refer to QuickBooks Live bookkeepers as experts.



Task 6

You want to learn some principles to keep in mind when writing for QuickBooks Live bookkeepers.

Participants also may have been keyword matching “QuickBooks,” as evidenced by first click data.

6. You want to learn some principles to keep in mind when writing for QuickBooks Live bookkeepers.

 Add a note

Label	Visited first	Visited during
Foundations	8%	29%
Brand & voice	45%	74%
Accessibility & inclusion	0%	8%
Style & grammar	3%	18%
Talking to customers	34%	50%
Product & UI	5%	29%
Marketing	5%	16%

6. You want to learn some principles to keep in mind when writing for QuickBooks Live bookkeepers.

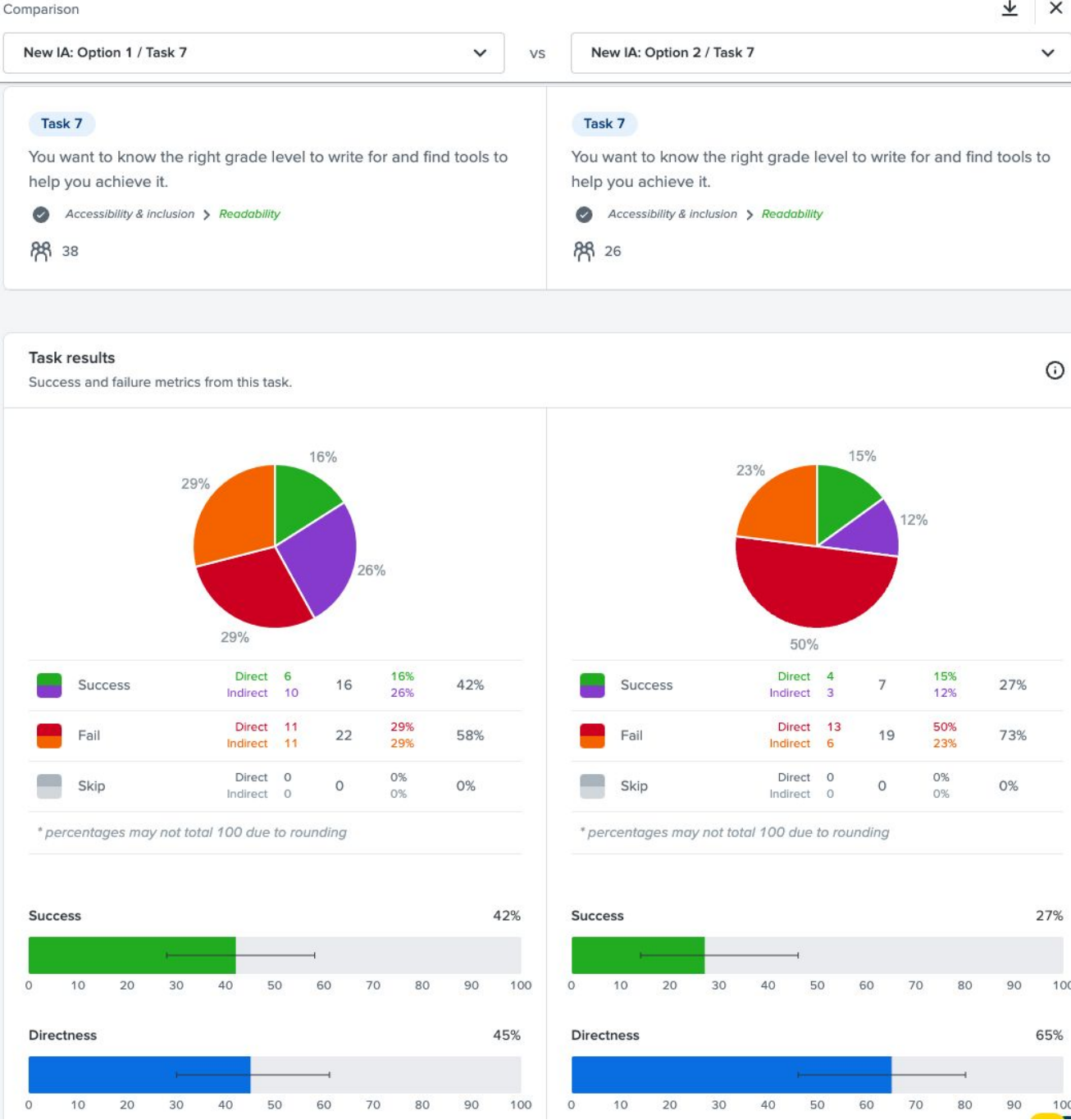
 1 note 

Label	Visited first	Visited during
Getting started	4%	4%
Voice & tone	42%	62%
Accessibility & inclusion	0%	0%
Style & grammar	15%	27%
Customer contexts	31%	35%
Product & UI	8%	19%
Marketing	0%	0%

Task 7

You want to know the right grade level to write for and find tools to help you achieve it.

Participants put **Readability** in a variety of places. It's unclear why these 2 tests differed so much in success and directness, since they're the exact same task.



Task 7

You want to know the right grade level to write for and find tools to help you achieve it.

Is readability a foundation, or were folks keyword matching “tools”? Did people put it under Style because it’s enmeshed with our style principles?

It was grouped most with **Accessibility** in card sorts.

7. You want to know the right grade level to write for and find tools to help you achieve it.

Sorted by % of participants

1 note

Label	Visited first	Visited during
Getting started	27%	35%
Voice & tone	27%	27%
Accessibility & inclusion	19%	35%
Style & grammar	23%	35%
Customer contexts	4%	8%
Product & UI	0%	0%
Marketing	0%	0%

7. You want to know the right grade level to write for and find tools to help you achieve it.

Add a note

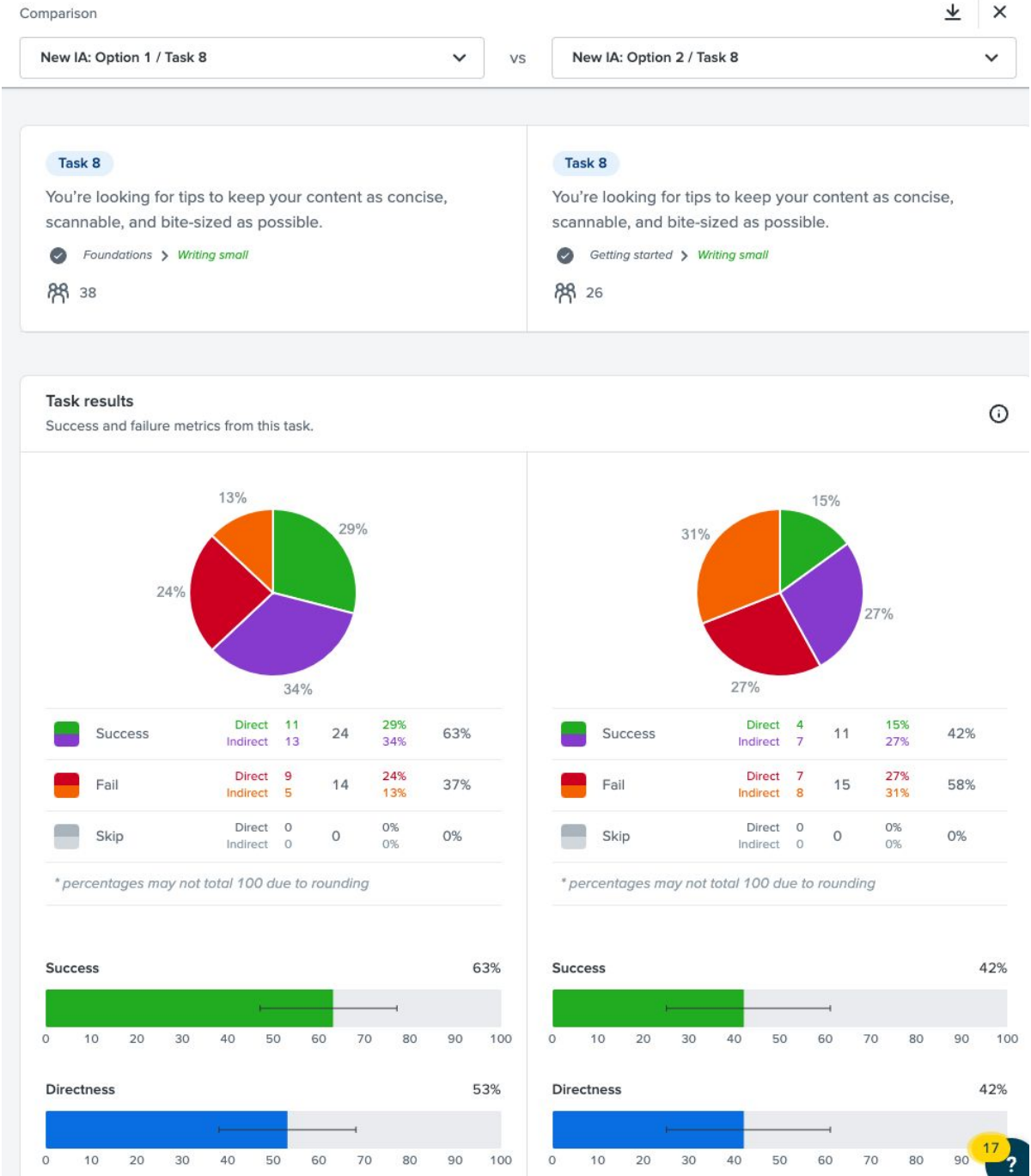
Label	Visited first	Visited during
Foundations	24%	45%
Brand & voice	11%	34%
Accessibility & inclusion	16%	47%
Style & grammar	42%	55%
Talking to customers	8%	32%
Product & UI	0%	5%
Marketing	0%	8%

Task 8

You're looking for tips to keep your content as concise, scannable, and bite-sized as possible.

Writing small makes more sense as a fundamental thing you need to know to design well, rather than as something you need to "get started."

The success rate highlights the big difference between these 2 labels.



Success

Direct

4

11

15%

42%

Indirect

7

27%

Fail

Direct

7

15

27%

58%

Indirect

8

31%

Skip

Direct

0

0

0%

0%

Indirect

0

0%

* percentages may not total 100 due to rounding

Success

42%

Directness

42%

17?

Task 8

You're looking for tips to keep your content as concise, scannable, and bite-sized as possible.

Half or almost half of participants visited **Style & grammar** first.

It's also where it currently lives on the site. Does that play a part?

8. You're looking for tips to keep your content as concise, scannable, and bite-sized as possible.

Add a note

Label	Visited first	Visited during
Foundations	32%	68%
Brand & voice	3%	18%
Accessibility & inclusion	0%	3%
Style & grammar	50%	53%
Talking to customers	5%	13%
Product & UI	3%	16%
Marketing	8%	16%

8. You're looking for tips to keep your content as concise, scannable, and bite-sized as possible.

Add a note

Label	Visited first	Visited during
Getting started	15%	42%
Voice & tone	19%	35%
Accessibility & inclusion	8%	19%
Style & grammar	46%	77%
Customer contexts	4%	12%
Product & UI	8%	23%
Marketing	0%	0%

Task 9

You've been asked to write something for the TurboTax Digital Assistant and need details about good and bad chatbot prompts.

Conversation design (CUI) performed well in both tests. This suggests it's in the right category.

New IA: Option 1 / Task 9

vs

New IA: Option 2 / Task 9

Task 9

You've been asked to write something for the TurboTax Digital Assistant and need details about good and bad chatbot prompts.

✓ Product & UI > Conversation design (CUI)

38

Task 9

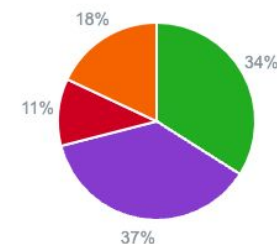
You've been asked to write something for the TurboTax Digital Assistant and need details about good and bad chatbot prompts.

✓ Product & UI > Conversation design (CUI)

26

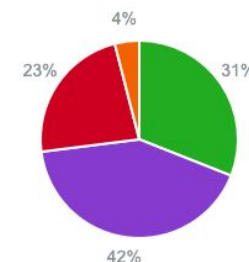
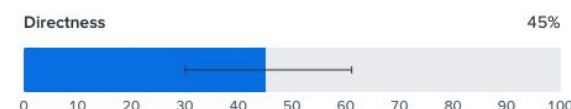
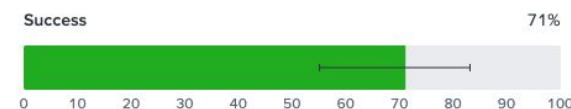
Task results

Success and failure metrics from this task.



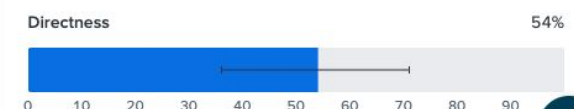
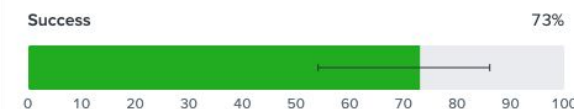
Success	Direct	13	27	34%	71%
	Indirect	14		37%	
Fail	Direct	4	11	11%	29%
	Indirect	7		18%	
Skip	Direct	0	0	0%	0%
	Indirect	0		0%	

* percentages may not total 100 due to rounding



Success	Direct	8	19	31%	73%
	Indirect	11		42%	
Fail	Direct	6	7	23%	27%
	Indirect	1		4%	
Skip	Direct	0	0	0%	0%
	Indirect	0		0%	

* percentages may not total 100 due to rounding



Task 9

You've been asked to write something for the TurboTax Digital Assistant and need details about good and bad chatbot prompts.

First click data supports our hypothesis, but the **Customer** label is a close second.

9. You've been asked to write something for the TurboTax Digital Assistant and need details about good and bad chatbot prompts.

Add a note

Label	Visited first	Visited during
Foundations	13%	24%
Brand & voice	8%	21%
Accessibility & inclusion	5%	11%
Style & grammar	3%	21%
Talking to customers	29%	42%
Product & UI	42%	82%
Marketing	0%	11%

9. You've been asked to write something for the TurboTax Digital Assistant and need details about good and bad chatbot prompts.

Add a note

Label	Visited first	Visited during
Getting started	8%	15%
Voice & tone	12%	31%
Accessibility & inclusion	0%	0%
Style & grammar	8%	15%
Customer contexts	35%	46%
Product & UI	38%	77%
Marketing	0%	0%

Task 10

Your PM asked you write an email to send to customers who experienced a technical issue. You're looking for guidance on how to measure success.

Talking to customers seems to be the clearer label than Customer contexts—by 11%.

Directness was low for both, however. And failure rate is high. Why?

New IA: Option 1 / Task 10

vs

New IA: Option 2 / Task 10

Task 10

Your PM asked you write an email to send to customers who experienced a technical issue. You're looking for guidance on how to measure success.

✓ Talking to customers > Emails

38

Task 10

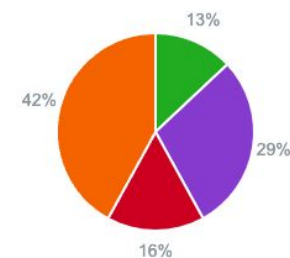
Your PM asked you write an email to send to customers who experienced a technical issue. You're looking for guidance on how to measure success.

✓ Customer contexts > Emails

26

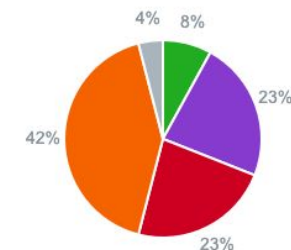
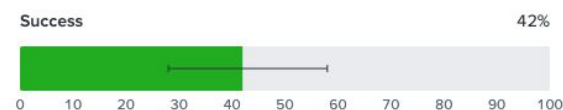
Task results

Success and failure metrics from this task.



Success	Direct	5	16	13%	42%
	Indirect	11		29%	
Fail	Direct	6	22	16%	58%
	Indirect	16		42%	
Skip	Direct	0	0	0%	0%
	Indirect	0		0%	

* percentages may not total 100 due to rounding



Success	Direct	2	8	8%	31%
	Indirect	6		23%	
Fail	Direct	6	17	23%	65%
	Indirect	11		42%	
Skip	Direct	1	1	4%	4%
	Indirect	0		0%	

* percentages may not total 100 due to rounding



Task 10

Your PM asked you write an email to send to customers who experienced a technical issue. You're looking for guidance on how to measure success.

People clicked around until they found something that seemed to fit.

First click data paired with path data and site analytics suggests email is not a familiar task.

10. Your PM asked you write an email to send to customers who experienced a technical issue. You're looking for guidance on how to measure success.

 Add a note

Label	Visited first	Visited during
Foundations	29%	58%
Brand & voice	3%	21%
Accessibility & inclusion	0%	8%
Style & grammar	3%	16%
Talking to customers	45%	82%
Product & UI	11%	26%
Marketing	11%	29%

10. Your PM asked you write an email to send to customers who experienced a technical issue. You're looking for guidance on how to measure success.

 Add a note

Label	Visited first	Visited during
Getting started	23%	50%
Voice & tone	0%	12%
Accessibility & inclusion	0%	8%
Style & grammar	0%	15%
Customer contexts	35%	65%
Product & UI	23%	46%
Marketing	15%	38%

Bonus treejack!

Goal

Test nomenclature around **Style & grammar**

Methodology

Users were asked to complete 3 tasks that involved navigating to things that live under **Style**.

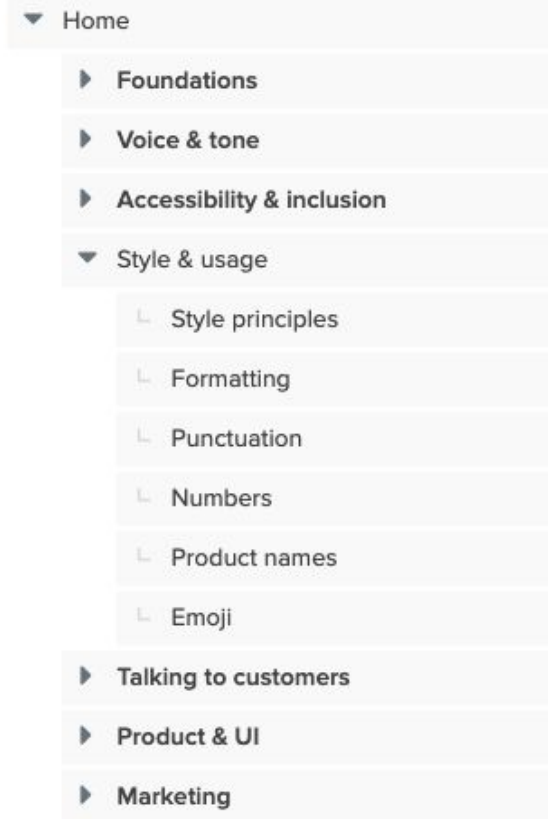
We had 2 versions of the test with slightly different labels for **Style**. Both had the exact same tasks.

- Test 1 had 10 participants, mainly internal content folks who spanned a breadth of tenures, titles, and BUs.
- Test 2 had 10 participants, mainly internal content folks who spanned a breadth of tenures, titles, and BUs.

We asked a post-test question asking them to select a label that was clearest.

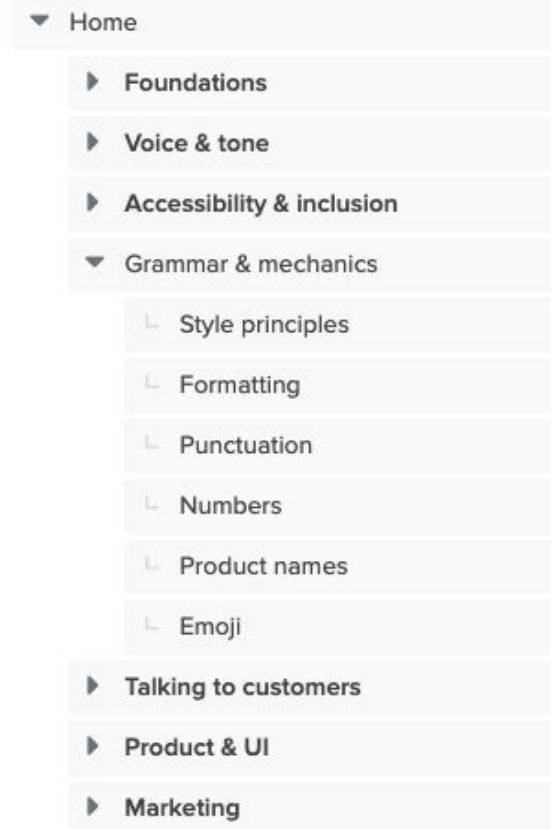
Tree ?

▼ Expand all ▶ Collapse all



Tree ?

▼ Expand all ▶ Collapse all



Overview

Style & usage tested over 2x better than Grammar & mechanics for a task about formatting text.

When presented with a list of options, exactly half of participants (50%) felt **Style & usage** best fit that particular group of guidance.

Question 1

Add a note

Hide responses with no data
10 of 10 participants answered

Radio button with other option

- Let's say you have a group of guidance that includes:
- When and how we use emoji
 - Formatting (capitalization, bold, links, etc.)
 - Numbers (currency, decimals, time, etc.)
 - Punctuation
 - How product names are spelled
 - Our style principles (simple tenses, active voice, etc.)

Which label fits the best to you?

Answer	Percentage			Frequency
Style & grammar		30%	3	Filter
Style & usage		40%	4	Filter
Grammar & mechanics		0%	0	Filter
Style		20%	2	Filter
Other		10%	1	Filter

Hide Responses

Participant 5 Formatting & Basic Principles

Question 1

Add a note

Hide responses with no data
10 of 10 participants answered

Radio button with other option

- Let's say you have a group of guidance that includes:
- When and how we use emoji
 - Formatting (capitalization, bold, links, etc.)
 - Numbers (currency, decimals, time, etc.)
 - Punctuation
 - How product names are spelled
 - Our style principles (simple tenses, active voice, etc.)

Which label fits the best to you?

Answer	Percentage			Frequency
Style & grammar		20%	2	Filter
Style & usage		60%	6	Filter
Grammar & mechanics		0%	0	Filter
Style		10%	1	Filter
Other		10%	1	Filter

Hide Responses

Participant 3 Style & mechanics

Why did you choose that label?

It's the closest to the words I'd use to think about these categories. "How do I style/use... emojis/text/numbers/product names/my writing?"

Style by itself seems to broad. Grammar is too narrow and less friendly to folks who aren't dedicated word nerds.

Seems like the right balance of broad and specific. I think of grammar as something that we'd look at other sources to get right, not our Intuit specific guidance. Style is like the specific ways we choose to follow various grammar guidance.

I feel like grammar is the wrong approach. We're not setting standards for grammar. We are choosing a style of grammar that we deem as the standard among our own and how we think it fits the best. I feel like style and usage are subsets of grammar.

Those two categories cover all of the use cases on the list.

Grammar is too limiting. I feel like formatting and numbers are covered under usage.

Style and usage to me suggest principles of writing and their application.

These are common terms used in content design and resonates with most people. I would have said style and grammar as my first choice if this section included common grammar mistakes or best practices for formulating sentences.

It's the only one that included usage, which felt necessary to cover things like emoji and formatting.

Summary of recommendations

Findings		Recommendations
1	The data tells us people understand Foundations , but participant comments suggest there's initial confusion.	Keep Foundations and re-test over time. Foundations is an industry term found in many other design systems, including Shopify Polaris, Google Material, Adobe Spectrum, and Atlassian.
2	Talking to customers tested better than Customer contexts , but some people mentioned that everything we do involves talking to customers.	Use Talking to customers as a label, which allows for scalability and has content that can flex for audiences. It will be highly important to educate folks on what can be found in each category, especially folks who have been here awhile. There's an opportunity to use the homepage to highlight this.
3	Some folks felt the categories were too similar .	Design and implement breadcrumbs to enhance wayfinding, discoverability, and familiarity with where things live.
4	Some info, like Writing small and Readability, could go in multiple places .	We explored polyhierarchy, but decided against it due to the relatively small number of pages, increased risk of confusing people, and technical constraints. Instead, we'll create a tagging strategy and design a "related content" component to surface similar content.

Findings		Recommendations
5	Page labels like Content promotion and Communication framework were confusing to people who did the card sorts. Other labels were too long, too vague, or not comprehensive .	Remove low-performing pages that are outdated and don't offer targeted guidance. Combine pages and re-label where it makes sense. Use search data post-implementation as a litmus test.
6	Several people left feedback that search is their preferred method of finding info. One comment sums it up: "I'm typically a search-first user on the content design site which works great for me."	Our search tool is robust. But we can explore ways to improve it even more .
7	Style & usage tested better as a label and meets the criteria of being specific, concise, comprehensive, familiar, and front-loaded.	Change Style & grammar to Style & usage

Proposed sitemap

New IA 2023



Foundations

How to do content design...

Voice & tone

...and sound like Intuit and its products

Accessibility & inclusion

...that works for everyone

Style & usage

...that keeps things consistent

Word list

...using consistent terminology

Talking to customers

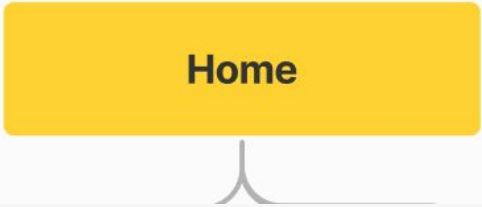
...that flexes to your audience or the moment

Product & UI

...and meet customers throughout workflows and experiences

Marketing

...that inspires people to use Intuit products



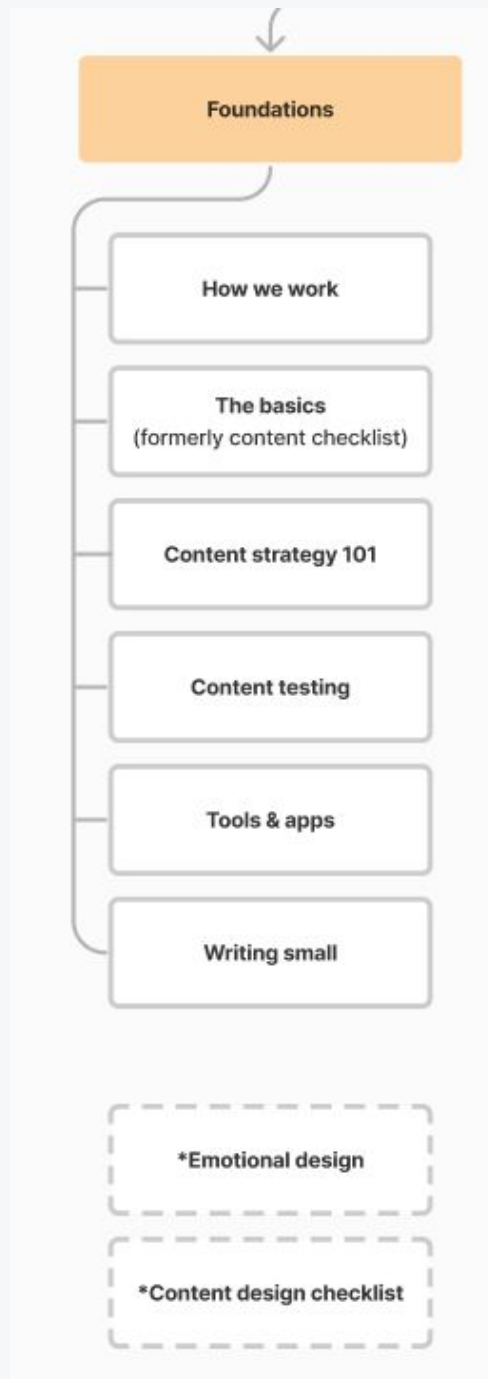
Home

What it is

The homepage introduces people to the site

What people will get out of it

- Here's what Intuit looks, feels, and sounds like
- This is an up-to-date resource that you'll get value out of at every visit
- New user: See what's here, how to use the site, where they can go to quickly get acclimated, how to join us (if they're not an employee)
- Returning user: See a summary of what's new (resources, patterns, word list additions), along with relevant links for deeper dives.

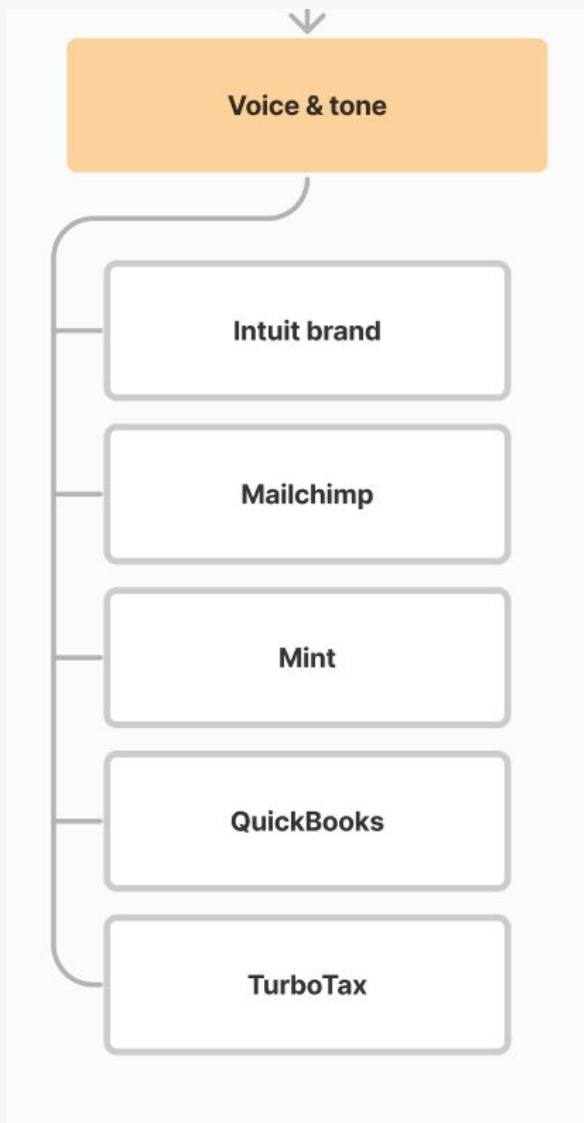


What it is

Ground designers and design partners in the basics so they can create a great experience. We'll compile the fundamental skills and knowledge everyone should have to make great content at Intuit, no matter their role or BU.

What people will get out of it

- Provide foundational info that gives people a place to start when thinking about content
- Provide resources to help design partners understand a content designer's role.
- Offer tools and testing methodologies that help anyone make better content decisions at Intuit.

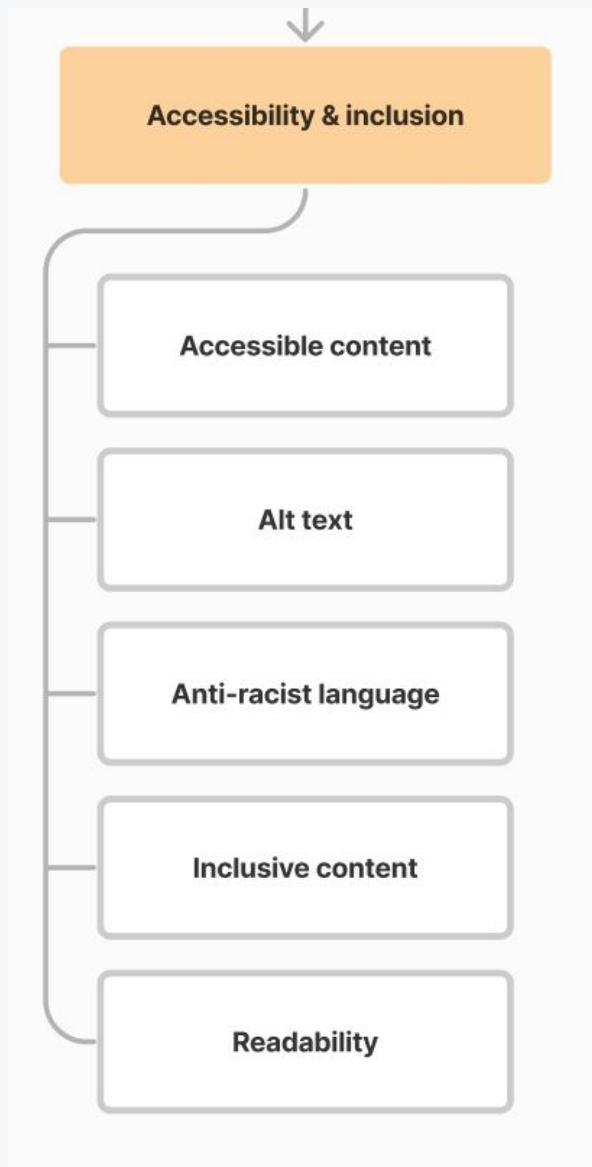


What it is

Illustrate the Intuit brand characters and show how to sound like our products.

What people will get out of it

- Explain what voice and tone is
- See examples of how voice and tone comes to life
- Teach the voice attributes that help people write in a way that presents our products to customers with a unified voice

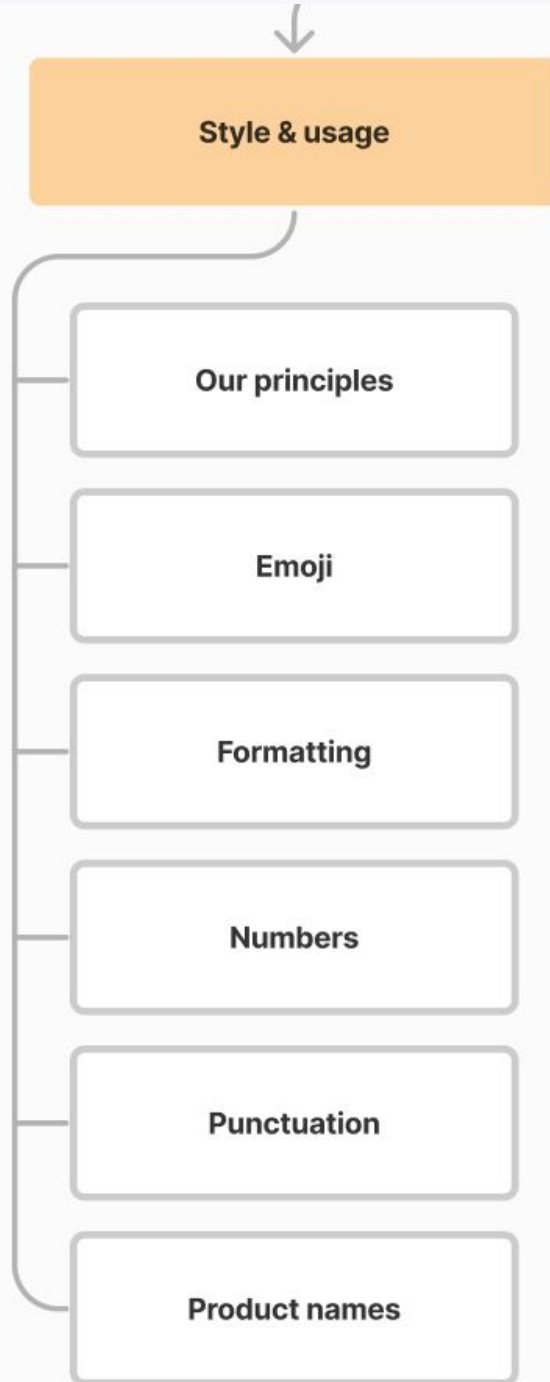


What it is

Teach people how to create content and experiences that work for everyone, no matter what.

What people will get out of it

- Learn principles that help make content accessible, clear, and respectful
- Highlight common gotchas that help us avoid and remove hurtful language
- Learn how language can help make people feel safe, accepted, and understood



What it is

This section was often referred to as the “nitty gritty,” “cut and dry,” more “prescriptive” stuff in card sorts. It outlines our style principles, mechanics like capitalization and punctuation, and things like formatting text, links, and numbers.

What people will get out of it

- These are the specific ways we choose to follow various grammar guidance.
- Here’s what you need to know for content to look consistent across Intuit, no matter the content type.



Word list

What it is

The word list communicates how certain terms are spelled, capitalized, and used at Intuit. It helps make sure we're using terms consistently across the org. It's not exhaustive, nor is it a glossary.

What people will get out of it

- Here's how a word looks, what it means, and some examples of how it's used (if needed)
- If a word is a "don't use" term, here's why and here are some alternatives

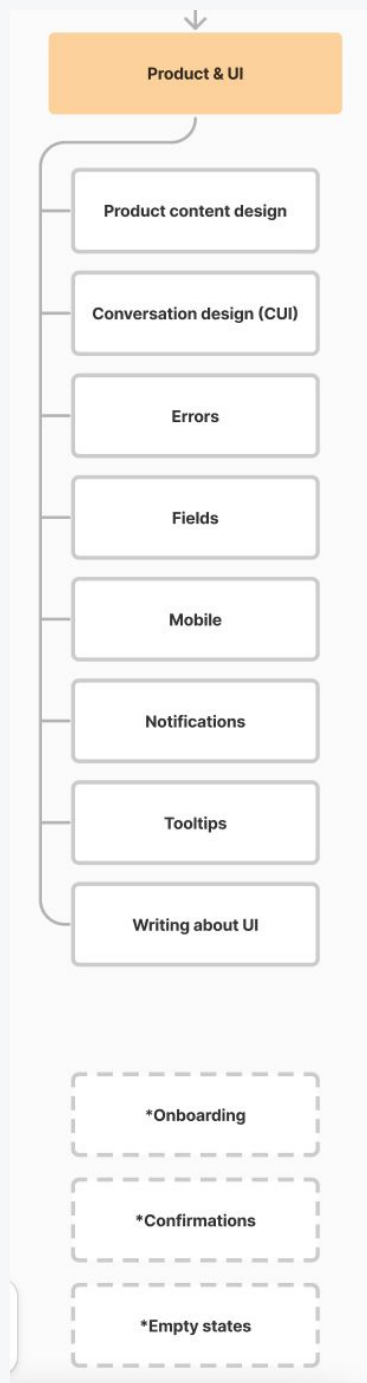


What it is

How we communicate with customers is just as important as what we communicate. Getting specific about where a customer is in the moment helps us meet them where they are.

What people will get out of it

- Learn patterns that deal with moments in time, emotions, how we talk about specific topics, and how we talk to specific audiences.
- Understand how to empathize with our customers and how content changes along with their needs
- Show how content design embodies the Intuit value of Customer Obsession by creating experiences that put the customer first



What it is

Thoughtful, consistent interface content is key to a valuable user experience. This section is where product content designers go to learn about crafting content and experiences at various points in a product or workflow.

What people will get out of it

- Guidance and frameworks for content that contributes to quality product experiences
- How to write for common UI moments, wherever or however content shows up



What it is

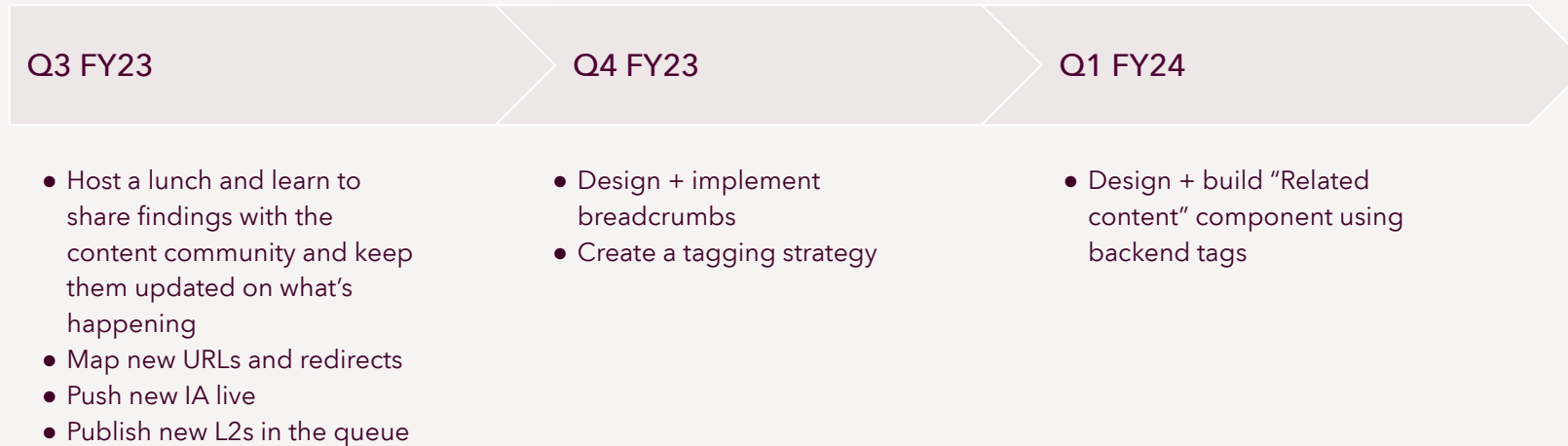
Where marketing content designers go to learn about crafting content at certain points before a customer signs in to the product.

What people will get out of it

- How to consider brand in content decisions
- Create quality experiences that help users learn and grow into our products
- Understand how content differs depending on the platform or content type

Next steps

What's next



Q&A

Appendix

Post-hybrid card sort questionnaire

Any comments, questions, or feedback?

I had no idea what Customer Context meant. The "how to measure" one totally stumped me.

This was a great exercise! I thought I knew where to find things, but some weren't as easy as I was expecting.

I had a hard time with the Credit Karma/CreditKarma one, because I was looking for a terminology list

I love this push! I think a lot of us approach the content design site with a "hunt and peck" mentality, so I really appreciate the team taking the time to make sure things are categorized in a way that meets the proper mental model of users.

There seemed to be overlap -- V+T, Style, -- and I didn't know what the category with the product names would get me.

There were definitely a few cases where I would have searched for guidance at earlier parts of the navigation, and narrowed down if I needed to.

This was a fun exercise! Made me realize there are so many ways to interpret the site.

Mostly able to find what I was looking for with confidence. A few hopeful guesses