

5 Ways to Combine Card Sorting and Tree Testing

A visual guide to choosing the right research sequence for your navigation problem.

-  Card sorting
-  Tree testing
-  Candidate structure

PATTERN	RESEARCH SEQUENCE	USE THIS WHEN	DECISION IT HELPS YOU MAKE
1 <u>Discover a new navigation</u>	 →  →  Open card sort Candidate structure Tree test	You are building a site or feature area and need a first navigation that reflects how people understand its content.	How should we organize the new navigation?
2 <u>Test the categories, then the routes</u>	 →  →  Open card sort Closed card sort Tree test	An open sort suggests categories, but important content placements still need checking.	Where should uncertain content items belong?
3 <u>Compare competing structures</u>	 →  →  Card sort Two candidate trees Tree-test comparison	Participants reveal more than one coherent way to organize the same content, or the team has several credible navigation ideas.	Which candidate structure works better for important tasks?
4 <u>Improve an existing navigation</u>	 →  →  Baseline tree test Card sort Retest revised structure	The existing site has recurring wrong turns, buried destinations or categories that no longer accommodate the content.	Has the revised navigation improved findability?
5 <u>Organize a large content inventory</u>	 →  →  Inventory Card sort + content mapping Tree test	A redesign or migration involves far more pages than you would reasonably hand to one participant to sort.	How should the full inventory map into a navigation we can test?

