Sapient
Information Architecture: Practice
Definition and Process Framework

March 6, 2000 version 1.0

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Introduction

Genesis

The Information Architecture (IA) practice within the Creative discipline at Sapient was established during the role reconciliation process that took place during the summer of 1999. Legacy Sapient, Studio Archetype, and Adjacency each had disciplines within their organizations that played the Information Architect role on projects and each had similar goals and methodologies. These were combined into the Sapient IA practice. *Similar*, however, does not mean *the same*. Within the IA practice, we were faced with disparity in terms, techniques, and assumptions. It was a "you say storyboard," I say "page details" situation. It was apparent from the start that we'd have to learn to speak in a common language with a common voice.

At the most fundamental level, we wanted to have a consistent answer to the question, "What is Information Architecture at Sapient?" That meant not only agreeing on a definition of the practice, but also agreeing on how we do the work. To that end, we began an internal initiative to define the IA process.

This document is the first tangible result of that initiative. It represents the collective thoughts, opinions, and practices of all the current IA Directors at Sapient. What is represented here is truly an example of the whole being greater than the sum of the parts. What we found, as we came together in meetings and work sessions, was that the variations in work practices between the offices, when put together, made for a more complete process than any one office was following.

We have focused on documenting the current IA process to serve as a guide for Information Architects to use as they work on project teams. The process outlined in this document is a framework within which Information Architects work and should be working to be successful. We recognize that teams will need to modify the process to address new types of projects, such as dot.com launches, as well as new ways of thinking, such as object-oriented design. The process framework is not meant to inhibit innovation and new ways of solving problems but to place those activities in context. Over time, there will be many new tools, variations on deliverables, and different methodologies incorporated into the IA process.

We have titled this document Version 1.0 to acknowledge the need for the process to evolve over time. We recognize an immediate source of refinement will result from reviewing "our view of the world" with the other practices within the Creative discipline (Brand Strategy, Content Strategy, Graphic Design, Site Development, and Creative Delivery) as well as other Sapient disciplines (Digital Business Strategy, Experience Modeling or XMOD, Technology, and Integrated Engagement Leadership). We hope it serves as a catalyst for discussions about how we work together. It should help us better understand and define the activities and tasks where collaboration occurs between IA and other practices and disciplines or where there are dependencies between them.

Purpose

This document records the best practices and innovation inherent in the legacy companies and offices into one Sapient IA process framework. The framework becomes a tool that will facilitate the scaling of the IA practice by providing 1) a basis for training current and future Sapient Information Architects and 2) standards for quality and consistency. It will also serve as an input to the overall One Team Approach (OTA).

Contents

The contents of this document include an IA practice definition, our guiding principles, our process framework, activity and deliverable definitions, and a glossary. Future versions will incorporate feedback, address the usability of this document as a reference tool, and address the interrelationships of the IA process with other disciplines.

Credits

This document would not have come into being without the hard work and leadership of all the IA Directors who participated in the process and came together in a spirit of collaboration, openness, and dedication to their work. They were: Isabel Ancona, David Garner, Shuli Goodman, Darian Hendricks, Page Ikeda, Rob Manson-Pollard, Steve McGrew, Joanne Mendel, Mark Stockwell, Miwa Wang, Jen Wolf, and Alder Yarrow. Their work was supported by many IAs and Senior IAs throughout Sapient. Special thanks goes to Joanne Mendel, Alder Yarrow, Page Ikeda, and Isabel Ancona who lead the sub-teams that developed the different parts of the document and fleshed out, reconciled, and synthesized many of the details. Also, special thanks to Darian Hendricks who chaired the IA process committee and served as the project manager, to Sumalee Montano who edited the manuscript, and Arianna Orland who produced it.

Confidentiality

This document is for internal circulation only. There will be a client-facing document in the future after all interested parties have been consulted. In the meantime, should you have a need to share any of this information outside of Sapient, please contact me first.

Feedback

After reading this document, if you have any questions, comments, or feedback, please feel free to contact me at 415.659.4413 or lsvec@sapient.com. Thank you in advance for your interest in this effort.

Lillian Svec
Creative Director
Information Architecture Practice Lead

NOTE: For a detailed description of the process that led up to the creation of this document, please see the background section at the end of this document.

Information Architecture practice definition

An information architecture is the underlying organizational structure for a system of content and interactions.

Information Architecture is the practice of creating plans that describe the underlying organizational structure for a system of content and interactions.

Sapient Information Architects are designers that create plans for how an interactive experience works. Balancing the needs of the business and the users with the capabilities of technology, we design comprehensive systems that include the organization, navigation, and interaction of the final solution. Our resulting plans become the foundation that other disciplines use to create and implement the content, graphical user interface (GUI), and technology solutions.

Solution

user-centered design

business strategy

technology
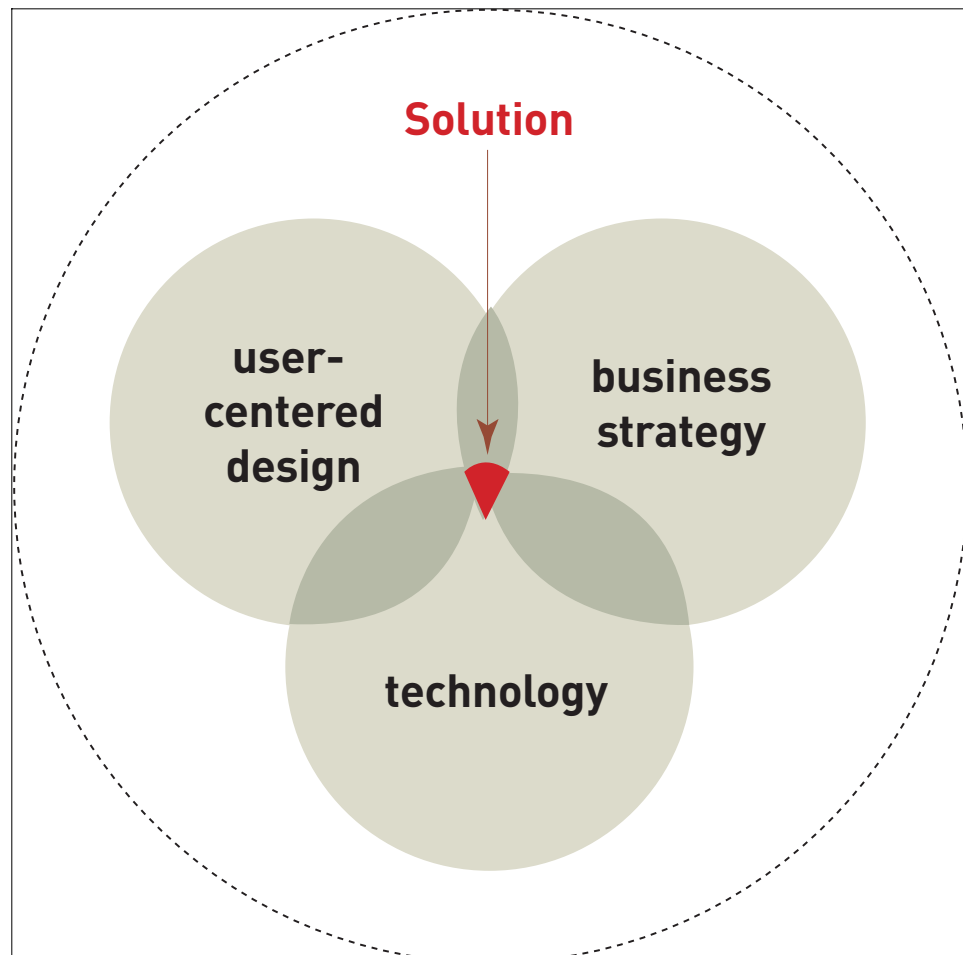
Guiding principles for the Information Architecture practice

Guiding principles for the Information Architecture practice were created to provide IAs direction in the design process and to function as a tool to evaluate design work. Each guiding principle sets a goal or standard to be followed and is supported by questions that provide further definition and practical methods to achieve the goal.

Guiding principles

1. Seek to solve the right problem at the right level during every stage of the project.
2. Design solutions that reconcile user needs, business objectives, and the capabilities of technology.
3. Never get too far away from the users.
4. Explore multiple possibilities at every stage of the project.
5. Identify what you don't know and find a way to answer it.
6. Collaborate with all team members and validate our work with them.
7. Communicate and think visually: communicate complex ideas in a simple and easy-to-understand manner.
8. Strive to create innovative and compelling user experiences.
9. Design holistic site organizational structures and navigation systems that are scalable and flexible.
10. Ensure the architecture fulfills the needs and dependencies of other practices.

Guiding principles in detail

1. Seek to solve the right problem at the right level during every stage of the project.
- Has the proposal evaluated the opportunity correctly, assessed the project scope accurately, estimated your time and level of activity accurately?
- Do you have a clear process plan that indicates what the team will be doing in each step the project?
- Does the level of effort required by your solution match the importance of the solution to the user, the amount of time needed for development, and the expectations of the client?
- Are you working at the right level of detail and not trying to solve problems before you have the appropriate information?
- In each step of the project are you thinking of how to work from one step of the problem to the next?
  Examples:
  - How to create models and frameworks from the information gathered in focused research to identify business opportunities
  - How to reconcile business opportunities and user needs to generate concepts
  - How concepts can be interpreted into site architectures and user scenarios
  - How to distill a site architecture into screen details and navigational schemes
  - How to develop prototypes from user scenarios
  - How to utilize user task models to develop process flows, data models and functional specifications

2. Design solutions that reconcile user needs, business objectives, and the capabilities of technology.
- Do you understand how the business opportunities and requirements fit into our conceptual and design work?
- Are your solutions meeting the client's business needs and supporting the revenue model?
- Can the client organization support the solution?
- Do you feel that you have an adequate understanding of the business and target audiences to determine next steps?
- Are you utilizing audience research provided by the client or your own user needs research?
- Are you considering what aspects of the technologies can be leveraged into the solution?
- Are you looking for the relationships, patterns, and dependencies across business objectives, user needs, and technology capabilities?

3. Never get too far away from the users.
- Are you identifying where you are making assumptions in your work?
- Are you always testing your assumptions and validating your work with users?
- Are you designing for usability? Are you familiar with standard usability practices? Are you doing heuristic evaluations of key or complex interactions?
- Are you designing for usefulness? Do the solutions you are providing meet the needs and goals of users? Are you validating design work with what is valued by the users?
- Are you practicing empathy in your design by endeavoring to understand the needs, desires, goals, and behaviors of potential users?

4. Explore multiple possibilities at every stage of the project.
- Are you pushing yourself to conceptualize, innovate, and envision new solutions and ideas?
- Are you identifying and documenting the trade-offs between different options?
- Are you evolving your work through an iterative cycle of concepting, evaluation, refinement, and revision?
- Are you balancing the use of existing conventions with opportunities to improve or innovate?
- Do you know when it is appropriate to stop iterating an idea and start over from scratch in an effort to create something better?
- Have you solicited feedback from others who may have alternative solutions to the same problem?

5. Identify what you don't know and find a way to answer it.
- Are you designing beyond the knowledge you have of the end user?
- Are you identifying and documenting where you are making assumptions in your work?
- Are you utilizing subject matter expertise?
- Are you actively researching relevant markets, industries, or specific subjects?
- Are you figuring out ways to acquire the knowledge you don't have or testing what you have assumed?

6. Collaborate with all team members and validate our work with them.
- Do you understand how you need to work with other team members at each step in the process in order to be successful in your role and in creating your deliverables?
- Are you documenting and transferring knowledge to the other practices?
- Are you working with a multidisciplinary set of skills?
- Are you collaborating with other team members at critical points in the project? Examples:
  - IA/IA: reviewing your work and thinking with peers and mentors
  - IA/Integrated Engagement Leadership: process design
  - IA/Digital Business Strategy and Brand Strategy: focused research, synthesis of the findings, and identification of the opportunities
  - IA/Content Strategy: high-level site structure, screen lists, instructional copy, content management system logic
  - IA/Site Development: appropriate functionality for target browsers, viability of screen-level design and interactivity
  - IA/Experience Modeling: discovery research, analysis of findings, conceptual development, test plans
  - IA/Graphic Design: page-level structure, interaction design, and navigation
  - IA/Technology: high-level site structure, process flows, data validation and specification, integration with implementation systems and packages

7. Communicate and think visually: communicate complex ideas in a simple and easy-to-understand manner.
- Are you participating in focused research and synthesizing the results into findings, models and frameworks that are useful for identifying areas of opportunity for the client?
- Are you using visual communication techniques to clarify relationships and model solution concepts?
- Are you developing and communicating your site architecture through a series of schematic representations in the form of site maps, process flows, screen details and prototypes?
- Are you considering the audience for communications you're creating and adjusting the presentation of information, findings, and models accordingly?
- Are you simplifying information and messages and not adding complexity in all your communications?
- Are you helping others to express their ideas by applying your visual communication techniques?

8. Strive to create innovative and compelling user experiences.
- Are you familiar with the current ideas of Information Architecture thought leaders?
- Are you familiar with design and interaction and technology best practices currently on the Web?
- Are you balancing the use of existing conventions with opportunities to improve or innovate?
- Are you evaluating your designs for simplicity and elegance?

9. Design holistic site organizational structures and navigation systems that are scalable and flexible.

- Does your site map provide organizational structure for the solution at its highest level?
- Does it effectively communicate the location and relationships of all content types and functionality?
- Does it describe how messages and transactions will be grouped, what the relationships are between the groupings, and how the user will navigate within and between them?
- Is the navigation system useful and usable? At every point, do users know: 1) where they are, 2) where they've been, and 3) where they can go from there?
- Does the screen-level design provide users with clear choices for accomplishing their key tasks?

10. Ensure the architecture fulfills the needs and dependencies of other practices.

- Does your architecture serve as a blueprint for the development of the visual interface and interaction design?
- Does it incorporate content requirements and content management system rules?
- Is it a blueprint for the back-end developers? Can someone use the deliverables that you have created without your involvement to build the solution?
- Does it represent the functionality of the implementation package(s) correctly?
- Have you communicated all assumptions?
- Are there additional levels of detail that you need to work through in order complete the design and communicate it to others?

The Information Architecture Process Framework

Discover | **Define** | **Concept** | **Design** | **Implement**

1 Pre-project
2 Understand the context & scope
3 Synthesize variables. Define the problem.
4 Explore possibilities
5 Architect and iterate the solution
6 Implement and test the design
7 Transfer knowledge

K Refine concepts

A Participate in client pitch
B Inform proposal
C Review proposal
D Establish project context & focus
E Plan process Revise scope
F Conduct focused research
G Synthesize info.
H Define problem
I Develop concepts
J Evaluate concepts
L Choose concept
M Create site structure
N Model processes/ activities
O Define detail
P Evaluate, validate architecture
Q Complete architecture docs.
R Review GUI design
S Review site build
V Issue resolution
W Transfer knowledge

project plan | *definition document* | *final concept* | *site map* | *process flows* | *screen details* | *IA docs. to project team* | *GUI + HTML* | *site goes live*

Definition of a process framework:
An ordered progression of defined steps that consist of activities. Each step has explicit entry and exit criteria.

Description:
This framework gives an overview of the Information Architecture process. The seven primary steps describe the change in IA emphasis from the beginning to the end of a project.

Within each of the 7 process steps there are specific sequences of activities. As the diagram shows, some activities are iterative. In all the steps, IA activities involve both divergent and convergent thinking, initially addressing broad goals and possibilities before further focusing the problem. Each process step is dependent on the integrity of the work done in the one that preceded it. To insure continuity between the steps, the work that's accomplished to exit from each step becomes the the work necessary to begin the next.

Milestones, indicated by diamonds, are the points of closure along the way for the project team and client. At these points primary deliverables are finished and client sign-off is required.

This process currently represents the project types most common for IAs on multidisciplinary teams but must be developed further to flex with the wider range of project types being offered to clients.

The process framework is also mapped against the project phases which currently make up the One Team Approach at Sapient: Discover, Define, Concept, Design and Implement. The IA process framework described in this document is designed to be independent of any particular delivery approach, and the correlation of IA activities to OTA steps may change as projects require or as the OTA evolves.

DDCDI project stages

Discover | Define | Concept | Design | Implement

IA process steps

1 Pre-project
2 Understand the context & scope
3 Synthesize variables. Define the problem.
4 Explore possibilities
5 Architect and iterate the solution
6 Implement and test the design
7 Transfer knowledge

IA activities

Milestones

project plan | definition document | final concept | site map | process flows | screen details | IA docs. to project team | GUI + HTML | site goes live
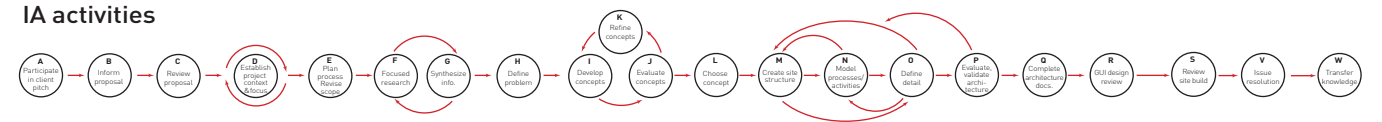
Divergent and convergent thinking
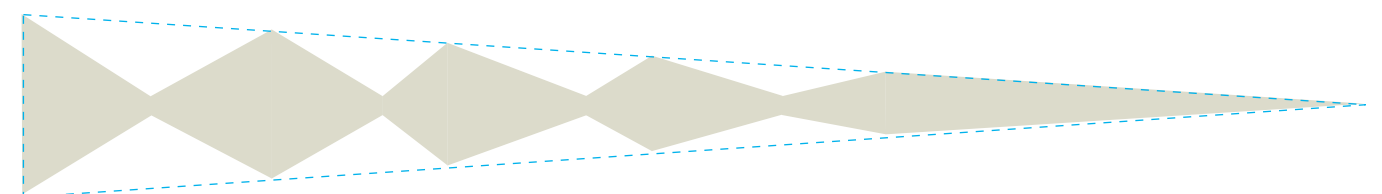
How to Approach The Process Framework

1 **Pre-project**

Entry criteria

- RFP

Process path

IA pre-project
entry point

A
Participate
in client
pitch

B
Inform
proposal

Process activities

(A) Participate in client pitch
- particpate in knoweledge
  transfer from client
- educate client about
  creative roles

(B) Inform proposal
- evaluate the opportunity
- assess the level and type
  of project engagement
- assess the project scope,
  required activities, resources,
  and schedule

Deliverables

(A) Participate in client pitch
- ● educational material

(B) Inform proposal
- ○ proposal

Exit criteria

- project proposal generated

Step:
Each step is numbered with a descripion of what the focus of the work is in that step.

Entry criteria:
Entry criteria are the requirements needed to begin a step.

Process path:
The path is made up of activities that describe the work an IA is doing. It shows when activities are done in succession and when they're iterative.

Process activities:
This provides a more detailed description of what the IA activities are. The IA team participates in all activities shown.

Deliverables:
These are the artifacts generated from an activity. The symbols indicate if IA owns the deliverable, IA owns part(s) of the deliverable, or if IA is a contributor to the deliverable. Other deliverables that are not shown here have no input from IA and are owned by other disciplines.

Key

● deliverables owned by IA

◐ deliverables partly owned by IA

○ deliverables that IA has input to
  or consents to

Exit criteria:
This list of activities should be completed by the end of the project step. The exit criteria from each step becomes the entry criteria for the next step.

This way project teams build on the work they've done in the previous step and anticipate what they'll need to work with in the next step.

Team process plan check: ✓ **team process plan**
The team creates a process plan for how they will approach their work. At the beginning of each process step they review the plan to ensure their work is on track and to see if the process plan needs to be revised. This is also a time for the team to review and update the issues log.

Process Framework for Information Architecture

		Discover		Define	Concept
	1 Pre-project	**2** Understand the context & scope		**3** Synthesize the variables / Define the problem and opportunities	**4** Explore possibilities

Entry criteria

1 Pre-project
- RFP

2 Understand the context & scope
- signed proposal
- client and Sapient project teams fully assembled
- IA educational materials for client + project team

3 Synthesize the variables / Define the problem and opportunities
- client knowledge transfer completed
- client expectations + drivers defined
- list of clear objectives obtained from client
- critical success factors defined
- statement of client's vision written
- identify goals for focused research
- IA time and cost estimate
- project plan that consists of:
  - revised proposal (as needed)
  - team process plan
  - project schedule
- **client consensus and sign-off**

4 Explore possibilities
- finding/models generated from research
- user audiences + needs identified
- current state analysis completed
- business problem defined
- client technical capabilities assessed
- areas of opportunity identified
- recommendations made for solutions

(continued, partially cut off)
- brand stra...
- content stra...
- reconciliat... objectives...
- (high-level... identified
- package se... established
- technical b... established
- **client cons... and sign-of...**

Process path

IA pre-project entry point

A Participate in client pitch → **B** Inform proposal

IA project entry point

C Review proposal → **D** Establish project context &focus → **E** Plan process revise scope

◆ **project plan**

✓ **team process plan**

F Conduct focused research → **G** Synthesize info. → **H** Define problem

◆ **definition document**

✓ **team process plan**

K Refine concepts
I Develop concepts → **J** Evaluate concepts

Process activities

A Participate in client pitch
- participate in knowledge transfer from client
- educate client about IA and creative roles

B Inform proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, resources, and schedule

C Review proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, Ł and schedule

D Establish project context & focus
- clarify project objectives and vision
- determine client drivers for the project
- understand client expectations for deliverables
- determine the critical success factors
- identify risks
- participate in knowledge transfer from client for:
  - client organizational structure
  - industry context
  - competitors
  - stakeholders
  - business requirements
  - market research + other information on user audiences
  - client strengths and weaknesses
  - constraints and opportunities
  - requirements for the end product/solution
  - technology capabilities
  - project historical context: with Sapient and/or others
- conduct a user experience analysis of client Web site
- summarize the findings
- identify information gaps in knowledge transfer and what's needed to fill the gaps

E Plan process + revise scope
- identify goals for focused research
- develop a team process plan
- review team roles and responsibilities
- revise project schedule
- revise proposal (as needed)

F Conduct focused research
- define criteria for evaluating the research and the metrics for measuring it
- identify the appropriate formats for capturing research

business
- understand industry context
- determine the business drivers
- define best practices
- analyze the current state of client's business model, products, and services
- conduct a competitive audit

users
- identify the user audiences
- participate in primary and secondary research on audiences and user needs

technology
- develop package selection criteria based on the research findings

G Synthesize information
- distill research into findings and visual information models
- identify patterns in the findings and models
- develop user scenarios
- identify initial areas of opportunity based on the research findings and models
- validate findings with client and users
- evaluate potential packages

H Define problem
- define the business problem
- validate the problem against project objectives, vision, and opportunities
- perform an initial reconciliation between business viability, user needs, and Ł technology capabilities
- identify a (high-level) set of features and reconcile with project scope
- recommend potential solutions
- propose a strategy for moving forward

I Develop concepts
- continue reconciliation of business viability, user needs, and technology capabilities
- brainstorm concepts
- participate in developing a plan for us...
- participate in user field research
- further develop user scenarios
- sketch potential concepts + associate...
- create concept/organizational model...
- collaborate in creating the plan for use...

J Evaluate concepts
- create concept prototypes
- test concepts and/or concept prototype...
- analyse test findings with team
- make recommendations to client

K Refine concepts
- incorporate feedback and evaluations from testing into revising the concept...
- iterate through testing, feedback, eva... and revision as needed.

L Choose concept
- select a concept(s)
- document concept(s)
- present concept(s)
- revalidate the scope matrix

Deliverables

A Participate in client pitch
- ● client IA educational material

B Inform proposal
- ○ proposal

C Review proposal

D Establish project context & focus
- ◐ summary of findings

E Plan process + revise scope
- ● internal IA educational materials
- ◐ summary of findings
- ◐ project plan that consists of:
  - revised proposal (as needed)
  - team process plan
  - project schedule
- ○ strategy document

F Conduct focused research
- ● current site map
- ◐ user experience audit
- ◐ current site audit
- ◐ competitive audit
- ○ package selection criteria

G Synthesize information
- ◐ user task models
- ◐ informational diagrams
- ◐ user audience models
- ◐ user profiles
- ◐ user scenarios
- ◐ secondary research findings
- ◐ executive interview findings
- ○ package evaluation document

H Define problem
- ● (high-level) feature list
- ○ definition document
- ○ scope matrix

I Develop concepts
- ● concept models
- ● user task models
- ● concept scenarios
- ◐ concept prototypes

J Evaluate concepts
- ◐ concept prototypes
- ◐ user testing findings

K Refine concepts
- ◐ revised concept(s)

L Choose concept
- ● feature list
- ◐ concept document

Exit criteria

1 Pre-project
- project proposal generated
- **client consensus and sign-off**

2 Understand the context & scope
- client knowledge transfer completed
- client expectations + drivers defined
- list of clear objectives obtained from client
- critical success factors defined
- statement of client's vision written
- identify goals for focused research
- IA time and cost estimate
- project plan that consists of:
  - revised proposal (as needed)
  - team process plan
  - project schedule
- **client consensus and sign-off**

3 Synthesize the variables
- finding/models generated from research
- user audiences + needs identified
- current state analysis completed
- business problem defined
- client technical capabilities assessed
- areas of opportunity identified
- recommendations made for solutions
- brand strategy assessed
- content strategy assessed
- reconciliation made with objectives and vision
- (high-level) features identified
- package selection criteria established
- technical benchmark established
- **client consensus and sign-off**

4 Explore possibilities
- single concept selected
- scope, vision, and requirements validate...
- feature list generated
- package selection confirmed
- list of open issues and risks generated
- **client consensus and sign-off**

Key

- ● deliverables owned by IA
- ◐ deliverables partly owned by IA
- ○ IA has consents to or has input into these deliverables

◆ project milestones + client sign-off points

✓ **team process plan**
review and update team process plan before beginning each new project phase

5 Architect and iterate the solution
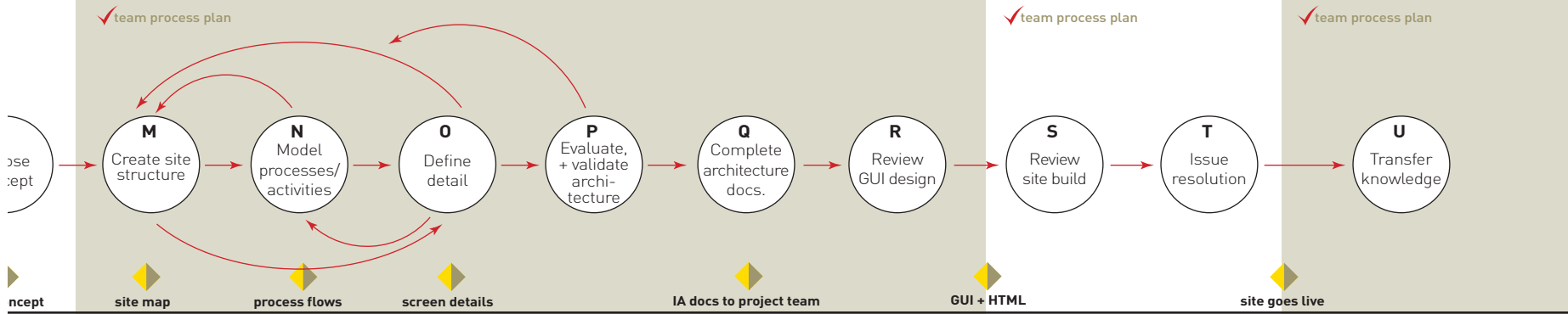## 6 Validate and test the design
7 Transfer knowledge

Column 5 top (phase outputs):
- single concept selected
- scope, vision, and requirements validated
- feature list generated
- package selection confirmed
- list of open issues and risks generated
- **client consensus and sign-off**

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Column 6 top:
- functional specifications are final
- findings from prototype testing have been incorporated
- IA documentation validated by and delivered to the project team and client
- open issues resolved
- locked scope
- process for QA defined
- schedule for build releases created
- **client consensus and sign-off**

Column 7 top:
- defined maintenance plan
- functional specifications updated to reflect changes
- access to feedback (client, user, and server logs)
- list of issues created
- implementation complete

✓ team process plan (x3)

Process flow (circles):
- M — Create site structure
- N — Model processes/ activities
- O — Define detail
- P — Evaluate, + validate architecture
- Q — Complete architecture docs.
- R — Review GUI design
- S — Review site build
- T — Issue resolution
- U — Transfer knowledge

(Left partial: ose cept)

Milestone markers:
- ncept
- site map
- process flows
- screen details
- IA docs to project team
- GUI + HTML
- site goes live

(M) Create site structure
- interpret concept into a high-level site architecture
- group content into primary sections for the site
- explore navigational models and relationships among content, functionality, and the sections of the site
- develop initial nomenclature for site sections
- define the page types and develop a numbering system
- review the types of content and the content hierarchy
- reconcile existing content into the site structure
- identify functionality that needs technical exploration

(N) Model processes & activities
- define interactions between and within the site sections
- model user tasks and data inputs/outputs to the system
- identify the functional elements that are similar or repeating in different areas of the site and make consistent
- identify data feeds, interactions with outside systems
- validate process flows with appropriate team members
- identify the areas for instructional copy
- identify complex areas, new interaction models for testing
- collaborate in creating the plan for user testing
- revise site architecture to reflect final process flows

(O) Define detail
- create screen details consisting of page level navigation, content types, and functional elements
- design the functional elements based on user tasks
- utilize standard notation in creating screen details
- develop a prototype for user testing with screen details
- ensure consistency of interaction behavior in prototypes
- identify interaction areas for further innovation
- devise a template system for unique screens and screen components in the architecture
- inventory the site and list the pages
- define/validate data format specifications
- revise site architecture and process flows based on screen details

(Left partial: earch / ures / g / users / n,)

(P) Evaluate & validate architecture
- determine the documentation format for recording user feedback from prototype testing
- test the interaction prototypes with users
- evaluate test results with team
- revise the interaction prototypes based on evaluation
- iterate through testing, feedback, evaluation, and revision as needed
- validate the final design solutions with team members

(Q) Complete architecture documentation
- revise site architecture documentation: detail screens, process flows, site map
- plan production schedule with other team members
- review process flows with appropriate team members
- revise the screen list and numbering system[2]
- revise the template system and screen components in the architecture
- review screen details and site map with team members
- collaborate on the review of screen details for nomenclature, logic, and adherence to rules of CMS
- validate package functionality/requirements
- develop data specifications at the page level
- collaborate on writing functional specifications
- deliver completed IA docs to project team and client

(R) Review GUI design
- collaborate on the interaction design: interpretation of navigation, screen functionality, layout
- review GUI design for adherence to IA docs
- assist in selecting key pages for client presentation
- ensure page designs meet browser technical standards
- collaborate on the high-fidelity prototype
- refine template system based on finalization of GUI
- revise the functional specifications
- lock scope

(S) Review site build
- review the integrated build –including: –navigation –content –assets –design –information architecture –functionality –system respones and performance
- make design adjustments
- participate in testing the build
- update functional specifications

(T) Issue resolution + quality control
- participate in QA testing
- make QA notes
- submit TARs
- make design adjustments
- update TAR
- update specifications
- retest new build

(U) Knowledge exchange to the back end team
- incorporate feedback from server logs, client, and users
- resolve issues from gaps between design and implementation steps

Transfer knowledge to the client
- develop the deliverables that will enable client to maintain the integrity and functionality of the site

Transfer knowledge to the IA practice
- document project findings in a case study
- communicate feedback to IA practice and to other project teams

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(M) Create site structure
- ● site map
- ○ content matrix

(N) Model processes & activities
- ● process flows

(O) Define detail
- ● screen details
- ● interaction prototypes (low or mid-fidelity)
- ● screen template system
- ● screen list
- ◑ data specifications

(P) Evaluate & validate architecture
- ◑ user testing findings

(Q) Complete architecture documentation
- ● functional specifications
- ● site map
- ● screen details
- ● screen list
- ● screen template system
- ● process flows
- ◑ data specifications
- ○ content matrix

(R) Review GUI design
- ◑ high-fidelity prototype

(S) Review site build
- ◑ update functional specifications

(T) Issue resolution + quality control
- ◑ TARs
- ◑ update functional specifications

(U) Knowledge exchange to the back end team

Transfer knowledge to the client
- ● IA training materials
- ◑ planning and facilitation workshops
- ◑ style guide

Knowledge transfer to the IA practice
- ● case studies

Column 5 bottom:
- functional specifications are final
- findings from prototype testing have been incorporated
- IA documentation validated by and delivered to the project team and client
- open issues resolved
- locked scope
- process for QA defined
- schedule for build releases created
- **client consensus and sign-off**

Column 6 bottom:
- screen freeze designated
- all interface TARs are resolved
- maintenance plan is defined
- functional specifications updated to reflect changes
- **client consensus and sign-off**

Column 7 bottom:
- performance measured (metrics)
- cause of issues identified
- lessons learned are identified
- recommendations made for next steps
- client fully understands site architecture and implementation
- metrics determined for post-launch success evaluation

Entry criteria
• RFP

A
Participate
in client
pitch
→
B
Inform
proposal

Exit criteria
• project proposal generated
• **client consensus and sign-off**

Step 1: Pre-project

Step 1 overview
The IA practice is represented in and contributes to the sales pitch on key projects.

Key goals:
- Ensure client engagement is an appropriate type of project for Sapient
- Scope the size of the project
- Sell client on Sapient's capabilities
- Educate client about the Creative discipline, practices, and methods
- Ensure realistic and profitable proposal
- Understand the resourcing demands of the engagement
- Collaborate in the creation of a high-level project plan and cost estimate

Key activities:
- A. Participate in client pitch
- B. Inform the proposal

Key interactions with other team members:
- Work with Business Development and Integrated Engagement Leadership to produce presentations
- Work with Business Development to evaluate creative scope and impact of potential project
- Work with the entire pursuit team to develop strategies for positioning Sapient and presenting our proposed approach to the client

Deliverables by activity:
- A. Participate in client pitch
  - Client IA educational materials ●
- B. Inform the proposal
  - Proposal ○

Length of step:
- As long as required to close the deal
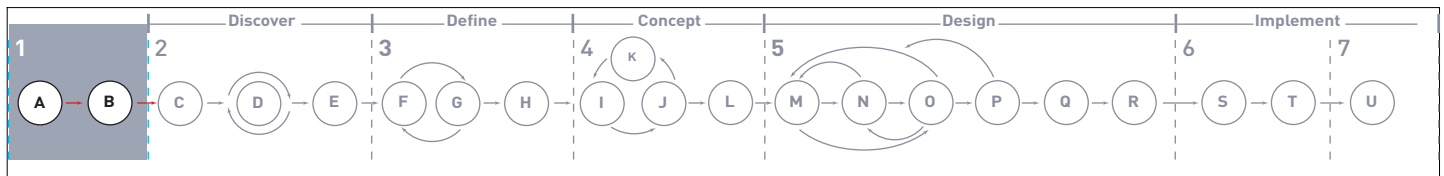
Step 1 activities

A. Participate in client pitch

Ideally the IA practice should be represented in the initial work that is done to pitch the client. The IA representative, often an IA Director, would participate in listening and learning about the client's desires and then propose ways that we might work together. The IA representative should educate the client on the Sapient One Team Approach, the creative process, as well as the role that Information Architects play on a project.

Techniques:
- Client meetings
- Internal meetings
- Conference calls

Team members involved:
- IA Director
- Other discipline directors/practice leads
- Business Development
- Director of Creative Delivery

Length of activity:
- As long as it takes

B. Inform the proposal

Once we have completed our pitch to the client and the client has expressed an interest in working with Sapient, the IA representative should assist in constructing a proposal. The IA representative should work with other team members to inform and evaluate the overall scope, estimation, plan, and resourcing for the project. The IA representative should work with the other team members to ensure the appropriateness of the work we are proposing and the overall strategic value of the engagement. In some cases the IA representative may be required to collaborate in the development of initial recommendations or approaches to be included in the proposal.

Techniques:
- Group discussions of client and project
- Conference calls
- Staffing models
- Sample project plans
- Estimating level of effort for IA based on anticipated sections/functionality
- Estimating the overall level of complexity

Team members involved:
- IA Director, other discipline directors, practice leads, Business Development, and DCD

Length of activity:
- One to three weeks

Step 1 deliverables
Note: All deliverable examples discussed in this section can be found on the Sapient network at \\webteam\information_architecture\deliverables

Client IA educational material   Activity A: Participate in client pitch
🔴 IA owns

These are definitions, explanations, and examples about Information Architecture to help the client better understand the value of the IA practice at Sapient. The educational materials can be generic or customized for a specific client, and the material can be a stand-alone deliverable or part of a team deliverable. Client educational materials can be used throughout the project to help articulate the Information Architecture perspective and to give context to a problem or solution. Educational materials are particularly useful in situations when the client does not understand a certain offering, situation, or solution.

Overview

Purpose	• Communicate the definition and value of the Information Architecture practice and process • Support and help the client understand the situation, proposed solutions, and recommendations • Educate the client about the Internet industry and how Sapient provides solutions
Audience	• Client
Major components	• Stated problem or solution • Explanation or definition • Example
Supporting activities	• Client meetings
Recommended steps	• Identify the key issues and concerns that need to be addressed • Write or diagram the explanation that includes an example that helps illustrate the point • Incorporate materials as part of a team deliverable if necessary
Contributors	• All team members
Software	• Any program of choice
Doneness criteria	• When all questions and concerns have been addressed by the materials

Proposal

⭕ IA inputs / consents

The proposal is the high-level explanation of planned activities and deliverables that serves as a contract for a specific project.

Overview

Purpose	• To plan the high-level IA activities and deliverables that will occur during the proposed time frame • To ensure that the proposal is realistic and to help define the approach and assumptions that client and team will agree to
Audience	• Client

Discover — Define — Concept — Design — Implement

Entry criteria
• signed proposal
• client and Sapient project teams fully assembled
• IA educational materials for client + project team

C Review proposal
D Establish project context + focus
E Plan process revise scope

project plan

Exit criteria
• client knowledge transfer completed
• client expectations + drivers defined
• list of clear objectives obtained from client
• critical success factors defined
• statement of client's vision written
• identify goals for focused research
• IA time and cost estimate
• project plan that consists of:
    revised proposal (as needed)
    team process plan
    project schedule
• **client consensus and sign-off**

Step 2: Understand the context and scope

Step 2 overview

The purpose of this step is to obtain knowledge from the client. This is a step where the team needs to take responsibility for making sure they understand how the client sees the problem, what solutions the client may have in mind, and where knowledge gaps exist. The knowledge gathered here serves as the starting point for focused research in the next step, and allows the team to assess risk and create a schedule and plan for moving forward.

Key goals:
• Clarify the client's objectives (what is the problem they think they are trying to solve?)
• Determine the client's key drivers
• Understand the client's expectations
• Understand the current state of the client's business at a high level
• Define and document the vision and success factors for the engagement
• Define the target audience for the solution
• Define what needs to be explored or better understood
• Define the gaps or inconsistencies in information

Key activities:
• C. Review the proposal
• D. Establish the project context and focus
• E. Develop process and revise scope

Key interactions with other team members:
• Work with Digital Business Strategy to assess business, industry, and competitive contexts
• Work with Brand Strategy and other Creative practices to define current brand/creative strengths and weaknesses
• Work with Technology to understand the current systems and operations in place
• Work with client and XMOD to get a basic understanding of user types, behaviors, and tasks to be explored further
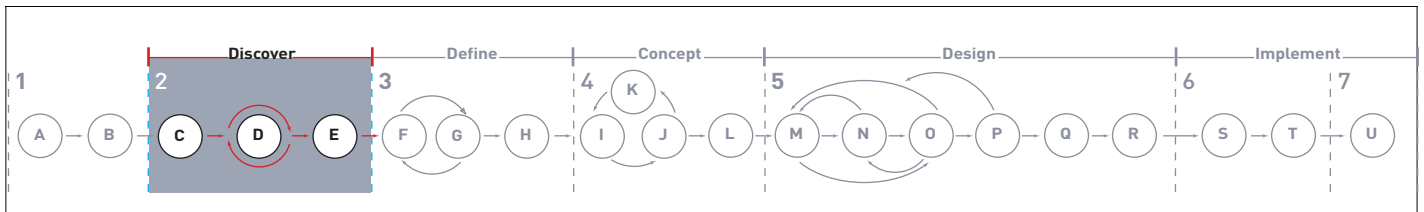
Deliverables by activity:

- C. Review the proposal
- D. Establish the project context and focus
  - Summary of findings
- E. Develop process and revise scope
  - Internal educational materials
  - Summary of findings
  - Project plan
  - Team process plan
  - Strategy document

Length of step:

- One to four weeks depending on the complexity and size of the engagement
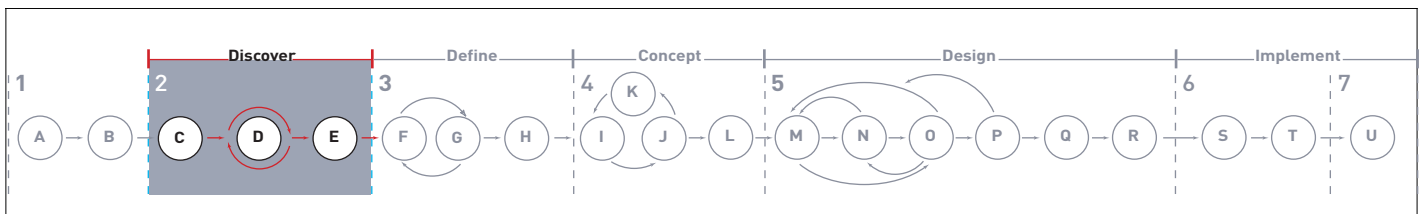
Step 2 activities

C. Review the proposal

In some cases, when the project has gone through a fairly rapid proposal process, or because of resource constraints, IA involvement on a project might begin after a proposal has already been accepted by the client and the scope of work for the initial phases of the project has already been determined. In these cases, the IA team should review the proposal as its first activity in order to understand the exact terms of the engagement. Has the scope been accurately estimated? What are the areas of ambiguity or risk?

If the IA team has participated in pre-project activities, the proposal review could be more cursory, with the goal of understanding any changes that may have been made since the initial presentation.

Techniques:
- Step-by-step review of the proposed plan to validate feasibility of all proposed timelines/schedules
- Analysis and understanding of the work that has been agreed to
- Internal meetings with the people who helped sell the deal to fill in gaps or clarify scope and terms

Team members involved:
- IA

Length of activity:
- A couple of hours
-

D. Establish the project context and focus

This activity should be the primary IA activity during the OTA Discover phase of any project. The investigative research that the IA performs in this step should focus on creating an initial picture of the client's business, target audience, brand, industry, competition, current customers, current Web and non-Web presence, the client's goals and vision, and assets and liabilities on many fronts. The key client stakeholders should be identified—including the budget owners, executive sponsors, and at a minimum, a leader from each client division or organization that will be impacted by the project. Don't depend on the client to provide these names to you. Often, the client will not have a clear idea of who these people are.

Overall, this activity should be focused on identifying the general state and historical context of the client's organization, business strategy, brand, technology, and customer base. The outcome of this activity should be a strategy document or summary of findings identifying key areas of investigation for the next phase of the project as well as client/team consensus on where the project needs to go and why.
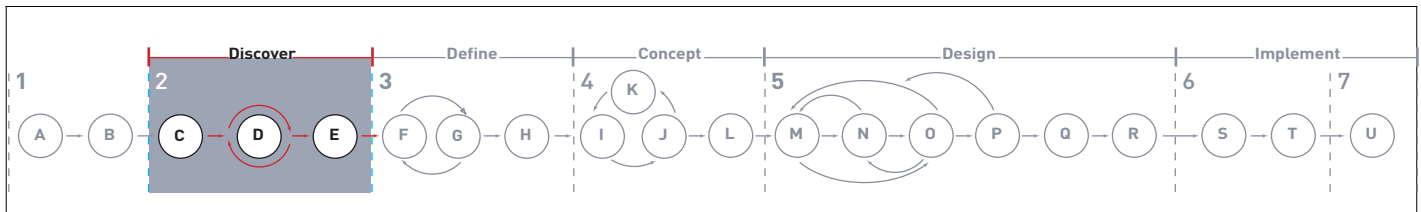
Techniques:
- One-on-one interviews with key client stakeholders
- Workshops
- Conference calls
- Site visits
- Meetings

Team members involved:
- Entire team. It is important for the IA team to participate in many of the activities/interviews that team members from other disciplines and practices set up. For instance, it's a good idea for an IA to be involved in the discussions about the technical capabilities and system architecture of the client's organization. The IA may not necessarily lead many of the activities in this phase, but it is important that the IA receive the information that is gathered to inform future IA activities.

Length of activity:
- One to five weeks depending on the scope of the project

E. Develop process and revise scope

Once we have a clear understanding of the direction and goals of the project, a process and detailed schedule need to be put together. The team should agree on how the One Team Approach will be adapted for this project and how the various team members will work together.

Senior team members should develop a team process plan that the entire team approves. It should include a detailed schedule that describes the timeline, tasks, major milestones, dependencies, and staffing for the next project phases. Once complete, this plan should be used to re-validate the scope and proposal.

Techniques:
- Group checkpoint with the team
- Coordinate with Integrated Engagement Leadership, who owns the project plan
- Process planning

Team members involved:
- Entire team

Length of activity:
- One to two days

Step 2 deliverables

Note: All deliverable examples discussed in this section can be found on the Sapient network at \\webteam\information_architecture\deliverables

Summary of findings   Activity D: Establish project context and focus

🔴 IA partly owns

Summary of findings is the synthesis of information gathered from various methods—such as interviews, review of documentation and research—into simple and clear explanations. The level of detail of the findings will vary based on what is appropriate for the client and the project. The findings are typically integrated into team deliverables and presentations.

Overview

Purpose	• Identify the key findings from the IA perspective • Communicate the findings to both the team and client
Audience	• Client
Major components	• Explanation of where the information came from • Unique high-level findings • Examples (either written or visual) to help communicate and explain the findings

Internal IA education materials   Activity E: Develop process and revise scope

🔴 IA owns

These are definitions, explanations, and examples from the Information Architecture practice to help the team better understand the value of IA at Sapient. The internal education materials can be generic or customized for the specific project and can be used throughout the project to help articulate the Information Architecture perspective and give context to a problem or solution. Internal educational materials are particularly useful in situations when team members do not understand the role of IA or purpose of IA deliverables.

Overview

Purpose	• Communicate the definition and value of the IA practice and process • Support and help the team understand proposed solutions and recommendations • Educate the team on how IA relates and collaborates with other disciplines and practices • Build a stronger, collaborative relationship with other team members
Audience	• Internal team
Major components	• Stated problem or solution • Explanation or definition • Example
Supporting activities	• Team meetings • Team project planning
Recommended steps	• Identify the key issues and concerns that need to be addressed • Write or diagram the explanation that includes an

	example to help illustrate the point
Doneness criteria	• When all of the team's questions and concerns have been adequately addressed by the materials

Project plan

Activity E: Develop process and revise scope

🔴 IA partly owns

The project plan includes the team process plan, schedule and revised proposal (if necessary). These documents provide the high-level overview of the project and together outline the various tracks of work for each practice, milestones, deliverables, and dependencies on a project. Initially, the team uses the project plan to estimate project costs and resourcing. During the project, the team used the team process plan and schedule to better understand how major changes may affect the delivery date, and to communicate with and manage the client. The team process plan and schedule may be updated several times throughout the life of a project.

Overview

Purpose	• Integrate the team process plan into the project plan • Define the dependencies and risks • Inform, review, and approve the team process plan
Major components	• Revised proposal (as needed) • Team process plan • Schedule, timeline with milestones • Practice tracks • Activities and tasks for each track • Deliverables • Dependencies • Points of client contact, collaboration, and presentation

Team process plan

Activity E: Develop process and revise scope

🔴 IA partly owns

The team process plan is an outline of activities that describes how the team will do work at each step in the project in order to reach the defined goals. It shows the deliverables that will be generated from those activities, time estimates, and resources for the project. The team process plan will be included in the project plan, which also includes a time schedule, project costs, and a revised proposal if needed. The team process plan is a starting point for the various disciplines and practices represented on the team to better understand how they will need to work together and what dependencies and overlaps may exist between them. This plan is reviewed and refined at the beginning of each discrete step of the project.

Overview

Alternative names	• Level of effort estimation
Purpose	• Formulate an overall process plan for a project • Determine the Information Architecture activities, deliverables, team work sessions, resources, time estimates, and cost for a project • Identify points of collaboration and dependencies between the disciplines and practices, indicating where each needs information from the other in order to complete deliverables • Identify potential staffing conflicts with other projects • Identify risks and assumptions
Audience	• Internal team
Major components	• IA high-level activities and deliverables along a timeline • Resource needs • Estimated time for completion or level of effort • Dependencies and risks • Assumptions and issues
Supporting activities	• Team planning meetings • Information Architecture planning meetings • Reviewing other plans and estimates • Sketching or diagramming the process
Recommended steps	• Define time frame • Define scope items • Identify issues, risks, dependencies, and assumptions • Estimate time for each task by person day/week • Review plan with team and Project Manager (PM) • Update plan as project progresses and changes
Contributors	• Coordination with other disciplines that share dependencies with IA • Coordination with PM who manages the project plan and estimations
Software	• MS Excel • MS Project • MS Word • Adobe Illustrator
Doneness criteria	• Plan has been confirmed by team • All issues, assumptions, and risks have been identified • All open questions have been resolved • Reviewed by experienced team members and senior managers
Examples	• IA Estimation document • SpringStreet team process schedule • Shaklee team process design

Example 1: IA Estimation document (Cambridge)

Audience	• Internal team
Unique steps	• Template is modified to represent the specific project. Activities are added or removed. • IA evaluates each activity to size and scope the project
Software	• MS Excel
Path and filename	• \2_context_scope\ia_project_plan\examples\iaesti mation_unisource_cam.pdf

Example 2: SpringStreet—Team process plan and schedule (San Francisco)

Unique purpose	• Provides description of the roles and responsibilities of each discipline on the team
Audience	• Internal team
Unique steps	• Meet as an entire team to discuss project milestones, team involvement, and activities to accomplish deadlines • Determine role, responsibilities, and dependencies of each team member • Document and distribute to team for approval
Notes	• More time consuming to create in non-MS Project application but allows for more flexibility and for information to be presented • Constructed as a process roadmap that was effective for communicating to the team, facilitating discussion, and getting feedback
Software	• Adobe Illustrator
Path and filename	• \2_context_scope\ia_project_plan\examples\proce ssplan_springstreet_sf.ai

Example 3: Shaklee—Team process design (San Francisco)

Unique purpose	• Provides a description of the activities that outline how the team will do their work for each step of the process • Identifies the deliverables that are generated from each of the activities • Maps the team activities to the parts of the business plan deliverables
Audience	• Internal team • Client
Software	• Adobe Illustrator • Later translated into MS Excel
Path and filename	• \2_context_scope\ia_project_plan\examples\proce ssplan_shaklee_sf.ai

⬭ IA inputs / consents

The strategy document contains the team's high-level findings, recommendations, and next steps. It also outlines the high-level approach for future projects and or project phases. The strategy document helps the team and client come to an agreement on the direction of the relationship and the project.

Overview

Purpose	• Provide strategic recommendations to the client on how to proceed with positioning their business • Visually and textually document the strategy findings and recommendations to be better understood by the client and the internal team • Contribute to the exploration and definition of recommendations by the team
Audience	• Client
Major components	• High-level findings • Recommendations • Next steps

Entry criteria
- client knowledge transfer completed
- client expectations + drivers defined
- list of clear objectives obtained from client
- critical success factors defined
- statement of client's vision written
- identify goals for focused research
- IA time and cost estimate
- project plan that consists of:
  - revised proposal (as needed)
  - team process plan
  - project schedule
- **client consensus and sign-off**

F Conduct focused research
G Synthesize info
H Define problem

definition document

Exit criteria
- finding/models generated from research
- user audiences + needs identified
- current state analysis completed
- business problem defined
- client technical capabilities assessed
- areas of opportunity identified
- recommendations made for solutions
- brand strategy assessed
- content strategy assessed
- reconciliation made with objectives and vision
- (high-level) features identified
- package selection criteria established
- technical benchmark established
- **client consensus and sign-off**

Step 3: Synthesize variables. Define the problem and opportunities.

Step 3 overview

During this step, the project team synthesizes the results from focused research to define the business problem and opportunities, gets information required to proceed with the OTA Concept phase, and provides recommendations on moving forward.

Key goals:
- Identify the business model for the solution
- Identify all client business requirements
- Define key success criteria
- Validate and further define the demographics of the target audience
- Define user types by understanding differences in users' goals, needs, and work processes
- Understand the client's current state
- Define best practices for solutions to similar business problems
- Identify the client's knowledge transfer needs (will they be managing the solution in the future?)

Key activities:
- F. Conduct focused research
- G. Synthesize information
- H. Define the problem
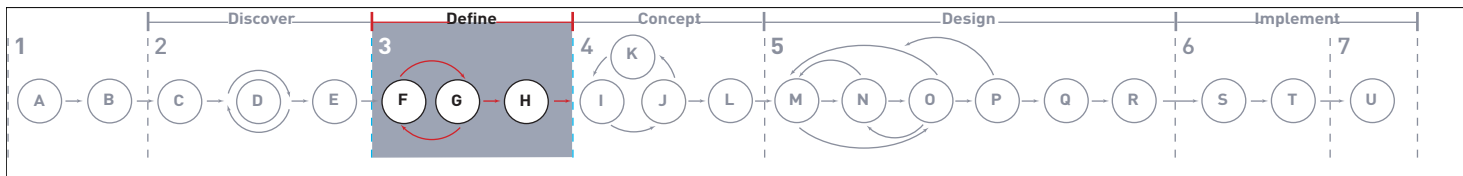
Key interactions with other team members:

- Work with Digital Business Strategy to research business models, drivers, industry, and the competition
- Work with the Creative practices to perform a brand assessment, content assessment, current state analysis, and to investigate key areas identified in the previous step (step 2)
- Work with XMOD to define and understand the users and their needs
- Work with Technology to understand in detail the systems with which we will interact in building our solution, as well as the packages that are being considered

Deliverables by activity:

- F. Conduct focused research
  - Current site map ●
  - User experience audit ◐
  - Current site audit ◐
  - Competitive audit ◐
  - Package selection criteria ○
- G. Synthesize information
  - Informational diagram ◐
  - User audience model ◐
  - User task models ◐
  - User profiles ◐
  - User scenario ◐
  - Secondary research findings ◐
  - Executive interview findings ◐
  - Package evaluation document ○
- H. Define the problem
  - High-level feature list ●
  - Definition document ○

Length of step:

- Three to eight weeks depending on scope and complexity

Step 3 activities

F. Conduct focused research

The team uses the information gathered from the client in step 2 as the starting point for focusing their own in-depth research. The purpose of this focused research is to gain a clear understanding of the business problem, identify who the audiences are, and evaluate the technology that will be used. With a clear understanding of the current state, teams can better identify where the opportunities are for client solutions. Focused research may include the following: research into the client's current Web presence, competition, industry best practices, business model, operational readiness, technology infrastructure, and the target user audiences and their needs, desires, and behaviors.

These investigations most often take the form of systematic audits against set criteria, the results of which are frequently documented as part of the definition document.
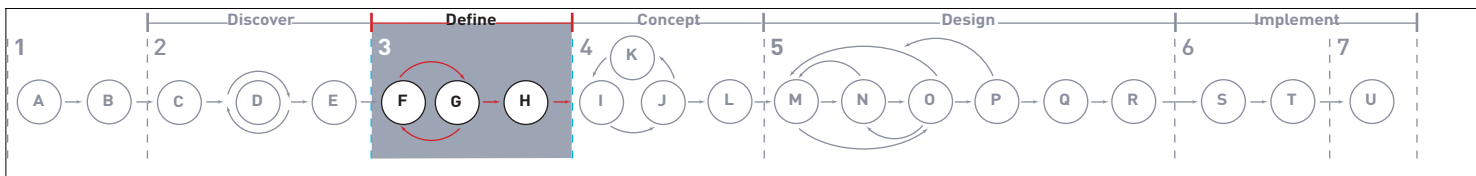
Techniques:

- Workshops
- One-on-one client interviews
- Conference calls
- User interviews
- User research
- Site visits
- (Web) site audits
- Meetings
- Review of existing collateral or products
- Review of existing studies and reports

Team members involved:

- IA
- XMOD
- Digital Business Strategy
- Technology
- Content Strategy
- Graphic Design
- Brand Strategy

Length of activity:

- One to six weeks depending on the complexity of the project

G. Synthesize information

IAs participate with the rest of the team in conducting the research in the previous activity. Once information has been gathered, the IA plays a key role in helping the team to synthesize information into findings and models that can be easily understood.

These findings and models are textual and visual ways of describing the relationships, patterns, priorities, and conflicts between the various pieces of information that have been gathered. The results of this synthesis illustrate the client's business situation, the target users, and the technology systems upon which the solution will be built.
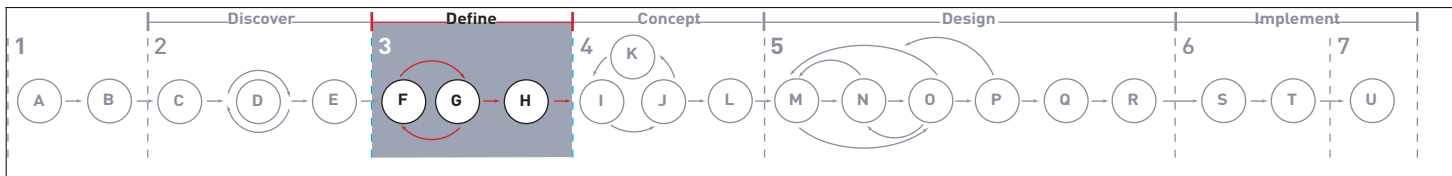
Techniques:

- Task modeling
- Scenario writing
- Business case development
- Affinity mapping
- Matrices
- Needs prioritization
- Visual modeling of information
- Bubble diagramming
- Group discussion (brainstorming)

Team members involved:

- Entire team

Length of activity:

- One to three weeks

H. Define the problem

The purpose of this activity is to look for areas where user needs, business requirements, and technology capabilities intersect. Using the findings and models generated in the previous activity, the team attempts to reconcile these three areas. This reconciliation process should result in areas of opportunity.

The areas of opportunity are then validated against the project objectives and vision that were established during the context and focus activities of step 2. These should be used as the basis for preliminary recommendations of a solution, which is communicated in the definition document, provided to the client as a culmination of our activities in the OTA Define phase. The definition document includes the synthesized results of our focused research and a clear indication of how the solution will be developed in the next phase of work.

The client must sign off on the definition document.

Techniques:

- Very thorough documentation
- Diagramming
- Visual modeling
- Mediation between team members
- Brainstorming of new ideas

Team members involved:

- Entire team

Length of activity:

- Two to four weeks (includes one to two weeks for editing and production of Definition Document)

Step 3 deliverables

Note: All deliverable examples discussed in this section can be found on the Sapient network at \\webteam\information_architecture\deliverables

Current site map   Activity F: Conduct focused research

● IA owns

The current site map is a high-level or detailed view of the existing Web site or application, including its organization, content, functionality, and the relationships between all three. Current site mapping, combined with an in-depth content inventory, provides the team with an understanding of the size of the current site and any major issues. This helps the team scope and plan a project. It also allows the team to better understand who the client is and what the client's needs are. The current site map is typically part of the current site audit. The level of detail on a current site map can vary depending on the specific purpose of the mapping.

Overview

Alternative names	• Landscape, site model, site map
Purpose	• Understand the current site structure and organizational schema • Understand current information architecture/design systems • Assess current content and functionality offerings • Assess types of content (e.g., dynamic vs. static) • Assess relationships with other sites connected to the site • Assess the size of a site • Help define and validate problems • Help identify new problems • Help define base criteria for new ideas • Define existing user audience and tasks • Provide support for the findings and recommendations that are included in the definition document
Audience	• Internal team • Client
Major components	• Names of site sections • Screens • Information and screen hierarchy • Identification of content types • Identification of functionality types (e.g., forms, search, etc.) • Identification of user audiences and tasks • Screen counts • Identification of internal/external links
Supporting activities	• Review of the current site and/or application
Recommended steps	• Define the purpose of the mapping • Select a method or tool for documenting • Identify and map major components

	• Call out key findings on the map • Compare findings and map with team members
Software	• Microsoft Word • Microsoft Excel • Visio • Adobe Illustrator • Web crawling tools (e.g., Web Coast, Visio)
Contributors	• Site developer
Doneness criteria	• Entire site is documented • Findings are articulated
Examples	• HP ECS—Current site map • iQVC—Current site map

Example 1: HP ECS—Current site map (San Francisco)

Unique purpose	• Identify different content categories (e.g., FAQs, Support, and Registration) and content types (e.g., developer-oriented or marketing-oriented) on HP.com and its competitors' sites. Also to visually show the relative size of each content category so that the client understands the amount of content they need to create for the site.
Audience	• Client
Time frame	• One day for each model (very aggressive)
Unique steps	• Conducted high-level assessment of each content category, which were each three levels deep (the assessment did not cover in-depth functionality)
Software	• Adobe Illustrator
Unique contributors	• Content Strategy
Path and filename	• \3_synthesize_define\current_site_map\examples\ siteassessmap_hpeservices_sf.pdf

Example 2: iQVC—Current site map (New York)

Unique purpose	• Identify and document the entire iQVC online offering at the time of the audit • Indicate current content and functionality, its organization and hierarchy in the site • Show how many ways and how long it took for users to get to a product
Audience	• Internal team • Client
Time frame	• Two days
Software	• Visio
Unique contributors	• Entire team
Path and filename	• \3_synthesize_define\current_site_map\examples\ currentsitemap_iqvc_ny.pdf

🔴 IA partly owns

The user experience audit is a document that contains the findings and analysis about the client's current offerings. Current offerings can include online and offline sites and applications, information, collateral, and multi-channel experiences in which users interact with the client. A current site audit is done to better understand the product and service offerings, business and user interface issues, and the needs of the client and their customers. Each member of the audit team analyzes the sites from a different perspective. Practices and disciplines consolidate findings where possible.

Overview

Alternative names	• Current state audit, Web audit, user/content/product audit
Purpose	• Identify and understand the problems with the current Web site in context with the overall user experience • Gain context and understanding of client's strategy and positioning in their industry • Identify user audiences and their needs • Understand how existing solution addresses the client's business problem and drivers, the initial audience segment identification, baseline user expectations, and key user needs • Understand the size and scope of offering by defining the types of content, functionality, and interactions • Evaluate technology platforms and site connectivity • Document opportunities, recommendations, best practices, and pitfalls, all of which may inform the team's future work • Set baseline criteria for competitive audits and to evaluate new ideas • Provide support for the findings and recommendations included in the definition document
Audience	• Internal team • Client
Major components	• Criteria for evaluation • Findings grouped by criteria • Current site map • Examples that illustrate findings • Recommendations and opportunities
Supporting activities	• Review of the current site and/or application • Research on client offerings
Recommended steps	• Determine goals or objectives for the audit • Define the evaluation criteria to meet these objectives • Identify audit team and roles • Create template for audit findings

	• Review business artifacts per the evaluation criteria • Include following IA criteria: organization and paradigms, navigation, content types, usability and value of features • Compare goals of business environments • Review data identifying user audiences and user tasks, and overall experience • Document findings • Review audit findings with team members • Consolidate findings into single document
Software	• Microsoft Word • Microsoft Excel • Visio • Adobe Illustrator • QuarkXPress
Contributors	• Selected members of different practices
Doneness criteria	• Findings are consolidated and documented • Team is able to defend conclusions
Examples	• Kodak—User experience audit • Xerox—Content and product matrix

Example 1: Kodak—User experience audit (San Francisco)

Unique purpose	• Combine extensive competitive audit with an in-depth audit of the interaction between Kodak's current users and all aspects of Kodak's products and services (both offline and online) • Provide client with full picture of the competitive landscape in existing markets and new markets • Educate client on what makes a good user experience by first introducing criteria then completing an audit of Kodak and its competitors against those criteria
Audience	• Entire Kodak organization (size and reach of audience determined online format)
Time frame	• Five weeks
Unique steps	• Deliverable was designed to be a Web site (building it meant the team completed a mini version of a traditional Web design project) • Online site built to present an interactive report • Deliverable translated into a printed document after being delivered in Web format
Format	• HTML
Unique contributors	• Content Strategy • Site Development
Path and filename	• \3_synthesize_define\current_site_audit\example\ userexperienceaudit_kodak_ny\ index.html • \3_synthesize_define\current_site_audit\example\ userexperienceaudit_kodak_ny\gettingthere3.0.a\ index.html

Example 2: Xerox—User/Content/Product matrix (San Francisco)

Unique purpose	• Define product-related user types and identify individual audiences within each user type • Present comprehensive list of content, functionality, and products currently offered on Xerox.com and organize by major categories • Map current content/products to specific user types who would find it the most valuable • Suggest additional content/products that would be appropriate to specific user types based on user research findings and knowledge about users, business objectives, and competitive offerings
Audience	• Internal – reference for current offerings • Client – validation of what is currently available and suggestions for additions
Notes	• Good information design allowed deliverable to present information in layers and not overwhelm the audience • Matrices typically did not allow for very detailed or explanatory information
Software	• Comparison matrix built in Adobe Illustrator (allows for a quick view of many diverse types of information and their relationship to each other)
Path and filename	• \3_synthesize_define\information_diagrams\examples\siteaudit_xerox_sf.ai

Current site audit   Activity F: Conduct focused research

🔴 IA partly owns

The current site audit is a document that contains the findings and analysis about the client's current Web presence. Unlike a user experience audit, which focuses on the whole customer experience online and offline, a current site audit is concerned only with the client's existing Web presence(s). A current site audit is done to better understand product and service offerings, business and user interface issues, and the needs of the client and their customers. Each member of the audit team analyzes the site from a different perspective. Practices and disciplines consolidate findings where possible.

Overview

Alternative names	• Current state audit, Web audit
Purpose	• Identify and understand the problems with the current Web site in context of the overall user experience • Gain context and understanding of client's strategy and positioning in their industry • Identify user audiences and their needs • Understand how existing solution addresses the client's business problem and drivers, the initial audience segment identification, baseline user

	expectations, and key user needs • Understand the size and scope of offering by defining the types of content, functionality, and interactions • Evaluate technology platforms and site connectivity • Document opportunities, recommendations, best practices, and pitfalls, all of which may inform the team's future work • Set baseline criteria for competitive audits and to evaluate new ideas • Provide support for the findings and recommendations included in the definition document
Audience	• Internal team • Client
Major components	• Criteria for evaluation • Findings grouped by criteria • Current site map • Examples that illustrate findings • Recommendations and opportunities
Supporting activities	• Competitive audits
Recommended steps	• Determine goals or objectives for the audit • Define the evaluation criteria to meet these objectives • Identify audit team and roles • Review the site per the evaluation criteria • Include following IA criteria: organization and paradigms, navigation, content types, usability and value of features • Compare goals of site to actual site • Review data collected from the site, identifying user audiences and user tasks, and overall experience • Document findings • Review audit findings with team members • Consolidate findings into single document
Software	• Microsoft Word • Microsoft Excel • Visio • Adobe Illustrator • QuarkXPress
Contributors	• Selected members of different practices
Doneness criteria	• Findings are consolidated and documented • Every page in the site is accounted for • Team is able to defend conclusions
Examples	• Vitamin Shoppe—Current site interaction model

Example 1: Vitamin Shoppe—Current site key findings/interaction model/ navigation assessments (Atlanta)

Unique purpose	• Present recommendations and findings about the current site • Assess key areas of the site to visually show how users navigate, to show what works and what doesn't, and to make recommendations
Audience	• Client
Time frame	• Four week Definition phase • Two to three weeks for IA analysis and documentation (very aggressive)
Unique steps	• Deconstructed main areas of interaction on current site and identified key activities in each area • Identified complex or critical activities, and analyzed and documented how they happen on the site • Highlighted potential problems and ways to improve
Software	• Original charts were created in Visio then translated into QuarkXPress for compilation into the definition document
Path and filename	• \3_synthesize_define\current_site_audit\example\i aassessment_vitaminshoppe_atl.pdf

Competitive audit   Activity F: Conduct focused research

🔴 IA partly owns

The competitive audit describes the best practices in a market segment and conveys our understanding of how the solution we may be providing for the client would be positioned in a competitive market. The findings from this audit can be used to set benchmarks for functionality and content, which can also serve to evaluate future designs. A competitive audit is particularly useful when the client and team are unsure of market offerings and best practices. Competitive sites are defined as either sites that offer similar products or services (direct market competition) or sites that have similar functionality or content (best-of-breed offerings, indirect competition).

Overview

Alternative names	• Competitive feature matrix, best practice audit
Purpose	• Understand the current market and best-of-breed offerings • Educate and communicate opportunities, best practices, and pitfalls, which may inform the team before moving forward • Provide support for findings and recommendations included in the definition document
Audience	• Client • Internal team
Major	• Criteria for evaluation

components	• Findings grouped by criteria • Examples that illustrate findings • Recommendations, opportunities, and lessons learned
Supporting activities	• Review of sites, applications, retail environments, and related service offerings
Recommended steps	• Determine goals or objectives for the audit • Define the evaluation criteria to meet these objectives • Identify audit team and roles • Create template for audit findings • Review the site based on the evaluation criteria • IA criteria of the client offerings includes: organization and paradigms, navigation, content types, usability and value of features • Compare goals of site to actual site • Review data collected from the site, identifying user audiences and user tasks, and overall experience • Document findings • Review audit findings with team members • Consolidate findings into single document
Software	• Microsoft Word • Microsoft Excel • Visio • Adobe Illustrator • QuarkXPress • HTML
Contributors	• Each discipline and practice reviews the same set of sites but uses different evaluation criteria
Doneness criteria	• Findings are consolidated and documented • Document demonstrates an understanding of the issues • Team is able to defend conclusions
Notes	• Web-based competitive audits have been used successfully in past projects
Examples	• Smith and Noble—Competitive audit • Vitamin Shoppe—Competitive interaction assessments • SpringStreet—Best-of-breed audit

Note: The desirability and usefulness of a site can be determined by understanding how the client business problem and drivers, initial audience segments, baseline user expectations, and key user needs are currently being met by competitive offerings. Performing a heuristic, evaluation of site design, navigation, and other interactive elements can also assess the inherent usability of a particular site and its features.

Example 1: Smith and Noble competitive audit (Cambridge)

Audience	• Internal team • Client
Software	• Detailed written reviews written in MS Word • Written audit supported by overview presentation in MS Power Point and screen shots of competitive sites
Path and filename	• \3_synthesize_define\competitive_audit\examples\ companalysis_smithnoble_cam.pdf

Example 2: Vitamin Shoppe—Competitive interaction assessments (Atlanta)

Unique purpose	• Visually show the number of steps competitive sites take to accomplish key activities identified in the current site audit (Sell, Inform and Purchase) • Provide easy way of comparing competitive sites to the current site based on set criteria
Audience	• Internal team • Client
Time frame	• Four-week Definition phase • IA analysis and documentation took two to three weeks
Unique steps	• The structure and nomenclature of user activities that was established in the in-depth analysis of the current site is used as comparison criteria
Software	• Final charts were built in Adobe Illustrator • Visual layout of screens is very clear but time consuming to build and limits amount of information that can be communicated
Path and filename	• \3_synthesize_define\competitive_audit\examples\ compinteraction_vitaminshoppe_atl.pdf

Example 3: SpringStreet—Best-of-breed audit (San Francisco)

Unique purpose	• Rank services provided by competitor in terms of helpfulness • Quickly identify best-of-breed offerings rather than best-of-breed competitor
Unique steps	• One-page matrix with color coding allowed quick assessment of offerings and their relative ranking
Software	• Comparison matrix built in Adobe Illustrator
Path and filename	• \3_synthesize_define\competitive_audit\examples\ compaudit_springstreet_sf.xls

Package selection criteria   Activity F: Conduct focused research

⭕ IA inputs / consents

Package selection criteria consist of requirements that guide the selection of software and hardware technology used to implement the project. This list is usually prepared by the Technology team during business design activities. The criteria outlined in this document are derived from client business requirements and the specifics of the solution that is being proposed. Information Architecture informs this document by working closely with the Technology team to convey the anticipated functionality of the final solution, specifically from a front-end interaction standpoint.

Overview

Purpose	• Establish measurable criteria for the evaluation of software packages
	• Document client business requirements for software packages
Audience	• Client

Informational diagrams   Activity G: Synthesize information

◐ IA partly owns

An informational diagram is a visual tool that communicates data in a visual and easy-to-understand manner. Informational diagrams are used to express complex ideas and multiple levels of information often in a single diagram. Informational diagrams can be used whenever the team and/or client need to see an illustration of an idea to better understand it.

Overview

Alternative names	• Information graphics
Purpose	• Visually communicate a complex idea or problem
	• Show information types, relationships, and flow
Audience	• Internal team
	• Client
Major components	• Visual elements
	• Visual links made between elements
	• Description of model
Supporting activities	• Brainstorming
	• Synthesis of findings
Recommended steps	• Identify the elements and types of information
	• Sketch out different ways of representing the elements, ideas, or findings
	• Visually prioritize the key elements of the model
	• Call out and describe the key attributes of the model
	• Review with the team
Software	• Adobe Illustrator
	• Visio
	• QuarkXPress
Contributors	• Content Strategy
	• Graphic Design

	• Brand Strategy
	• Digital Business Strategy
Doneness criteria	• Findings are consolidated and documented
	• Document demonstrates an understanding of the issues
Examples	• SpringStreet—e-business model
	• IBM Sybil—II-Informational diagram
	• Shaklee—Business landscape

Example 1: SpringStreet—E-business model (San Francisco)

Unique purpose	• Visually demonstrates the business model, where revenue streams are coming from, and identifies opportunities for retaining the customer
	• Shows how to extend the product offering
Audience	• Internal team
	• Client
Timeframe	• 4 days
Software	• Adobe Illustrator
Unique Contributors	• Brand Strategy
Path and filename	• \3_synthesize_define\information_diagrams\examples\ecommodel_springstreet_sf.pdf

Example 2: IBM Sybil II—Informational diagram (New York)

Unique purpose	• Evaluate all individual IBM Web sites
	• Use as a tool and a model to communicate findings
Audience	• Client
Timeframe	• 2 weeks
Unique steps	• The criteria and evaluation template were created
	• Sites reviewed using evaluation criteria
	• Findings were reviewed by the team
	• Each Web site was rated based on findings
	• Models added to strategy document
Software	• Illustrator
	• QuarkXPress
Unique contributors	• Content Strategy
	• Integrated Engagement Leadership
Path and filename	• \3_synthesize_define\information_diagrams\examples\assessment_ibmsybil_ny.pdf

Example 3: Shaklee—Business landscape (San Francisco)

Unique purpose	• Show areas of potential content and functionality for a non-existing Web site (www.Shaklee.com) and use as a tool for the team to generate new ideas
	• Generate a staged plan for the development of a Web site and product releases
Unique steps	• Emerged during the synthesis of focused research
	• Based on findings about the industry and a

	competitive audit
Unique contributors	• Digital Business Strategists who conducted the research
Path and filename	• \3_synthesize_define\information_diagrams\exam ples\3phasediagram_shaklee_sf.pdf

User audience model   Activity G: Synthesize information

🔴 IA partly owns

User audience models document target audiences for the end solution. Typically Information Architects and Experience Modelers distill an audience model in the define phase from analysis of secondary research, executive interviews, and field research. When there is more than a single audience, the model can also be used to show interdependencies and interactions between different audience segments.

Overview

Purpose	• Understand the audience needs and motivations • Analyze how activities differ among unique audiences • Understand dependencies and relationships between audiences • Understand audience failure points or stresses to identify opportunities
Audience	• Internal team
Major components	• Audience type and description • Audience needs • Points of audience relationships • Value of product offering to each audience • Primary interaction and relationship with product offering
Supporting activities	• User research • Contextual research
Recommended steps	• Review/observe research interviews or surveys • Review user profile and scenarios • Documents goals, motivations, or needs • Document specific high-level tasks • Identify key value of product offering for each audience • Identify relationship between audiences
Software	• Illustrator • Visio • MS Word
Contributors	• XMOD • Graphic Design • Content Strategy
Doneness criteria	• The team understands each audience and how it relates to other audiences • The model expresses the value of the product offering to each audience • Users, internal team, and client have validated
Examples	• Shaklee—audience model

Example 1: Shaklee—Audience model (San Francisco)

Unique purpose	• Identifies the information dependencies between the audiences • Identifies the differences in the information needs of all of the audiences at a high level
Software	• Illustrator
Unique contributors	• Information Architecture • XMOD • Digital Business Strategy
Path and filename	• \3_synthesize_define\audience_model\examples\audiencemodel_shaklee_sf.eps

User task models   Activity G: Synthesize information

🔴 IA partly owns

Task models are tools used to document the habits and working patterns of users. Typically Information Architects and XMOD will distill task models from data collected during interviews and research. Task models can differ in the level of information they convey. High-level task models show the set of activities that a user completes to achieve a goal. However, an individual activity can be comprised of many tasks, so a low-level task model shows the specific tasks done to complete an individual activity. High-level task models also show the relationships between different activities and user motivations, while low-level task models provide insights into task sequencing and begin to document interactions with the technical infrastructure. The level of detail in a user task model is determined by the amount of information that is available from user research.

Task models are created in earlier phases to document what is known about the users then modified later in the design process to document the functionality of a site design (process flows).

Overview

Alternative names	• Process model, activity model, task analysis
Purpose	• Understand the user's activities at a detailed level and examine the relationships between tasks • Analyze how activities differ among user types and thus how people work differently • Understand dependencies between different users and various areas of a site or information • Understand user failure points or stresses to identify opportunities • Define supporting information or materials that users need to complete a task • Define opportunities
Audience	• Internal team
Major components	• User goals or needs • Types of work • List of unique tasks • Identification of task dependencies

	• Documentation of task variances by different user types
Supporting activities	• User research • Contextual research
Recommended steps	• Review/observe research interviews or surveys and translate how users work through high-level tasks • Document user goals, motivations, or needs • Document specific high-level tasks • Determine how tasks are related and the sequence of each • Identify low-level tasks associated with each high-level task • Determine if tasks are performed differently by different types of users
Software	• Adobe Illustrator • Visio • MS Word
Contributors	• Experience Modeling • Graphic Design • Content Strategy
Doneness criteria	• The team understands each task and how it relates to other tasks • All tasks necessary to meet user goals, motivations, and needs are documented • The sequence of tasks is defined • Users, internal team, and client have validated the task models
Examples	• SpringStreet—Character model • SpringStreet—Task analysis • First Union—Areas of work/activity model/task model

Note: The relationship between user task models and technical use cases still needs to be determined, but the information contained within each is similar and should be leveraged as much as possible.

Example 1: SpringStreet—Character model (San Francisco)

Unique purpose	• Document individual tasks completed by a user type to accomplish a goal (finding a new apartment) • Map tasks with outside events or "triggers"--stresses encountered along the way that will affect the user's experience--and information needed to complete specific tasks
Software	• Adobe Illustrator • MS Word
Path and filename	• \3_synthesize_define\task_models\examples\char model_springstreet_sf.xls

Example 2: SpringStreet—Task analysis (San Francisco)

Unique purpose	• Map individual tasks and activities to a tool or site feature and rank those tools by user preference • Show where user needs are not being addressed or where new features are warranted
Software	• Textual list built in Adobe Illustrator or MS Excel allows for detailed information about each task
Path and filename	• \3_synthesize_define\task_models\examples\task model_springstreet_sf.doc

Example 3: First Union—Areas of work/activity model/task model (Atlanta)

Unique purpose	• Drill down to task-level analysis of each activity while documenting cross-sell opportunities and informational needs • Determine variances in user types by analyzing differences in work and task patterns
Audience	• Internal team • Client
Time frame	• Four-month Define phase • High-level task models took 3-5 days to synthesize after first round of interviews • Low-level task models took one week after second round of interviews
Unique steps	• First round of user interviews focused on users' current activities and got feedback on an established set of features supplied by the client • High-level task models were synthesized from first round interviews and served as the basis for in-depth validation questions asked in second round of interviews • Synthesis after second round of interviews revealed that similar tasks were accomplished differently by users. This allowed the team to determine user profiles.
Software	• Original diagrams were created in Visio then transferred to QuarkXPress for the definition document
Path and filename	• \3_synthesize_define\task_models\examples\task model_fub_atl.pdf

🔴 **IA partly owns**

User profiles represent characteristics, life context, demographic and psychographic information, and business relationships of individual users or a composite of multiple users. User profiles address the need to understand the specific attributes of the target audience. The profiles are based on real people who have been observed using different ethnographic techniques. (If a project does not provide the opportunity to observe real people, a project team should brainstorm to develop fictional user profiles based on known characteristics of real users.) Each profile, often referred to as a "character," is used as a reference point throughout the course of a project—to develop concepts, design the interface, and conduct design testing.

Overview

Alternative names	• Character map • Character profile
Purpose	• Understand target audience • Get into the minds of end users • Describe how users are different from one another • Understand user motivations, work styles • Represent who we are designing for • Develop reference points for role-playing, building user scenarios, creating task models, and exploring interaction flows • Guide selection of concept, design, and usability testing subjects • Guide creation of concept, design, and usability testing tasks • Provide support for all user research activities • Bring the real world into the design process
Audience	• Client • Internal team
Major components	• User name • User type • User background • Demographic information: age, gender, occupation, household income, etc. • Life context: interests, skills, goals, wants/needs, Internet use, personal environment • Project-based information: role name, role description, tasks/activities • The user's relationship to the client's business, Web site(s), service(s) and/or product(s) • Other project-specific information
Supporting activities	• User research • Reviewing marketing data
Recommended steps	If, at this point in the project, user research has NOT yet begun, start here: • Define targeted audience groups • Get descriptions of target audience groups and

	target market data
	• Describe representative individuals from each audience group
	• Brainstorm about who they are based on set criteria
	• Validate the information with client
	If user research has been conducted, start here:
	• Analyze and synthesize the user research findings
	• Define appropriate profile components
	• Map the user information against the profile components
	• Present the document to project team for review and validation
	• Validate the information with client
Software	• MS Word
	• MS Excel
	• Adobe Illustrator
	• Visio
Contributors	• XMOD
	• Content Strategy
	• Brand Strategy
Doneness criteria	• Each user has been represented in one of user types
	• User profiles have been validated with users and/or client
Examples	• Electronic Arts—Character maps
	• First Union—User profiles
	• HP Common Log-in—User profiles

Example 1: Electronic Arts—Character maps (San Francisco)

Unique purpose	• Identify key target audiences and provide relevant demographic information for each
	• Identify (in first-person format) how the user type would interact with the site, how they would react to key areas (Learn, Play, and Communication), and how they would exit the site
Audience	• Internal team
	• Client
Software	• Adobe Illustrator
Path and filename	• \3_synthesize_define\user_profile\examples\userp rofile_ea_sf.pdf

Example 2: First Union—User profiles (Atlanta)

Unique purpose	• Identify the different user types based on their motivations, how they work, and their needs
	• Determine information needs required by each user type
Audience	• Internal team
	• Core client team
Time frame	• Four-month Define phase

Unique steps	• Synthesis of the low-level task models allowed teams to isolate differences in user types, how they worked, and what information they needed • Knowledge about product offerings also allowed the team to identify cross-sell and up-sell opportunities for each user type
Software	• Visio
Unique contributors	• Experience Modeling • Content Strategy • Graphic Design
Path and filename	• \3_synthesize_define\user_profile\examples\userprofile_fub_atl.pdf

Example 3: HP Common Log-in—User profiles (San Francisco)

Unique purpose	• Understand detailed behaviors of users in a Web log-in and registration context
Audience	• Client
Time frame	• One week
Unique steps	• Planned agenda for week-long user research analysis session • Identified common attributes of 60 users • Identified users' specific/general use of the Internet for personal/professional purposes • Identified sub-attributes within each defined user attribute • Created "fun" names that described the attributes—names became user types • Map all the users into user types
Software	• Excel for raw data • QuarkXPress for client presentation
Unique contributors	• XMOD
Path and filename	• Not currently available

User scenarios

Activity G: Synthesize information

🔴 IA partly owns

User scenarios combine the user profile with the task model to show how a representative user type might interact with a site and other business artifacts to meet his or her specific needs. User scenarios are either conceptual explorations that explain how interactions might differ between users, or they are an articulation of user research findings that explain a user's interaction with the current site or other business artifacts. User scenarios allow the team to model data collected during user research. These scenarios can be used throughout the design process.

Overview

Alternative names	• Character models • Note: Do not call these deliverables "use-case scenarios"
Purpose	• Communicate the ideal ways for users to achieve goals • Capture real user interactions with site • Communicate users' motivations and behaviors • Identify weaknesses and opportunities in the current user scenario(s) • Inform all task-modeling activities and concepting
Audience	• Client • Internal team
Major components	• Context for each user • User name • User characteristics as they relate to this project • User tasks and motivations • Narrative of the user's activities on the still fictional Web site
Supporting activities	• User research
Recommended steps	• Get user profile (ideally from user research or XMOD) • Identify scenario topic(s) with client • Gather user input • Walk through initial scenario(s) with client • Document scenario • Activities should match real world situations and should be validated by XMOD • Interactions should represent technically feasible features • Test scenario with representative sample of user types • Revise scenario(s) based on user feedback • Review with client
Software	• MS Word • Adobe Illustrator • MS PowerPoint • Visio
Contributors	• Client • XMOD • Other Creative practices • Technology
Doneness criteria	• Scenarios validated by actual user activities and other user research • Client sign-off received
Examples	• SpringStreet—User scenarios • Xerox—User scenarios

Example 1: SpringStreet—User scenarios (San Francisco)

Unique purpose	• Identify where revenue would be generated in the site and how it fits into the user's experience
Unique steps	• User activities represented as individual tasks mapped against areas of the site • Narrative description of scenarios tied visual elements together
Software	• Adobe Illustrator
Path and filename	• \3_synthesize_define\user_scenario\examples\userscenario_springstreet_sf.ai

Example 2: Xerox—User scenarios (San Francisco)

Unique purpose	• Identify areas where users may potentially leave Xerox.com and unknowingly enter a non-Xerox.com site
Software	• Adobe Illustrator
Path and filename	• \3_synthesize_define\user_scenario\examples\scenarios_xerox_sf.pdf

Secondary research findings   Activity G: Synthesize information

🔴 **IA partly owns**

Secondary research findings consolidate the results of research other than the primary research normally performed as part of the focused research efforts. Such research may include existing client research, 3rd party industry research, or analysis of other secondary sources such as news publications. Clients frequently have existing research done internally or by outside groups that is provided to the project team. Analysis of secondary research can be used to explore specific areas of information or specific user types. It is important to understand the context and format of the research that is provided to determine its value to solving the current problem. Secondary research findings are incorporated into the definition document.

Purpose	• Provide a top line summary of the most important findings resulting from secondary research • Explore additional research topics • Evaluate research that has already been done by the client and to understand any assumptions they may have made based on this research
Audience	• Internal team • Client
Major components	• Evaluation criteria for existing research • A distillation of research into high-level findings and supporting examples • Follow-up questions for the client • Opportunities for actions that the project team could take
Supporting activities	• Reading corporate materials • Analysis of existing research • Discussions with previous review teams

Recommended steps	• Read materials & participate in interviews • Identify and prioritize the key issues of importance emerging from the research • Identify follow-up questions & opportunities for discussion
Software	• MS Excel • MS Word
Contributors	• Brand Strategy
Examples	• Xerox—Secondary research findings

Example 1: Xerox Secondary research findings (San Francisco)

Audience	• Internal
Unique steps	• Read materials & participate in interviews • Identify and prioritize the key issues of importance emerging from the research • Use supporting instances or examples from the research to support the findings • Identify follow-up questions & opportunities for discussion
Software	• MS Excel
Path and filename	• \3_synthesize_define\sec_research\examples\scenarios_xerox_sf.pdf

Executive interview findings   Activity G: Synthesize information
🔴 IA partly owns

Executive interview findings synthesize the information gathered from interviews with client executives. The level of detail of the findings varies based on what is appropriate for the specific client and project. The findings are typically integrated into team deliverables and presentations.

Purpose	• Identify the key findings from the IA perspective • Communicate the findings to both the team and client
Audience	• Client • Internal team
Major components	• Explanation of where the information came from • Unique high-level findings • Explanation of the unique findings • Examples (either written or visually illustrated) to help communicate the findings

Package evaluation document

○ IA inputs / consents

The package evaluation document, often part of the business design document created by the Technology team, outlines the software packages under consideration for the implementation of the project.

Overview

Purpose	• Document the research and findings of package evaluation
Audience	• Client

Feature list

● IA owns

The feature list describes the anticipated features (content and functionality) for the proposed site. The feature list evolves during the Define and Concept phases and is integrated into the scope matrix during the Design phase.

Overview

Purpose	• Clearly define each feature (content or functionality) • Reach a common understanding of what the project will include (i.e., the project scope) • Clearly identify all assumptions
Audience	• Client • Internal team
Major components	• Name of each feature • Description of each feature • Requirements for each feature • Assumptions • Prioritization of features • Estimated level of complexity (e.g., simple, medium, complex)
Recommended steps	• Gather feature wish list (and requirements if any) from the client and the internal team • Set up a template for the scope matrix with major components • Using the template, list ALL gathered features with necessary information • If the matrix needs to be prioritized, then prioritize using set criteria, evaluating each feature
Software	• MS Excel • MS Word • Adobe Illustrator • QuarkXPress
Contributors	• Technology • Project Management
Doneness criteria	• All features prioritized—the team knows which features (and their requirements) are in or out of

		the scope of a project
	•	The team and client agree on the details of each feature (and its requirements)
	•	Freeze date for the final scope matrix set.
	•	Everything we built should be reflected accurately on the matrix at the end of project
Examples	•	Hallmark—Scope document
	•	First Union—Feature recommendation

Example 1: Hallmark—Scope document (San Francisco)

Unique purpose	•	Identify individual scope elements for specific functionality of the site
	•	Document each element's status and priority
	•	Identify the estimated number of templates, the template types, and the estimated time required to complete each section of the site
Software	•	MS Excel
Path and filename	•	Not currently available

Example 2: First Union—Feature recommendation (Atlanta)

Unique purpose	•	Organize features initiated by the client and features discovered in user research by user activity
	•	Suggest a phased approach for the implementation of features that will support both user needs and client objectives
Audience	•	Client core team
Time frame	•	One week
Unique steps	•	Entire team met to review organized list of features and functionality and to rank each by its technical complexity and the degree to which it met user goals
	•	Team then created phased approach and documented recommendations
Software	•	Visio
Unique contributors	•	Content Strategy
	•	System Architecture
	•	Experience Modeling
Path and filename	•	\3_synthesize_define\feature_list\examples\featur esolution_fub_atl.pdf

⬤ IA inputs / consents

The definition document defines the client's problem, current state, and the key project objectives. This document also serves as an accurate gauge for the ultimate success of the project. At the end of the project, the team should be able to return to this document and say that they have met all the requirements identified. The definition document typically contains each of the previous deliverables described above along with the work done by other disciplines during the Discover and Define phases.

Overview

Purpose	• Communicate IA findings and implications from work done in the Define phase • Work with the team to create a common understanding of what the problem is and what opportunities will be addressed in coming phases of a project • Work with the team to document why decisions, compromises, and recommendations are being made
Major components	• Introduction • Sections with findings from each practice/discipline or one section that combines high-level findings from multiple practices/disciplines • Summary • List of assumptions • Questions to be answered in the upcoming activities • List of next steps • List of dependencies • Appendix with detailed findings

	Discover		Define		Concept		Design		Implement
1	2	3	4	5		6	7		

A — B — C — D — E — F — G — H — I — J — L — M — N — O — P — Q — R — S — T — U

Entry criteria
- finding/models generated from research
- user audiences + needs identified
- current state analysis completed
- business problem defined
- client technical capabilities assessed
- areas of opportunity identified
- recommendations made for solutions
- brand strategy assessed
- content strategy assessed
- reconciliation made with objectives and vision
- (high-level) features identified
- package selection criteria established
- technical benchmark established
- **client consensus and sign-off**

K Refine concepts

I Develop concepts

J Evaluate concepts

L Choose concept

final concept

Exit criteria
- single concept selected
- scope, vision, and requirements validated
- feature list generated
- package selection confirmed
- list of open issues and risks generated
- **client consensus and sign-off**

Step 4: Explore Possibilities

Step 4 overview

After the business problem and initial opportunities have been identified, the IA team must begin to explore possible solutions with other team members that continue to reconcile the relationships between business needs, user needs, and technology capabilities. Solutions initially take the form of concepts: sets of ideas that are high-level, thematic treatments of the solution combined with discrete pieces of proposed functionality. The final concept becomes the base strategy that all disciplines and practices use as a guide in designing and building the solution.

Key goals:
- Generate lots of ideas
- Synthesize findings from Define into a physical manifestation
- Create concept(s)
- Solve problems
- Define features
- Choose a single concept

Key activities:
- I. Develop concepts
- J. Evaluate concepts
- K. Refine concepts
- L. Choose a concept
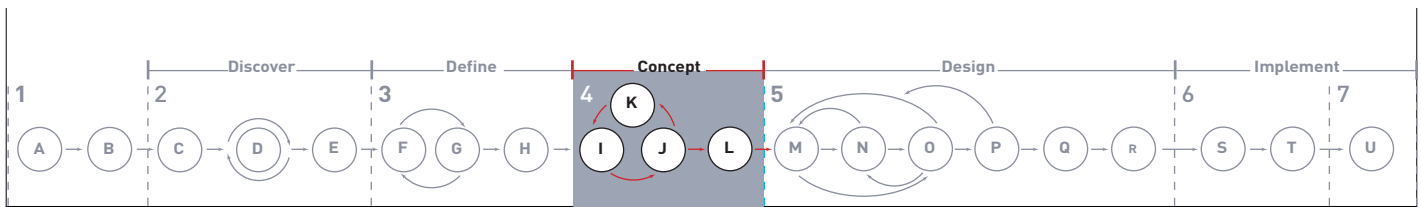
Key interactions with other team members:
- Work with XMOD to develop test plan and test concepts with users
- Work with Technology to inform concepts with understanding of packages and current technical infrastructure
- Work with Brand Strategy to ensure concepts are "on brand"
- Work with the other creative practices, XMOD, and technology to collaborate on concept
- Work with Site Development, if necessary, to produce prototypes, identify constraints, and explore possible implementation strategies

Deliverables by activity:
- I. Develop concepts
  - Concept model ●
  - User task models (see step 3) ●
  - Concept scenarios ●
  - Concept prototype ◐
- J. Evaluate concepts
  - Concept prototype ◐
  - User testing findings ◐
- K. Refine concepts
  - Revised concept models ◐
- L. Choose a concept
  - Concept document ◐
  - Feature list (see step 3) ●

Length of step:
- Two to six weeks

Step 4 activities

NOTE: Creating concepts is an iterative and complex process that includes the activities of developing, evaluating, and revising. The linear presentation of the activities that follow below should not be taken literally.

I. Develop concepts
The areas of opportunity identified in the previous step should imply a range of solutions. Through the further reconciliation of user needs, business opportunities, and technology capabilities, the team begins to develop solution ideas, also known as concepts. As a starting point, the team reviews the findings and models from the previous step and determines the appropriate steps to begin idea generation.

A concept is the "big idea" that conveys the nature of the solution that we'll be designing. Concepts can take many forms, often beginning with simple sketches of organizations and page layouts. These concept sketches gradually gain definition as they are iterated through rounds of testing and refinement. Once complete, a concept should have an implied organizational structure, a specific set of content and functionality, and a concept description, which briefly states the overall nature of the concept.
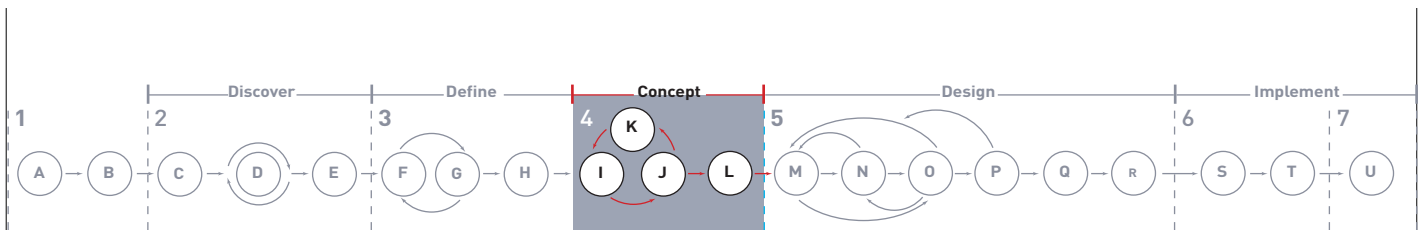
The team should attempt to come up with distinctly different concepts, which improves the ability to gain insight through comparison and contrast in evaluation. Some projects, however, have very straightforward solutions, so the team will not need to focus on exploring the various possible conceptual solutions. In this case, the team will concentrate on specific details of functionality.

The team should also work closely with XMOD to develop a plan for identifying users and testing early concepts.

Techniques:
- Brainstorming
- Sketching (paper and whiteboard)
- Paper prototyping
- Interactive prototyping
- Affinity diagramming

Team members involved:
- IA team
- Creative team
- Technology team
- XMOD team

Length of activity:
- One to four weeks depending on the complexity of the problem

J. Evaluate concepts

Once a set of initial concepts is developed, each concept must be evaluated for its appropriateness, usefulness, and usability. This can be done in many ways, the most common of which is user testing. Key areas to target in evaluation include: Does the functionality solve the business problem? Does the functionality and organization satisfy the users' needs? Is it easy to use? Does the concept reinforce the desired brand personality?

The key evaluation criteria for concept testing should be defined in advance, and should be derived from the results of our focused research on users and their needs, the client's vision, and the brand positioning.

Techniques:
- Internal team evaluation
- Formal user testing
- Informal user testing
- Participatory design research and development (Sapient staff and external users)
- Client review
- Heuristic evaluation
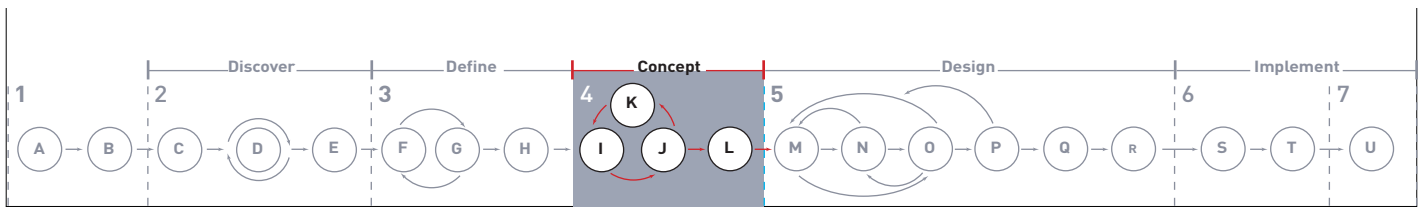
Team members involved:
- IA team
- Creative team
- XMOD team
- Technology team
- Client team

Length of activity:
- One to five days for each test depending on the complexity of the project

K. Refine concepts

Feedback from the evaluation should guide further refinement of the concepts, possibly adding layers of detail as they are developed. It is critical that the idea is developed far enough to determine that the solution is viable. An effective approach for doing this is to "drill down" to explore key areas of functionality using concept scenarios. It is important, however, to ensure that this activity does not turn into simple usability testing of detailed screens.

The iterative cycle of concept development, evaluation, and refinement should be used to develop a general organization, context, and theme for the solution as well as to identify key pieces of desired functionality, but not to actually develop the details of the architecture. Remember that a concept is the "big idea" for the solution and not the architecture itself.

Techniques:
- Prototyping
- Sketching
- Additional brainstorming

Team members involved:
- IA team
- XMOD team

Length of activity:
- One hour to one week depending on feedback from evaluation

L. Choose a concept

Once the concept(s) have been developed, one or more need to be documented and presented to the client for selection and sign-off. The concept will form the basis for the architecture of the solution. The documentation of the concept should be straightforward and easy to understand, and most importantly, should demonstrate (using real data) that the concept meets the needs of the users, the requirements of the business, the requirements of the brand, the capabilities of the technologies under consideration, and addresses key issues raised by the client.

The client must sign off on the concept document.
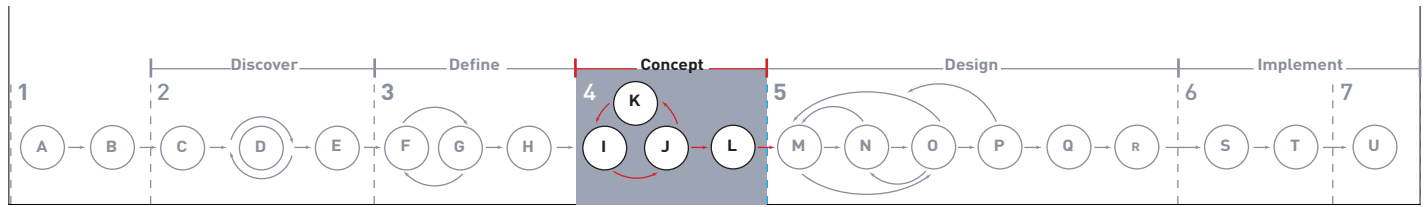
Techniques:

- Very thorough documentation
- Diagramming
- Visual modeling

Team members involved:

- IA team
- Creative team

Length of activity:

- One week plus time for editing and production (usually one to two weeks)

Step 4 deliverables

Note: All deliverable examples discussed in this section can be found on the Sapient network at \\webteam\information_architecture\deliverables

Concept model   Activity I: Develop concepts

🔴 IA owns

A concept model is a diagrammatic representation of a Web site's main categories and features that seek to reconcile the business needs with user needs and technical capabilities. A concept model expresses how the recommended concept—the big idea—affects the organization of and relationships between content, the relative priority of organizational groupings, and the potential hierarchy of those groupings. A concept model can take the form of an organizational model (e.g., bubble diagram) that only communicates organization, relationships, and relative priority of content and functionality groupings. Concept models can also have an added level of detail that indicates hierarchy and some initial navigational paths. This type of model is the first step toward a page-level site map and often resembles one. Concept models do not indicate individual pages within a site (see site map), page layout (see screen details), or detailed interactions (see process flows).

Overview

Alternative names	• Functional domains (Atlanta) • Bubble diagram • Concept diagram • Organizational model • High-level site map
Purpose	• Visually communicate the high-level organization of a new Web site • Illustrate the reconciliation of the business goals with the user needs and technical capabilities • Provide an opportunity for the client to respond to our initial thinking about a site's organization before moving into more detail • Provide a visualization of the organization of features and content
Audience	• Client • Internal team
Major components	• Diagram showing main content and functionality • Brief descriptions of significant content and functionality
Supporting activities	• User scenarios • Affinity diagramming
Recommended steps	• Select visualization tool of choice • Visualize major groupings of content and functionality in a way that identifies relative scale (importance) and relationships between the groupings • Describe each of the groupings with a descriptive label that indicates why each grouping is unique and what are each grouping's characteristics and features • Show major relationships between groups

Software	• Adobe Illustrator • Visio
Contributors	• Brand Strategy • Graphic Design • XMOD • Content Strategy • Digital Business Strategy • Technology
Doneness criteria	• Concept model satisfactorily meets business goals, user needs, and technical capabilities • Diagram succinctly communicates the idea

Example 1: SpringStreet—Concept model (San Francisco)

Unique purpose	• Show the results of an affinity diagramming activity • Show the rating of how well each feature satisfied user needs and drove users to make business transactions • Identify the complexity in building each of the features displayed
Audience	• Internal team • Client
Time frame	• This was the result of a three-day team workshop that included rating and scoring potential features, an affinity diagramming exercise, and generating a feature list using this model • The model took half a day to draw and rework
Unique steps	• Start with list of potential features from brainstorming sessions with team and client • Understand how users want to use features (by using the results of prior user testing). Make these the criteria that your features will be scored against. • Identify the business requirements of the site • Make these additional criteria that your features will be scored against • Include a complexity scale for the technology required (high, medium, low complexity) • Make these additional criteria that your features will be scored against • Have the team participate in checking which business and user requirements are satisfied by each feature • Count up the criteria to get a score for each feature • Color code the features according to which scored high, medium, or low • Write the feature on a color-coded "stickie" and do an affinity diagramming exercise • Look at the affinity groups and then determine the

	relationships between the groups. This is your conceptual model. • Iterate and refine • Present to client
Software	• MS Excel for the evaluation matrix and results score card • Adobe Illustrator for the conceptual model
Path and filename	• \4_explore_possibilities\concept_model\examples\ conceptmodel_springstreet_sf.ai

Example 2: Sallie-Mae—Concept model (Atlanta)

Unique purpose	• Modeled the possible ways that the feature set and user experience would scale over time
Audience	• Internal team • Client core team
Time frame	• Estimated three to five days • Eight days to brainstorm concepts and build models
Unique steps	• Reviewed suggested features and content • Brainstormed ways to communicate or position the site based on features, audience, and brand • Chose best possibilities and explored organizational models • Refined ideas and expanded into high-level site structures • Created scenarios for key audiences (identified primary activities for each audience) • For each scenario, communicated different navigation paths through concept model
Software	• Visio
Unique contributors	• Content Strategy
Path and filename	• \4_explore_possibilities\concept_model\examples\ highlevelarch_salliemae_atl.pdf

Example 3: United Airlines—Concept model (New York)

Audience	• Client
Time frame	• Four weeks
Software	• Adobe Illustrator and presented in a QuarkXPress document
Path and filename	• \4_explore_possibilities\concept_model\examples\ conceptdrafts_ual_ny.pdf

⬤ IA partly owns

Concept scenarios support concept models and communicate how the concept will be carried down to the page level. Concept scenarios are based on the concept model and user scenarios. Concept scenarios are important to create for several reasons; the concept model alone is often too abstract for the client to understand. These scenarios communicate how the concept will influence the user experience, and they provide a bridge between the Concept phase and the upcoming Design phase. Concept scenarios allow the client and internal team to visualize the concept in much more concrete detail and within the context of actual Web site.

Overview

Purpose	• Reinforces and explains the concept at a screen level • Illustrates how significant features might be implemented • Conveys more detail around the user experience
Audience	• Internal team • Client
Major components	• Diagram of Web page (this diagram is not as detailed as the screen detail described in step 5) • Placement of the features, content areas, and groups of related links on the page • Call-outs describing each feature, content area, and link grouping • Smaller diagrams of Web pages showing how the site changes from one level to another based on the concept • Key for cross-referencing any special characters or colors in the diagrams
Supporting activities	• User scenarios have been written and features have been identified

Recommended steps	• The concept scenario should be based either in whole or in part on one of the user scenarios already generated. It may be based on a new user scenario if features have been added that are not used in any of the current or existing user scenarios.
	• With the feature list in mind, begin to brainstorm how features can be used to support each concept
	• Sketch out or "whiteboard" the screens that will extend the concept into lower levels of the site. This exercise can be looked at like storytelling. It can be fictional in nature and will contain a sequence of related steps that lead to a desirable conclusion.
	• Once a series of steps that illustrate the concept have been created, put that concept sketch aside and start on a new series of sketches.
	• After several concept sketches have been created, select the best one
	• In Adobe Illustrator or Visio, mockup the selected concept sketch
	• Use color to note content types, features, and groups of links on the screen
	• Use call-outs to describe unique characteristics between one concept scenario and another one
	• Include this concept scenario with the related concept model in the concept document
	• Review with entire team to make sure the scenarios are understandable and communicate the concept
Software	• Adobe Illustrator
	• Visio
Contributors	• Content Strategy
	• Graphic Design
Doneness criteria	• The internal project team agrees that the concept scenarios accurately communicate the concept

Example 1: Hallmark—Concept scenarios (San Francisco)

Audience	• Client team
Time frame	• These concept scenarios were part of a concept document that was created as part of a 6-week Concept phase
	• Two weeks were dedicated to the design and production of the entire concept document
Software	• Adobe Illustrator
Path and filename	• \4_explore_possibilities\concept_scenario\exampl es\ conceptscenario_hallmark_sf.pdf

Concept prototypes

🔴 IA partly owns

Concept prototypes are generated from concept models and user scenarios. Concept prototypes are used to iterate and refine concepts and to gather feedback from users. These prototypes differ from other types of prototypes such as high-, medium- and low-fidelity interaction prototypes, in that they do not include all page-level interactions or screen details. Mockups of screens will include global and local navigational elements and elements that are unique to each concept. Concept prototypes will be our starting point for creating prototypes in the Design phase.

Overview

Purpose	• Iterate and refine concepts with users • Test initial assumptions about concept directions
Audience	• Internal team • User test participants
Major components	• Concept model • Content—taxonomy and nomenclature • Mock-up screens
Supporting activities	• User profiles have been established and concepts generated
Recommended steps	• Using the concept model as a starting point, mock up screens that best communicate the concept • Work with the user researcher to identify testing objectives, audience types, and write the test plan • Accompany user researcher for testing • Assist the user researcher in analyzing findings • Iterate and revise prototype based on findings
Software and other tools	• Paper/pens • HTML—Dreamweaver, Fusion, Homesite, FrontPage • MS PowerPoint • PDF • Adobe Illustrator • Visio • Macromedia Director • Adobe Photoshop • Flash
Contributors	• Site Development • User Research • Graphic Design • Content Strategy
Doneness criteria	• The prototype addresses the key aspects of the concepts • Users have approved of the prototype

Example 1: United redesign of student site—Concept prototype (New York)

Unique purpose	• Help the team understand users' expectations and needs when traveling • Have the user influence and shape the final concept
Audience	• Internal team
Time frame	• One week
Format	• Paper • Video
Unique contributors	• Full team
Path and filename	• \4_explore_possibilities\concept_model\examples\ conceptproto_ual_ny.pdf

Example 2: HP Services—Concept prototype (San Francisco)

Audience	• Internal team
Time frame	• One day to create concept prototype • One day to conduct testing • One day to analyze
Unique steps	• With an understanding of the concept model, the user researcher wrote several different scenarios • Created concept map and two mock-up screens in Adobe Illustrator • Conducted interviews with one representative from each audience type using the concept model and mock-up screens • Revised concept model based on user feedback
Software	• Adobe Illustrator • MS Word
Path and filename	• Not currently available

Concept document   Activity L: Choose concept
🔴 IA partly owns

The concept document is the final deliverable for the Concept phase. Creating the concept document is a truly collaborative team endeavor. Each team member is responsible for representing his or her respective practice/discipline's contribution to the final concept(s). This document is the container for all the documents that have been produced since the definition document, such as additional user research findings, a refinement of the business objectives, consolidated user needs, the concept model, and concept scenarios. The concept document provides the client with one comprehensive snapshot of the concept(s) and communicates how the team generated these concepts. Once the client has selected one concept and signed off on it, the team enters the Design phase.

The concept document should: (a) provide the client with enough information to make an informed decision on the overall direction of their Web site or application and (b) provide the team with enough detail to move immediately into the Design phase.

Overview

Alternative names	• The "big idea"
Purpose	• Communicate the proposed core concept(s) that will drive the site • Provide the rationale for how the team arrived at the concept • Provide one complete explanation of the concept(s) being considered • Serve as a reference to help the team and client make decisions in the Design phase
Audience	• Client
Major components	• Introduction—this may include a description of the problem and/or concept scenarios (examples of how a user would interact with the proposed concept) • List of business goals and user needs • Final feature list or scope matrix • Refined and/or consolidated user profiles and task models • Concept model(s) • Concept scenarios • Verbal description of concept(s)
Supporting activities	• All Concept deliverables have been refined
Recommended steps	• Gather all relevant materials created in the Concept phase • Articulate the purpose for this document • Define the structure of the document • Describe how the concepts address the requirements and solve the problem, and describe the team's problem solving process • Integrate all the materials into the document • Describe significant differences between the concepts, associating user behaviors with the concepts. If multiple concepts are presented, describe the pros and cons for each. • Review with internal team • Revise and publish • Present to client • Get client sign-off
Software	• Visio • Adobe Illustrator • QuarkXPress • MS Word
Contributors	• Brand Strategy • Graphic Design • XMOD • Content Strategy • Digital Business Strategy

	• Technology
	• Production
	• Project Management
Doneness criteria	• Succinctly communicates the concept and provides all necessary background information

Example 1: Hallmark—Concept document (San Francisco)

Unique purpose	• This is the Cadillac of concept documents—high production value and created in collaboration with a full multidisciplinary team. The unique purpose of this example is to show three different concepts based on one set of features. These concepts were extended down to the page level (by including concept scenarios) as a way to indicate HOW each concept would affect the user experience.
Audience	• Client team • Key Hallmark stakeholders • Internal project team
Time frame	• Six-week Concept phase • Two weeks for design and production
Unique steps	• The outline for this document was created once the team reached agreement on the common organization model and unique theme for each concept. Based on this outline, the document was divided into sections, and owners were assigned to each section. Each of the practices took ownership of their respective section of the document while the creative directions were developed collaboratively among three separate groups on the team. Graphic Design and IA collaborated to develop the schematic visual language used for screen representations. Each day the document would be assembled and reviewed as a group. Based on group feedback—user scenarios, example screens, and additional support materials were added to the document to help communicate the overall user experience to the clients.
Software	• Adobe Illustrator • QuarkXPress • MS Word
Path and filename	• \4_explore_possibilities\concept_document\examples\ conceptdoc_hallmark_sf.pdf

Example 2: HP e-Services—Concept document (San Francisco)

Unique purpose	• This is the VW Bug of concept documents—small but efficient. The unique purpose was to describe a concept for a very complex topic in several concise steps.
Audience	• HP mid-level executives
Time frame	• Two weeks for Concept phase
Unique steps	• Identify user Intents, Audience Types, Questions, and Needs (see Roles: Groups, Questions, and Needs doc) • From these, identify Features (see Roles: Features doc) • Sapient's team worked internally to organize features • One round of user testing to validate concept (see Concept Map • From a higher level perspective, diagram user patterns through the proposed site (see High-Level Concept doc) • From Concept Map, move down one level to describe details of each feature
Software	• Adobe Illustrator
Path and filename	• \4_explore_possibilities\concept_document\examples\hp_ecs\alliances_hpecs_sf.pdf • \4_explore_possibilities\concept_document\examples\hp_ecs\conceptmap_hpecs_sf.pdf • \4_explore_possibilities\concept_document\examples\hp_ecs\hilevelconcept_hpecs_sf.pdf • \4_explore_possibilities\concept_document\examples\hp_ecs\solutions_hpecs_sf.pdf • \4_explore_possibilities\concept_document\examples\hp_ecs\technology_hpecs_sf.pdf • \4_explore_possibilities\concept_document\examples\hp_ecs\understand_hpecs_sf.pdf

Entry criteria
- single concept selected
- scope, vision, and requirements validated
- feature list generated
- package selection confirmed
- list of open issues and risks generated
- **client consensus and sign-off**

M — Create site structure
N — Model processes/activities
O — Define detail
P — Evaluate, validate architecture
Q — Complete architecture docs.
R — GUI design review

site map · process flows · screen details · IA docs. to project team · GUI + HTML

Exit criteria
- functional specifications are final
- findings from prototype testing have been incorporated
- IA documentation validated by and delivered to the project team and client
- open issues resolved
- locked scope
- process for QA defined
- schedule for build releases created
- **client consensus and sign-off**

Step 5: Architect and iterate the solution

Step 5 overview

After a concept has been chosen by the client, the IA team must "actualize" the solution, by designing and specifying the information architecture that will support the development of the system architecture, user interface, and content. As the architecture is developed, it must be evaluated for usefulness, then validated for usability with users.

Key goals:
- Design innovative and appropriate solutions
- Create a site structure and organization
- Design the user and system interaction
- Create the screen details
- Document and integrate the architecture with other disciplines/practices

Key activities:
- M. Create site structure
- N. Model process and activities
- O. Define detail
- P. Evaluate and validate the architecture
- Q. Complete architecture documentation
- R. Review GUI design

Key interactions with other team members:
- Collaborate with Graphic Design on screen-level functionality, layout, and navigation
- Validate interaction with Brand Strategy
- Work with Technology to refine process flows and integrate knowledge of implementation packages and functionality
- Work with Content Strategy to refine nomenclature in site structure, navigation, screen-level content types, and instructional copy. Also collaborate on the integration of content management and personalization functionality.
- Work with Site Development to evaluate the feasibility and appropriateness of front-end functionality
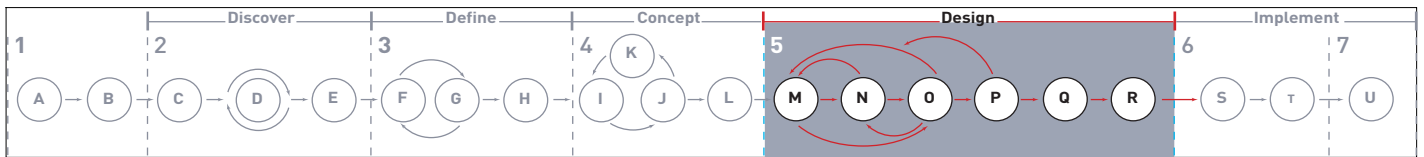
Deliverables by activity:
- M. Create site structure
  - Site map ●
  - Content matrix ○
- N. Model processes and activities
  - Process flows ●
- O. Define detail
  - Interaction prototypes ●
  - Low-fidelity prototypes ●
  - Medium-fidelity prototypes ●
  - Screen details ●
  - Screen list ●
  - Screen template system ●
  - Data specifications ◑
- P. Evaluate and validate the architecture
  - User testing findings ◑
- Q. Complete architecture documentation
  - Functional specification ●
  - Site map ●
  - Content matrix ○
  - Screen details ●
  - Screen list ●
  - Screen template system ●
  - Data specifications ◑
- R. Review GUI design
  - High-fidelity prototypes ◑

Length of step:
- Six to twelve weeks depending on project size and complexity
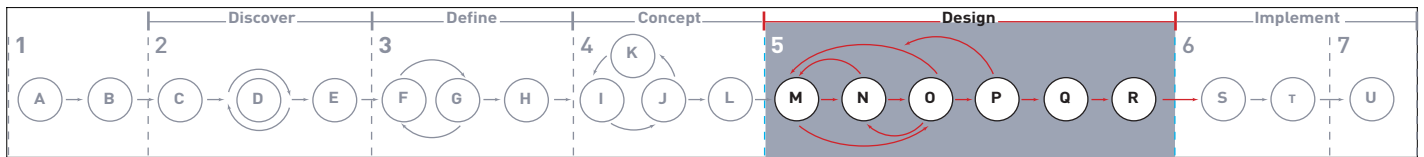
Step 5 activities

M. Create the site structure

Once a concept has been selected, the solution must be architected, starting with the organization and hierarchy of screens and content. The concept model should have included high-level groupings and organization of content, and in this activity, those areas as well as the relationships between them should be fleshed out and taken to the next level of detail. Content should be grouped, organized, and labeled, working closely with Content Strategy, especially around nomenclature. The navigational scheme should be developed and documented.

It should be made clear that the site structure is by no means final at the end of this activity—it will undergo significant revisions and additions over the course of the remainder of the project. The first pass of the site structure can be further refined only by defining additional details in process flows and screen details.

The client must sign off on the first pass of the site structure, with the understanding that it will grow and change as we move through further definition of the architecture.

Techniques:
- Affinity mapping
- Card sorting
- Logical grouping
- Brainstorming

Team members involved:
- IA
- Content Strategy

Length of activity:
- One to five days with ongoing iteration
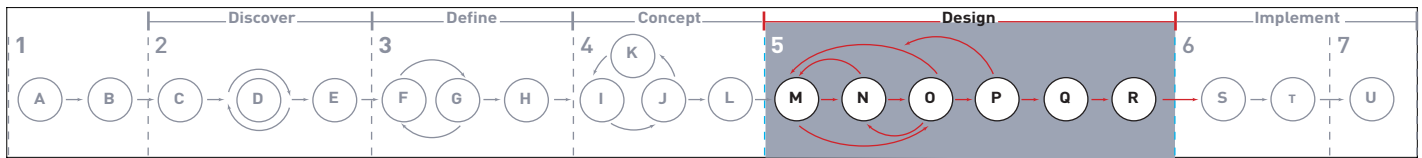
N. Model processes and activities

Once the site structure has been created at a high level, the interaction flow of the various functional modules of the solution should be designed. Building on the interactions developed though concepting, the IA team should create process flows for each functional element of the solution, starting at a high level and iterating through the lowest level of detail.

First, start with the major high-level user tasks involved in the process, which can be determined from the user task model. Then in successive revisions, take each task and break it down into further levels of detail until all user interactions, backend processes, data interfaces, and error states for the system have been defined.

Process flows should be informed by and checked with the technical team to make sure that the functionality being designed is possible given the technology solution. At every level of refinement, process flows should be reconciled with the site map. New screens will undoubtedly surface during process modeling, and these must be added to the site map.

Clients must generally sign off on process flows. In some cases, there may not be a client stakeholder who is capable of fully understanding and signing off on the process flows. In this case, the process flows become an internal deliverable.

Techniques:
- Unified Modeling Language (UML)
- Essential modeling
- Contextual design modeling
- Iterative process flowcharting
- Use-case generation

Team members involved:
- IA
- Technology

Length of activity:
- One to three weeks depending on project scope and complexity. Ongoing iteration.
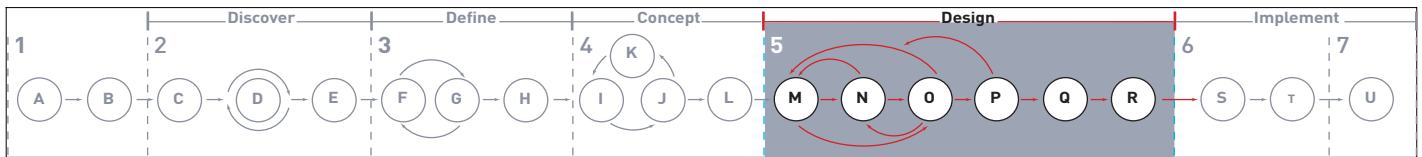
O. Define detail

Once the process flows and site map have been iterated to an appropriate level of detail, the individual unique screen types and their content must be developed and detailed. The site architecture and process flows should serve as an initial inventory of the screens that will need to be created.

For each section or functional module of the solution, design the first screen the user sees and move through each subsequent screen in the process flow until each screen has been designed. Focus on specifying the navigation hierarchy, the content hierarchy and flow of screens, and the interaction of all functional elements that will need to appear. Placeholders can be used for global navigation, so that changes in navigation don't require changes on every document. Local or contextual navigation should be specified at the screen level. Don't forget to design error screens and other uncommon screens like 404 not found, Help, etc. The IA team should also make a first pass at writing and placing the appropriate instructional copy that will inform the screen-level interactions.

The process of creating screen details is a process that benefits from an iterative approach, where levels of detail are added through subsequent revisions.

In addition to the iteration through the screens to gain more definition, there will inevitably be changes or additions to the interaction that must be rolled back up into the process flows and site architecture documents. This process is extremely important and must be done with an eye to making sure the interaction is consistently represented in all these documents. The development of the screen details should be done in close collaboration with Graphic Design and Content Strategy, with input from Technology and Site Development.
Graphic Design interprets the screen details as a starting point for developing the final visual systems and screen design. Screen details should not represent the final design or layout of a screen.

The client must sign off on screen details.
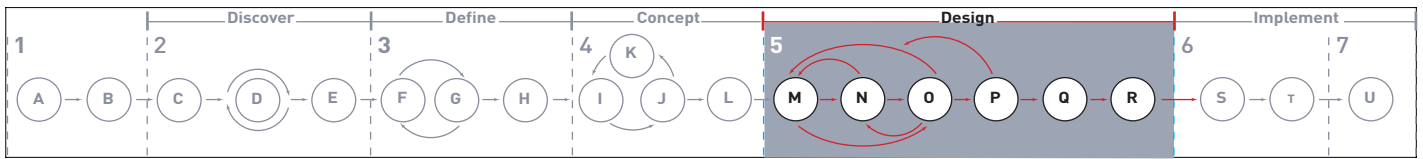
Techniques:
- Sketching (paper or whiteboard)
- Layout in drawing or graphics application
- Interaction prototyping

Team members involved:
- IA
- Graphic Design
- Technology
- Site Development
- Content Strategy

Length of activity:
- Two to six weeks depending on size of solution

P. Evaluate and validate the architecture

The screen details, once developed, must be tested for usability. With the assistance of XMOD, the team must test, at minimum, all the non-standard areas of functionality. This usability testing should be qualitative, however, since the true graphical interface has not yet been built at this point. Make sure the project schedule includes adequate time to perform iterative rounds of testing and revision on the architecture.

In addition to the evaluation of the architecture with users, the screen-level architecture needs to be synced up with the rest of the project team to ensure that it reflects the goals and the input of all practices and disciplines on the project. Is the interaction technically feasible? Does the interaction reflect the brand personality? Does the interaction sync with the content architecture? Can it be built in HTML? Does it truly solve the client's business problem? Does it adhere to the browser technology standards outlined in the definition document?

Techniques:
- Internal evaluation by XMOD
- Formal usability testing
- Heuristic evaluation
- Discount usability testing
- Meetings/collaboration with other practices/disciplines

Team members involved:
- Entire team

Length of activity:
- Less than one week
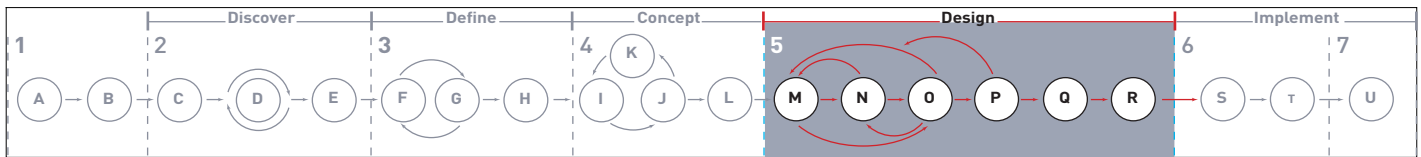
Q. Complete the architecture documentation

Once the details of the solution have incorporated the results from usability testing, the full architecture must be documented.

This does not mean simply taking all the different architecture deliverables and putting them into the functional specification. Additional layers of information must be included to make these documents usable by other disciplines. These layers include data validation and specification, error states and exceptions, content types mapping, and template types specifications. In addition to these additional pieces of information that will be a part of the screen details, the IA team must also provide a comprehensive inventory of all screens for Technology, Graphic Design, Content Strategy, and Site Development to use.

The screen details must also be integrated into a template system that catalogs the different types of elements that will appear at the screen-level interaction and describes their behaviors, relationships, and characteristics. The idea is to move toward an object-oriented system that deals with screen elements not as individual instances but as components in an overall system. This template system communicates design objects clearly to other practices, especially Content Strategy and Graphic Design, and assists in the scoping and implementation from a Technology perspective.

Once developed, the site architecture documentation must be delivered to Technology, Graphic Design, Content Strategy, and the client.

The client must sign off on the full architecture. This documentation should be thorough and detailed enough to provide the authoritative description of the user-facing scope of the project.

Techniques:
- Manually reconcile every page on the site map(s), process flows, screen details, and screen list
- Systematically document additional details
- Data modeling/entity relationship diagramming

Team members involved:
- IA
- Creative
- Technology

Length of activity:
- Two to six weeks
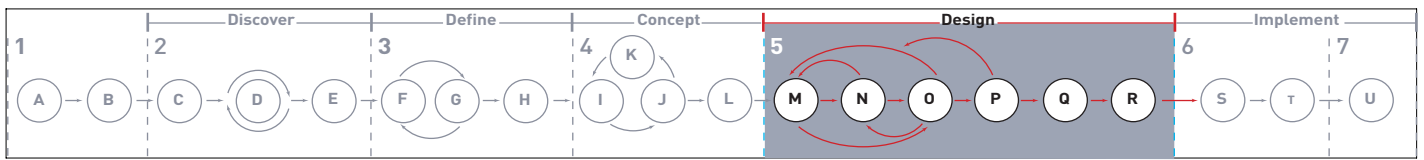
R. Review GUI design

Once the designers have developed the key screen comps for the interface, the comps must be reviewed to ensure correlation with the architecture, and ideally they should be usability tested.

At each further refinement and extension of the visual direction, the IA team and Graphic Design team must review and test the screen designs. In almost all cases there will be refinements made to many pieces of the site architecture based on client feedback, user testing, and design innovations. Screens may be deleted, added, changed, etc. It is absolutely critical that these changes are then reflected by corresponding changes to the architecture documentation.

Techniques:
- Review meetings
- Formal usability testing
- Hand-off for review
- Prototyping (medium- and high-fidelity)

Team members involved:
- IA
- Content Strategy
- Site Development
- Graphic Design

Length of activity:
- Ongoing as visual designs are developed, refined, and extended

Step 5 deliverables

Note: All deliverable examples discussed in this section can be found on the Sapient network at \\webteam\information_architecture\deliverables

Site map   Activity M: Create site structure

🔴 IA owns

A site map is a visual depiction of the organizational structure, hierarchy, and relationship of the screens in a site. Site maps also specify each screen's type and name, and the numbering system that is referenced throughout most IA deliverables. The site map is often what the client and team use to form their basic impression of how the site will be organized. The IA team works closely with Content Strategy to make sure the site organization and content strategy are in sync. The site map is preceded by audits, a scope matrix, and a final concept. A site map is needed to understand the next level of detail after developing the final concept model. The site map contributes to the creation of process flows and screen details.

Overview

Alternative names	• Site architecture map, overview architecture
Purpose	• Identify each screen, its hierarchy, type, number, and key relationships to other screens in the site • Understand the size of the site
Audience	• Client • Internal team
Major components	• Diagrams showing each page or page type, in the site • Key with all relevant symbols • Call-outs showing detailed page flows • Version number • Author • Date
Supporting activities	• Interaction prototypes (low fidelity) • Task analysis • Definition of content types
Recommended steps	• Team generates hierarchies for content and features based on the concept model • Post-It notes (stickies) and/or the whiteboard are used to sketch out the location of individual pages • These relationships may be based on detailed scenarios or task analysis • Sketches are refined by user testing or informal team review • The IA starts mapping the location of each page using Visio, MS PowerPoint or Adobe Illustrator
Software	• Visio • Adobe Illustrator • QuarkXPress • MS PowerPoint • Inspiration • Claris Impact

Contributors	• Content Strategy
	• Graphic Design
	• User Research
	• Technology
	• Digital Business Strategy
Doneness criteria	• Pages needed for all interactions on the site are accounted for
Examples	• First Union Redesign—Site map
	• AutoNation—Site map

Example 1: First Union Redesign—Site map (New York)

Unique purpose	• Identified unique pages in the site
	• Identified which templates and components to use on each page and reference samples
	• Used in conjunction with the template list and style guide to build out the site
Audience	• Client – Deliverable for approval or sign-off Internal team
Time frame	• Five days
Software	• Visio
Unique contributors	• Content Strategy
	• Graphic Design
	• Site Development
Path and filename	• \5_architect_iterate\site_map\examples\sitemap_f ub_ny.pdf

Example 2: AutoNation—Site map (San Francisco)

Unique purpose	• Cataloged every discrete page in the site
Audience	• Internal
Software	• Inspiration
Path and filename	• \5_architect_iterate\site_map\examples\sitemap_ autonation_adj.pdf

Content matrix   Activity M: Create site structure

⭕ IA inputs / consents

The content matrix is a tool used by the Content Strategy practice to identify, organize, and filter the different types of content that will be included in the site. The IA works with the Content Strategy team to identify major sections in the site as well as individual content elements at a screen level. A content matrix is created in unison with a site map. The site map is a visual representation of the site and the content matrix is a textual representation of the content for each screen. The site map identifies screen location codes that will be used by the Content Strategist as he or she begins to describe the specific content for each screen. Creating both at the same time will ensure that the architecture will support the content.

Purpose	• Assist Content Strategy in defining content types that match the organizational structure of the site • Learn more detail surrounding the types of content that will appear at a page level to inform screen detail development • Communicate content needs surrounding interactive elements
Major components	• Organizational structure of content—typically follows existing information architecture • Content types description (static, dynamic, editorial, instructional, etc.) • Content Strategy group will define various content types, which can be very specific to the particular content • Content sources (existing site, collateral, competitive sites) • If the content exists, where is has been found • Recommended next steps (write new, repurpose, edit, use as reference)

Process flows

Activity N: Model processes and activities

🔴 IA owns

Process flows describe in detail the user's interaction with each functional component of the proposed solution. They also outline the underlying system processes that enable this interaction to occur. Process flows provide a detailed visual description of the way the site or application will operate and specify the front-end functionality, which the Technology team will need to support. Process flows differ from site maps in that they convey user decision-making and back-end application processes in addition to the hierarchy of pages. Process flows contribute to the development of the final site architecture, screen details, and interaction prototypes.

Overview

Alternative names	• Interaction flow • Business logic diagram
Purpose	• Describe user and system interaction • Identify logic that underlies the user-facing functionality • Communicate detailed system functionality to programmers • Communicate user and system interactions to clients (who have a technical bias) • Capture and incorporate business processes into functional design
Audience	• Client • Internal team
Major components	• Legend • Numbering system • Diagram • Version number

	• Author • Date
Supporting activities	• Interaction prototyping (low fidelity) • Task analysis • Defining the high level site organization

Recommended steps	• Using the site map, break the site down into distinct areas of functionality, called functional modules or components
	• Start the process flow from the top-level screen of that section/functional module, and end with the confirmation page or the last screen before the beginning of another functional module
	• Using the concept developed for the project and an understanding of the user task to which this functional module corresponds, diagram the application flow and logic as a user would see it, filling the underlying system processes as you go. "Application flow" means programmatic logic involved in:
	    • User interaction on the individual page (e.g., if user chooses a car manufacturer from one pull-down, populate another pull-down with model names)
	    • Exiting a page and moving on to the next screen (e.g., if a user presses "submit" but has not filled out all the fields, return with an error screen)
	• Indicate all interfaces with specific data sets if known
	• Indicate all interfaces with third party systems, packages, or vendors

Software	• Visio • Adobe Illustrator • Inspiration
Contributors	• Technical Architect/Senior Engineers • Design Director • User Research • Content Strategy (if content management system)
Doneness criteria	• All possible steps/error conditions accounted for • All data sources identified • All system-logic documented
Examples	• AutoNation—Process flows • Vitamin Shoppe—User task flows • Kodak Picture Network—Task flows

Example 1: AutoNation—Process Flows (San Francisco)

Unique purpose	• Document the screen flow of a specific functional activity as well as the interaction with back-end systems and servers
Audience	• Internal team
Unique steps	• Each piece of functionality was identified in the site map • Each step of the users activity was mapped to a flow • Documented how that activity interacted with different screen types, information requests, and back-end systems • Validated process flows with team members
Software	• Inspiration
Path and filename	• \5_architect_iterate\process_flows\examples\proc essflows_autonation_adj.pdf

Example 2: Vitamin Shoppe—User task flows (Atlanta)

Unique purpose	• Document the user task flows through specific functionality on the site • Document key assumptions and user decision points
Audience	• Internal team
Unique steps	• Identify functional elements of site • Map user flows through each • Review with team
Software	• Visio
Path and filename	• \5_architect_iterate\process_flows\examples\proc essflows_vitaminshoppe_atl.pdf

Example 3: Kodak Picture Network—Task flows (New York)

Unique purpose	• Document the process flow by key user tasks
Audience	• Internal team • Client – Deliverable for approval or sign-off
Time frame	• Two weeks of iteration
Unique steps	• Identify key users tasks • Map user flows through each task • Review with team
Software	• Adobe Illustrator
Unique contributors	• Site Development
Path and filename	• Not currently available

🔴 IA owns

Prototypes are mock-ups of screen functionality and interfaces used for designing and validating the usability of the screen-level architecture, interaction, and information flow. Prototypes can range from pencil sketches to HTML pages. Prototypes are often done before visual design has started and are used to get feedback from target audiences. This feedback is used to understand how useful and appropriate the ideas are, and to iterate and validate the screen-level architecture and interaction behavior. Interaction prototypes often evolve into and support the high-fidelity interaction prototype. There are three general categories of prototypes: low fidelity, medium fidelity, and high fidelity.

Overview

Purpose	• Assist IAs in designing interactions and testing and experimenting with new technologies or processes • Foster the understanding of potentially complex concepts, task flows, and interactions • Help client and team visualize the site architecture and interaction of the interface • Use for design research and usability testing • Help communicate to Site Developers what to build
Audience	• Client • Internal team
Major components	• Varies by the type of prototype
Supporting activities	• Task analysis, user research, audits • Prototyping
Recommended steps	• Identify key task scenarios to be explored • Determine most appropriate level of fidelity for the prototype • Build prototype • Get feedback from team, client, and target audience • Iterate based on feedback
Software	• Varies by the type of prototype
Contributors	• Content Strategy • Graphic Design • Site Development • XMOD
Doneness criteria	• Feedback can be collected on the task being tested • The prototype can be used to communicate and reference the solution
Examples	• See low-, medium-, and high-fidelity prototype definitions

🔴 IA owns

Low-fidelity prototypes are a quick and easy way of testing out high-level design ideas (i.e., understanding the basic information and interaction flow of a task and what the primary navigation would be to support a specific task) and testing out the behavior of a specific interface element. Low-fidelity prototypes are hand-drawn on paper with the interaction sequence being faked by a person playing the role of the computer. Low-fidelity prototypes can also be executed in drawing programs such as Adobe Illustrator. Low-fidelity prototypes support the design of interface interaction and screen details.

Overview

Alternative names	• Paper prototype
Purpose	• To visualize ideas • To quickly test and explore basic interaction and information flow of a key task or scenario • Get a better understanding of the user task sequence, user experience, and functionality
Audience	• Client • Internal team
Major components	• User task and scenarios • Screen sequence • Nomenclature, navigation, and basic interface elements
Supporting activities	• Task analysis • User research • Concept sketching
Recommended steps	• Identify key task scenarios to be explored • Determine the level of detail needed to communicate the idea • Quickly draw various screen sequences to support the task flow • Get feedback from team, client, and target audience • Iterate prototype based on feedback
Software	• Paper • Pens • Glue • Post-it notes • Video
Contributors	• Content Strategy • Graphic Design • Site Development • Engineers
Doneness criteria	• Feedback can be collected on the task being tested • The prototype can be used to communicate and reference the solution • Sign-off from client
Examples	• United student site—Paper prototype • Peet's Coffee—Paper prototype

Example 1: United student site—Paper prototype (New York)

Unique purpose	• Communicates page elements placement and flow
Audience	• Internal team
Time frame	• Three days of iterative prototyping and user research
Unique steps	• Prototype was later digitized to save on extranet
Software	• Paper
Unique contributors	• Content Strategy • Graphic Design • Site Development
Path and filename	• \5_architect_iterate\interaction_prototypes\low_fidelity\examples\paperprototypes_ual_ny\homepage.html

Example 2: Peet's Coffee—Paper Prototypes (San Francisco)

Unique purpose	• To quickly gather feedback and implement changes to a calendar application model within a compressed time frame
Audience	• Peet's coffee/tea customers and potential Peet's customers
Time frame	• One week (from kickoff meeting to actual paper prototype)
Unique steps	• The six-person project team collaborated in creating the initial interaction flow on a whiteboard • Next the team was divided into two groups to focus on specific task drilldowns • Finally, the team crafted the prototype using craft paper, colored pens, Post-It notes, scissors, glue and correction tape for data fields • Revisions were made between test sessions
Format	• Paper
Unique contributors	• Content Strategy • Graphic Design • Integrated Engagement Leadership
Path and filename	• \5_architect_iterate\interaction_prototypes\low_fidelity\examples\lofi_peets_sf.pdf

Medium-fidelity prototypes   Activity O: Define detail

🔴 IA owns

Medium-fidelity prototypes, like low-fidelity prototypes, are a quick and easy way of testing out high-to low-level navigation and interaction ideas—such as understanding the information and interaction flow of a task, what the various types of navigation would be to support a specific task, and testing out the behavior of a specific interface element. Medium-fidelity prototypes are created and animated digitally and generally contain more detail than low-fidelity prototypes. Medium-fidelity prototypes are primarily created in the "architect and validate the solution" phase of the process. They support the design of the interface interaction and screen details.

Overview

Purpose	• To visualize ideas • To explore the interaction and information flow of a key task or scenario at a more detail level • Get a better understanding of the user task sequence, user experience and functionality
Audience	• Client • Internal team
Major components	• User task and scenarios • Screen sequence • Content, navigation, and interface elements
Supporting activities	• Task analysis • User research • Sketching • Low-fidelity interaction prototyping
Recommended steps	• Identify key task scenarios to be explored • Determine the level of detail and software application needed to communicate the design • Quickly sketch various screen sequences to support the task flow on the computer • Get feedback from team, client, and target audience • Iterate prototype based on feedback
Software	• Adobe Illustrator • Acrobat • MS PowerPoint • MS Front Page, Net Objects Fusion, or other HTML editor • Visio
Contributors	• Content Strategy • Graphic Design • Site Development • Engineers
Doneness criteria	• Feedback can be collected on the task being tested • The prototype can be used to communicate and reference the solution • Sign-off from client
Examples	• First Union Redesign—Prototype • Hallmark Leapfrog v.1—Prototype

Example 1: First Union Redesign—Prototype (New York)

Unique purpose	• Develop prototypes to test the navigation flow for key user tasks • To iterate nomenclature and site organization with user
Audience	• Client • Internal team
Time frame	• One day
Software	• MS PowerPoint
Unique contributors	• Graphic Design • Content Strategy
Path and filename	• \5_architect_iterate\interaction_prototypes\med_fi delity\examples\medfidelityprototype_fub_ny.ppt

Example 2: Hallmark Leapfrog v.1— Prototype (San Francisco)

Audience	• Internal (entire team) • Client
Time frame	• 6 weeks
Unique steps	• Incorporated graphic design into prototypes as UI evolved • End product represented functionality and interface • Simulated functionality using Javascript
Software	• NetObjects Fusion 4.0 • Javascript
Unique contributors	• Graphic Design • XMOD
Path and filename	• \5_architect_iterate\interaction_prototypes\med_fi delity\examples\medfi_hallmark_sf.pdf

Screen details
Activity O: Define detail

🔴 **IA owns**

Screen details are a visual representation of the structure of all elements on a unique screen type. Elements include content, functional, and navigational elements that will appear on every screen type. Screen details do not represent every screen in the site, rather key screens, including every unique screen template the site utilizes. Screen details correspond to the various site maps and process flows that have been created for the different sections of the site.

Overview

Alternative names	• Page-level architecture, wireframes, storyboards, detailed architecture
Purpose	• Design and communicate screen-level details • Understand the implementation scope • Ensure all elements are accounted for on each screen type • Reference for Graphic Designers, Content Strategists, and Technology

	• Think through all data elements at a detailed level
	• To facilitate sign-off of elements on the screen
Audience	• Client
	• Internal team
Major components	• Screen-level description of process flows, navigational structure, visual hierarchy of elements, and preliminary content placement
	• Key interactions and functionality on the screen
	• Relationships between elements
Supporting activities	• Interaction prototypes
	• Content strategy
	• Process flows
	• Site map
Recommended steps	• Determine the level of detail and software application needed to communicate the design
	• Working from the site map, identify unique templates
	• Visually lay out screens and screen sequence
	• Ensure consistent numbering scheme between site map, process flows, and screen details
	• Review screen details with team, client, and users
	• Iterate and refine screen details based on feedback
Software	• Visio
	• Adobe Illustrator
	• QuarkXPress
	• MS PowerPoint
Contributors	• Content Strategy
	• Graphic Design
	• Site Development
Doneness criteria	• Feedback can be collected
	• Approval and sign-off from client, Technology, Graphic Design, Content Strategy, and Site Development
	• Screen details communicate all necessary elements with comments describing conditions and functionality
	• Any open issues are clearly identified and labeled
	• Pages have been usability tested
Examples	• Vitamin Shoppe—Wireframes
	• Realtor.com—Interaction design
	• AutoNation—Storyboards

Example 1: Vitamin Shoppe—Wireframes (Atlanta)

Unique purpose	• Document how the navigational model would grow for each page level
Audience	• Internal team
Time frame	• Nine revisions over a four-week span
Unique steps	• The page-level architecture was created as a first step
	• Details for each page type were sketched and then

	documented in Visio
	• Design decisions made about how content would surface and what navigation would be available
	• Determined changes to the site map
Software	• Visio
Path and filename	• \5_architect_iterate\screen_details\examples\wire frames_vs_atl.pdf

Example 2: Realtor.com—Interaction design (San Francisco)

Audience	• Internal team, client
Software	• Adobe Illustrator
Path and filename	• Not available at this time

Example 3: AutoNation—Storyboards (San Francisco)

Unique purpose	• Attempts to do very little layout, leaving page structure for Graphic Design
Audience	• Internal team,
	• Client review
Time frame	• Two weeks
Software	• MS PowerPoint – allows for quick development and on screen presentation with some click through functionality. Limits some of the detail that can be put into design.
Path and filename	• \5_architect_iterate\screen_details\examples\stor yboards_au_adj.pdf

Screen list   Activity O: Define detail
🔴 IA owns

The screen list is a spreadsheet that contains an inventory of all the unique screen types in the final application or site. Each screen is identified by name, description, and a unique ID number. Over time, the list can include other attributes like screen type, template type, and category. The ID number identifies the unique page and indicates its relative hierarchy in the overall site. The ID number should be used not only in the screen list, but also on site maps, process flows, and screen details. The screen list is created after the site map and screen details have been completed. It supports planning and scoping implementation and creating template and functional specifications.

Overview

Alternative names	• Page inventory, template list
Purpose	• To catalog and number every unique screen in the site for use as a reference tool for all other disciplines.
	• Provides a way to track all pages to be built out
Audience	• Internal team
Major components	• List of all screens on site
	• Unique ID Numbers
	• Page names and descriptions

Supporting activities	• Final site map • Screen details • Interaction prototypes
Recommended steps	• Identify all screens in site based on site map, process flows, and screen details • Identify all attributes that need to be captured • Create a list with all attributes of each screen • Review with team • Publish and iterate as project progresses
Software	• MS Word • MS Excel
Doneness criteria	• All screens are on the list • All needed attributes are on the list • Validated with team
Examples	• AutoNation—Content page inventory • BCI Screen—screen list

Example 1: AutoNation—Content page inventory (San Francisco)

Unique purpose	• Identify the individual content elements that will be on each page in the site • Provide a tool for the team to use for the development of screens and content
Audience	• Internal
Software	• MS Excel
Path and filename	• \5_architect_iterate\screen_list\examples\contentl ist_autonation_adj.pdf

Example 2: BCI—Screen list (Cambridge)

Unique purpose	• Shared list used by IAs to track the screens in the site, by Associate Project Managers to track doneness and user testing, and by Technology to build the site and the types of pages • Use of color allows a visual hierarchy to break up the information • Used by development team to create project plan; subsequently, became audit trail
Audience	• Internal team
Unique steps	• Identify all screens in site based on site map • Identify all attributes that need to be captured • Create a list with all attributes of each screen • Review with team • Publish
Software	• MS Excel
Path and filename	• \5_architect_iterate\screen_list\examples\screenli st_bci_cam.pdf

● IA owns

The screen template system is a definition and documentation of the unique screen templates and components for a site or application. This document identifies, assigns names, assigns numbers, and describes the different types of templates and components that will be used in the site or application under development. Unlike the screen list that identifies every discrete screen in the final solution, this document only identifies templates and their components. A single template may correspond to many discrete pages on the screen list. The screen template system is used by Graphic Designers, Engineers, and Site Developers to standardize the visual presentation of similar screens on the site, and optimize their work. The screen template system supports the development of the functional specification.

Overview

Alternative names	• Template list • Screen type analysis
Purpose	• To consolidate and communicate templates and template components to the team • To catalog and describe each unique template and component within a site • To help understand the relationship and uniqueness of each template and component • To validate estimation • Tracking tool for Graphic Designers, Engineers, and Site Developers
Audience	• Internal team
Major components	• Name of template or component • Description • Filename • Screens associated with each template or component • Version number
Supporting activities	• High-fidelity prototype • Final interface design
Recommended steps	• Identify all pages from site architecture that are a basis for other similar pages • Create a name for each template page • Review list with internal team • Review list with client • Publish list
Software	• MS Word • MS Excel
Contributors	• Graphic Design • Content Strategy • Site Development • Technology
Doneness criteria	• All disciplines have reviewed the list, especially Graphic Design, Technology, and Content Strategy
Examples	• First Union—Screen templates • EuropeInvest—Template system

Example 1: First Union—Screen templates (New York)

Unique purpose	• Provides a description of each screen along with related templates or components and examples
Audience	• Internal team
Time frame	• 3 days, iterating the system
Unique steps	• All unique screens were taped on the wall • The team went through each screen identifying unique characteristics, deleting redundant characteristics • Each unique template and component was identified and attributes and use specified
Software	• MS Excel
Unique contributors	• Site Development • Graphic Design • Content Strategy
Path and filename	• \5_architect_iterate\template_system\examples\templatelist_fub_cam.pdf

Example 2: EuropeInvest—Template system (Cambridge)

Unique purpose	• Web-based screen list provides everyone with easy access to the template mockup files • Allows tracking of approval status, and provides visibility of same to everyone
Audience	• Internal team
Unique steps	• Identify all pages from site architecture that are a base for other similar pages • Create a name for such template page • Number the pages • Review the list with other disciplines • Review list with client • Publish
Format	• HTML
Path and filename	• \5_architect_iterate\template_system\examples\templatelist_europeinvest_cam.pdf

Data specifications   Activity O: Define detail

🔴 IA partly owns

Data specifications result from the process of data validation, a process for identifying UI and data field elements and testing data validity. Data specifications should clearly document how errors will be communicated to the user. When done correctly, data specifications improve the system's tolerance for handling different forms of the same data and help the Technology team separate complex code from the code that works with submitted data. Data specifications are preceded by screen details, and are incorporated into the functional specification.

Overview

Purpose	• Improve the user experience and provide guidelines for programmers to build to • All interfaces imply underlying data structures and rules. This documents them, rather than having the Technology team guess. • Reduce level-of-effort (LOE) by preventing assumptions that lead to incorrectly designed back-end systems • Improve the user experience by designing better validation requirements from the beginning • Reduce Per-Day-Rate (PDR) erosion • Next step in tying UI design patterns to object oriented design patterns
Audience	• Internal team
Major components	• Data entered by user or received from a feed • Required relationships among data • Events that trigger data validation • Events that affect visible controls—actions taken when data is invalid and messages are presented to the user
Recommended steps	• Determine what type of data validation needs to occur on the screen • Specify validation behavior for each data type—what is checked, when is it checked, and what are the success and failure results? • Determine control-level attributes • Identify validation events—what instigates the data validation process • Determine validation group behavior • Refine data type hierarchy • Examine validations to be performed on each event • Document the validation behavior
Software	• MS PowerPoint • MS Word • Freehand/Adobe Illustrator • MS Visual Basic/C++
Contributors	• Technical Architect/Senior Engineer
Doneness criteria	• Data-type hierarchy is complete. • Documented in screen narrative.

Functional specification   Activity Q: Complete architecture documentation

● IA owns

The functional specification defines exactly what functionality Sapient will be building into the project. This document represents an evolution of the screen details and describes the technical details of each screen and functional component to aid in the technical design process. Usually a large document, the functional spec (as it is often called) takes each screen detail and builds upon it, adding data specifications, error states, an inventory of the navigation choices for the screen, as well as details surrounding the components of the system on which this piece of the solution depends (databases, system interfaces, feeds, etc). The functional specification is preceded by a site map, process flows, final concept, screen details, and data specifications. The functional specification feeds the technical design and implementation efforts of the Technology team.

Overview

Purpose	• To document the functional details of a design and communicate these to all team members • A central communication vehicle from which all disciplines can work • Formal documentation of a product's behavior and design • A means to capture all issues, ideas, and resolutions in context and in one place • A document to facilitate meetings and discussions • A means to think through a design, a solution, a problem
Audience	• Client • Internal Team
Major components	• Overview • Audience • Front-end/client-side benchmarks • Open issues list • High-level screen flow or process flow • Screen shots of screen detail or prototype screens • Design specifications per screen • List of interaction per screen • List of fields per screen • List of referring screens • Error messages per screen • Author name • Sign-off sheet • Version number • Date
Supporting activities	• Final site map • Final process flows • Screen details
Recommended steps	• The functional spec. may be started at any time in the project after the concept has been established. But since the functional spec. is based on

	individual screens, a good time to start is when the IA is working on screen details and process flows. • Write the overview for the functional spec. and include paragraphs for why it's important, the intended audience, and a high-level overview of the project • Write a brief description of each page • For each page document the interactions intended for the page; include screen shots and error messages • As issues arise, document them in the open issues section • Review with internal team • Have the functional specification available to refer to at all team meetings • Revise as needed, closing open issues • Review with client if necessary • Publish to team
Software	• MS Word • QuarkXPress
Contributors	• Technical Architect/Senior Engineers • Site Developer
Doneness criteria	• All open issues have been closed • Development can build from it • Reviewed and signed-off by all team members • Reviewed and signed-off by client
Examples	• Nordstrom Shoes—functional spec • SpringStreet—functional spec

Example 1: Nordstrom Shoes—Functional spec (San Francisco)

Unique purpose	• Document the technical requirements and functional components of the live site as well as the managing interface for the site
Audience	• Internal, client development team
Software	• MS Word with PowerPoint screen grabs
Path and filename	• \5_architect_iterate\func_spec\examples\funcspec _nordstrom_adj.pdf

Example 2: SpringStreet—Functional spec–(San Francisco)

Unique purpose	• Capture design ideas, strategies, and issues from various cross-functional meetings
Audience	• Internal
Software	• Visio
Path and filename	• \5_architect_iterate\func_spec\examples\funcspec _springstreet_sf.vsd

 IA partly owns

High-fidelity prototypes are a way of testing out the design system and usability of the interface and interaction solutions before final implementation. High-fidelity prototypes typically include the final graphic design, content, navigation and as much feature functionality as possible. High-fidelity prototypes are created and animated digitally.

Overview

Purpose	• To integrate all solutions from each of the creative practice • To help finalize the design system for the interface • Test the feasibility of final design solutions • Test usability of final design solutions • To begin HTML templates for implementation • Help facilitate client sign-off
Audience	• Client • Internal team
Major components	• User task and scenarios • Screen sequence • Final content, navigation, and detail interface elements • Unique screen templates
Supporting activities	• Screen detailing • Interaction prototyping • Defining the screen template system
Recommended steps	• Identify key task scenarios and screen types to be prototyped • Determine the level of detail and software application needed to communicate the design • Provide the graphic designers, content strategists and site developers with screen details or prototypes of the screens • Review and test the prototype • Get feedback from team, client, and target audience • Iterate prototype based on feedback
Software	• Adobe Illustrator • HTML • Director
Contributors	• Content Strategy • Graphic Design • Site Development • Technology
Doneness criteria	• Feedback can be collected on the task being tested • The interface is usable by target audience • Sign-off from client
Examples	• United Redesign • Hallmark Leapfrog v.8

Example 1: United Redesign—High-fidelity prototype (New York)

Unique purpose	• The screen details became the high-fidelity prototype
Audience	• Internal • Client – Deliverable for approval or sign-off
Time frame	• Two weeks
Unique steps	• Information Architects created the screen details with HTML links • Graphic Designers and Content Strategist worked off the same files and developed the visual design and content • The screens were constantly iterated until the team had developed a strong design system for the interface
Software	• Adobe Illustrator (exported as full screen gifs with HTML links)
Unique contributors	• Graphic Design • Content Strategy • Site Development
Path and filename	• \5_architect_iterate\interaction_prototypes\high_fidelity\examples\highfidelityprototype_ual_ny\home.html

Entry criteria
- functional specifications are final
- findings from prototype testing have been incorporated
- IA documentation validated by and delivered to the project team and client
- open issues resolved
- locked scope
- process for QA defined
- schedule for build releases created
- **client consensus and sign-off**

S
Review site build

T
Issue resolution

GUI + HTML

site goes live

Exit criteria
- screen freeze designated
- all interface TARs are resolved
- maintenance plan is defined
- functional specifications updated to reflect changes
- **client consensus and sign-off**

Step 6: Implement and test the design

Step 6 overview
In this step the IA team is responsible for maintaining the integrity of the design by assisting the graphic designers with screen extension, the site developers with template development, and the technology team with the testing.

Key goals:
- Log Interface and interaction TARs into system
- Inform development with knowledge of information architecture
- Fix problems through redesign
- Maintain design integrity

Key activities:
- S. Review site build
- T. Issue resolution and quality control

Key interactions with other team members:
- Work with Graphic Design to ensure the visual designs match the architecture
- Work with Content Strategy to ensure the placement of content
- Work with Site Development to ensure front-end functionality matches the architecture
- Work with Technology to interpret the functional specification and implement the functional design
- Work with Technology to submit and resolve TARs

Deliverables by activity:
- S. Review site build
  - Update functional specifications (see step 5) ◗
- T. Issue resolution and quality control
  - TARs ◗

Length of step:
- Six to 20 weeks depending on scope and complexity
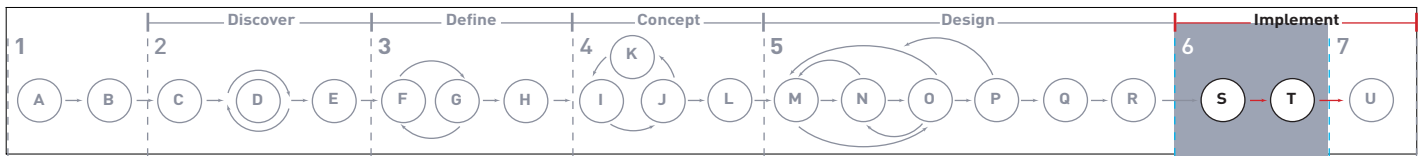
Step 6 activities

S. Review site build

Once the architecture documentation has been delivered, the IA team should first work closely with the Graphic Design team and Content Strategy team, and later with the Site Development team. This will ensure the visual interface adheres to the information architecture and that everyone fully understands the logic behind the interaction design.

The following things must be reviewed for their integration with or adherence to the information architecture:
• Templates (App server & HTML)
• Visual assets
• Content
• Front-end functionality
• Interface feedback (i.e., what is the screen doing to let the user know that something is happening)
• System response performance
• Error messages

In the course of developing the back-end functionality for the site, the Technology team will inevitably discover gaps or discrepancies between the system's capabilities and the interaction design. Such gaps will require design changes, additional screens, and perhaps even reworked functionality.

When the changes to the interaction are significant, it may be prudent to quickly test the new design for usability.

Techniques:
• Informal usability testing
• Scripted reviews based on test plan
• Make design changes
• Update the functional spec

Team members involved:
• IA
• Technology
• Graphic Design
• Content Strategy

Length of activity:
• Ongoing as visual designs are developed, refined, and extended
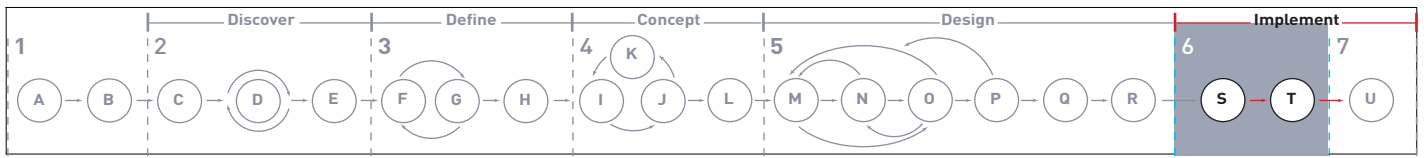
T. Issue resolution and quality control

During the testing and alpha launch of the solution, the IA team serves for the Technology team in much the same capacity as they did for Graphic Design and Site Development—answering questions, informing development, addressing any implementation issues that may arise, and fixing and changing the interaction if necessary.

Submitting TARs is a key activity for the IA team once testing is under way. This is the method by which problems with the implementation of the solution can be fixed, and it is a key means of documenting the changes that inevitably need to be made to the architecture and design in this step.

Once a problem has been identified, design changes both to the front and back end may need to be made, and in the event of such changes, the specs must be altered to reflect the new state. In some cases, the design change may also merit a round of usability testing to validate that the change doesn't represent a decline in quality of the user experience.

Techniques:
- Group meetings
- QA testing
- Webtracker TAR submissions
- Design adjustments
- Informal usability testing

Team members involved:
- Entire team

Length of activity:
- Ongoing activity throughout the remainder of the project

Step 6 deliverables

Note: All deliverable examples discussed in this section can be found on the Sapient network at \\webteam\information_architecture\deliverables

TARs   Activity T: Issue resolution and quality control
🔴 IA partly owns

A TAR (Technical Assistance Request) is a documented issue or bug in a system that needs resolution or needs to be fixed. TAR lists are created to track issues surrounding the final builds or coded screens of a solution. The entire team generates TARs and manages their resolution. Information Architects contribute to identifying TARs that deal with all aspects of the solution, but generally focus on TARs for the interface, interactivity issues, navigation, and functionality. All TARs are given a prioritization ranking from P1 to P4, where P1 TARs are of the highest importance. Information Architects are involved in determining how user interface and information architecture issues are prioritized.

Overview

Alternative names	• Bugs
Purpose	• Create an audit trail for issues that need resolution • Maintain creative involvement in quality assurance • Elevate UI issues for resolution to same level as functional issues • Allows IA to systematically review final work
Audience	• Internal team
Major components	• Author • Owner • Priority • Short Description • Long Description • Screenshot
Supporting activities	• TAR resolution meetings • Testing planning activities
Recommended steps	• Determine prioritization of IA-related issues • Review build • Identify issue • Write short description • Write a detailed description explaining context and possible solutions and/or next steps • Identify any possible dependencies or impact of change on other sections • Include snapshot of specific screen where issue appears • Check on status • Attend TAR resolution session if necessary
Software	• Tracker (VB version) • Web Tracker
Contributors	• Entire team
Doneness criteria	• Descriptions are clear • Issue is reviewed with appropriate parties • Issue is resolved satisfactorily

	• Documentation assigned owner to resolve the problem quickly and efficiently
Examples	• Smith & Noble—Sample TAR

Example 1: Smith & Noble—Sample TAR (Cambridge)

Unique purpose	• This is the best way to ensure UI changes are incorporated once implementation is underway
Audience	• Internal team
Unique steps	• Identify proper levels and categorization for IA-related TARs • Write a detailed description explaining context and possible solutions and/or next steps • Identify any possible dependencies or impact of change on other sections • Include snapshot of specific screen where issue appears
Software	• Web Tracker
Path and filename	• \6_validate_test\tars\example\tars_smithnoble_cam.pdf

Entry criteria
- defined maintenance plan
- functional specifications updated to reflect changes
- access to feedback (client, user, and server logs)
- list of issues created
- implementation complete

U
Transfer knowledge

site goes live

Exit criteria
- performance measured (metrics)
- cause of issues identified
- lessons learned are identified
- recommendations made for next steps
- client fully understands site architecture and implementation
- metrics determined for post-launch success evaluation

Step 7: Transfer knowledge

Step 7 overview

Once the solution has been launched and major TARs have been resolved, the IA team must help the client understand the architecture of the solution that has been created, especially in the event of a transition to client development/support team. The Information Architects must also develop documentation of the solution to share with the larger IA community and the company as a whole.

Key goals:
- Make sure client team understands the architecture and the principles on which it was built
- Identify lessons learned
- Record specialized or unique solutions for re-use later

Key activities:
- U. Transfer knowledge (to client, Sapient support team, and IA practice)

Key interactions with other team members:
- Work with Technology to understand site performance and outstanding issues

Deliverables by activity:
- U. Transfer knowledge (to client, Sapient support team, and IA practice)
  - Case study ●
  - Style guide ◑
  - IA Training materials ●
  - Planning and facilitation of workshops ◑

Length of step:
- Typically one to four weeks
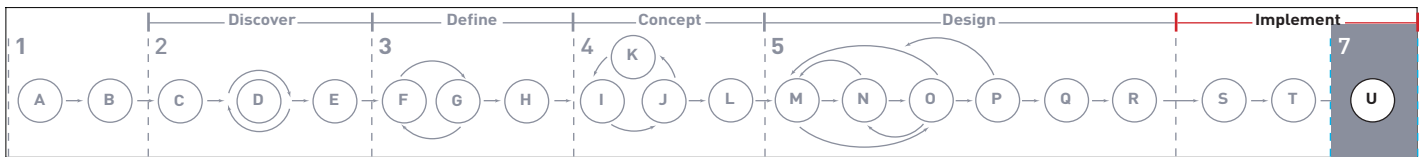
Step 7 activities

U. Transfer Knowledge

The final responsibility of the IA team on any project involves documenting and transferring knowledge to clients, the support team (internal Sapient), and the IA practice.

IA knowledge transfer to clients consists of educating the client to be able to understand, support, and make changes to the solution after the engagement. The functional spec and style guide serve as the primary tool to facilitate this exchange.

The knowledge transfer to the Sapient support team is very similar to client knowledge transfer. This team must understand how the solution has been architected, how to make changes, and what the criteria and strategies should guide further development.

In the case of the IA practice, the IA team should write a case study of the project and fully document the architecture of the final solution. The IA team should describe the unique problems that this project presented and how they were solved, both in terms of process and design. If there are components of the architecture that will be reusable for future projects, those should be standardized and archived. If any piece of the architecture lends itself to becoming a design pattern, one should be created.

Techniques:
- Detailed documentation
- IA team meeting
- Design patterns
- Process documentation
- Workshops

Team members involved:
- IA team
- Project team members

Length of activity:
- Less than 2 weeks

Step 7 deliverables

Note: All deliverable examples discussed in this section can be found on the Sapient network at \\webteam\information_architecture\deliverables

Case study   Activity U: Transfer knowledge

🔴 IA owns

A case study is an analysis of the project. It can include lessons learned, new problem-solving methods and techniques developed by the team, a summary of the timeline and project approach. Case studies are a key form of education communication both internally and externally.

Overview

Purpose	• Share experiences and lessons learned with people not on the project • Better understand the activities and techniques developed on a project • Communicate innovation and process evolution on a project
When	• After project work has ended
Audience	• Internal team • Client
Major components	• Timeline • Steps in the process • Lessons learned • Examples of deliverables and activities
Supporting activities	• Final implementation
Recommended steps	• Team meeting to discuss process, key points in the project, lessons learned • Identify the audience and format of the case study • Each team member develops an aspect of the case study • The case study is integrated and presented by whole team
Software	• Director • MS PowerPoint • MS Word • QuarkXPress
Contributors	• All team members
Doneness criteria	• All team members review and agree on content • Communicates key messages
Examples	• Sallie Mae—Case study

Example 1: Sallie Mae—Case study (Atlanta)

Unique purpose	• Document the project history and information architecture process including key activities, deliverables, and lessons learned for each phase of the project.
Audience	• Internal team
Time frame	• One week
Unique steps	• The task flow for each phase of the project for the IA is documented and represented visually as a task model. This is typically done by the IA on the project or newer IAs reviewing the project. • A short written document is written to support the visual model that communicates key details about the project
Software	• MS Word • Visio
Path and filename	• \7_xfer_knowledge\case_study\example\casestudy _salliemae_atl.pdf

Style guide
Activity U: Transfer knowledge

🔴 IA partly owns

A style guide is a specification of the design system for implementation and maintenance of the front end of a site. It explains how to use the design system to ensure consistency throughout the site.

Overview

Purpose	• Communicate design system--including the information architecture of a site • Help the client build and maintain the consistent brand experience
Audience	• Client
Major components	• Strategy of design system • Definition of design system by practice area • Templates or tools to help the creation and maintenance of graphics, content, or features

IA training materials
Activity U: Transfer knowledge

🔴 IA owns

Training materials are documents and presentations created to communicate a specific methodology or technique. Training materials support the communication of new ideas and help to educate both the client and internal teams.

Overview

Purpose	• Educate and communicate information architecture ideas and methods
Audience	• Client • Internal team
Major components	• Varies based on need

🔴 IA partly owns

Workshops are often done at the end of projects to educate the client or production team on how to build and maintain the site—this can include how to build new screens to how to write the content for the site.

Overview

Purpose	• Ensure that information architecture topics are clearly communicated • Support the team through a presentation or workshop
Audience	• Internal team • Client

Creating solutions in multidisciplinary teams

Solution

1 What's desireable?

2 What's viable?

3 What's feasible?

4 scope

user-centered design

business strategy

technology
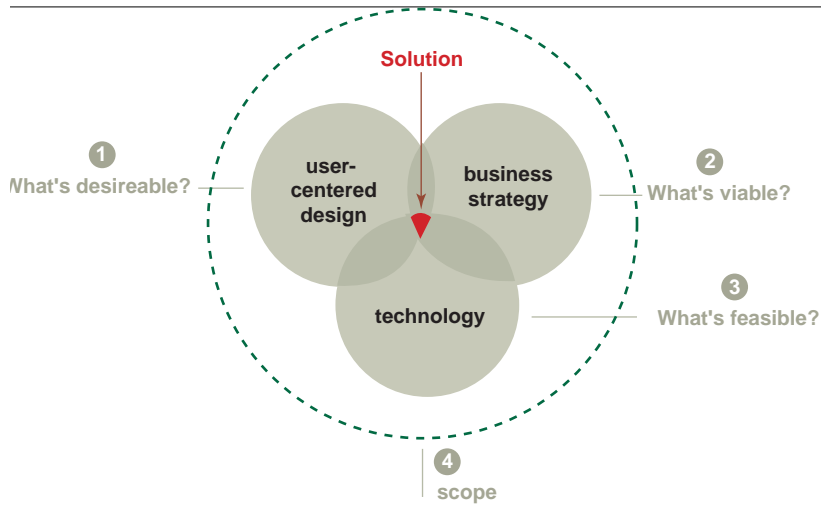
Sapient's different practices approach problems in a multidisciplinary way because each brings different expertise to bear on the development of a complete solution.

During a typical client engagement, a multidisciplinary team attempts to reconcile three different project dimensions – user needs, business strategy, and technology capabilities into a solution. In addition, the team manages the overall scope of the project.

In the dimension of user-centered design, the team's focus is on learning what's needed and desirable for users. In the dimension of business strategy, it's about what creates a viable and profitable business. In the technology dimension it's about what infrastructure is necessary and feasible to enable business operations.

The diagrams on the following pages examine the manner in which IAs work with other practices to develop understanding within the context of these three different dimensions as well as the overall project scope. Each diagram highlights the sequence of activities which contributes most strongly to the understanding of a particular dimension. As each activity leads to the next, the resulting path demonstrates how IAs resolve different aspects of a solution in conjunction with other practices. The resulting deliverables that occur in step with these activities show our contribution to other practices' understanding as well as to the development of an overall solution for our clients.

The solution results from reconciling these three dimensions: user needs, business strategy, and technology capabilities.

Information Architecture Collaborations with User-Centered Design

Solution — user-centered design / business strategy / technology — scope

Discover	Define	Concept	Design	Implement

1 Pre-project
2 Understand the context & scope
3 Synthesize the variables Ł / Define the problem and opportunities
4 Explore possibilities
5 Architect and iterate the solution
6 Validate and test the design
7 Transfer knowledge

Process path

- IA pre-project entry point
- IA project entry point

A Participate in client pitch
B Inform proposal
C Review proposal
D Establish project context & focus
E Plan process revise scope — project plan
F Conduct focused research
G Synthesize info.
H Define problem — definition document
I Develop concepts
J Evaluate concepts
K Refine concepts
L Choose concept — final concept
M Create site structure — site map
N Model processes/activities — process flows
O Define detail — screen details
P Evaluate, + validate architecture
Q Complete architecture docs. — IA docs to project team
R Review GUI design — GUI + HTML
S Review site build
T Issue resolution — site goes live
U Transfer knowledge

✓ team process plan

Process activities

A Participate in client pitch
- participate in knowledge Ł transfer from client
- educate client about creative roles

B Inform proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, resources, and schedule

C Review proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, Ł and schedule

D Establish project context & focus
- determine client drivers for the project
- understand client expectations for deliverables
- clarify project objectives and vision
- determine the critical success factors
- identify risks
- participate in knowledge transfer from client for:
  - client organizational structure
  - industry context
  - competitors
  - stakeholders
  - business requirements
  - market research + other information on user audiences
  - client strengths and weaknesses
  - constraints and opportunities
  - requirements for the end product/solution
  - technology capabilities
  - project historical context: with Sapient and/or others
- conduct a user experience analysis of client Web site
- summarize the findings
- identify information gaps in knowledge transfer and what's needed to fill the gaps

E Plan process + revise scope
- develop a team process plan
- review team roles and responsibilities
- revise project schedule
- revise proposal (as needed)

F Conduct focused research
- define criteria for evaluating the research and the metrics for measuring it
- identify the appropriate formats for capturing research
  - *business*
    - understand industry context
    - determine the business drivers
    - define best practices
    - analyze the current state of client's business model, products, and services
    - conduct a competitive audit
  - *users*
    - identify the user audiences
    - participate in primary and secondary research on audiences and user needs
  - *technology*
    - develop package selection criteria based on the research findings

G Synthesize information
- distill research into findings and visual information models
- identify patterns in the findings and models
- identify initial areas of opportunity based on the research findings and models
- validate findings with client and users
- evaluate potential packages

H Define problem
- define the business problem
- validate the problem against project objectives, vision, and opportunities
- perform an initial reconciliation between business viability, user needs, and Ł technology capabilities
- identify a (high-level) set of features and reconcile with project scope
- recommend potential solutions
- propose a strategy for moving forward

I Develop concepts
- continue reconciliation of business viability, user needs, and technology capabilities
- brainstorm concepts
- participate in developing a plan for user research
- participate in user field research
- develop user scenarios
- sketch potential concepts + associated features
- create concept and organizational models
- collaborate in creating the plan for user testing

J Evaluate concepts
- create concept prototypes
- test concepts and/or concept prototypes with users
- analyse test findings with team
- make recommendations to client

K Refine concepts
- incorporate feedback and evaluations from testing into revising the concepts
- iterate through testing, feedback, evaluation, and revision as needed.

L Choose concept
- select a concept(s)
- document concept(s)
- present concept(s)
- revalidate the scope matrix

M Create site structure
- interpret concept into a high-level site architecture
- group content into primary sections for the site
- explore navigational models and relationships among content, functionality, and the sections of the site
- develop initial nomenclature for site sections
- define the page types and develop a numbering system
- review the types of content and the content hierarchy
- organize and group existing content
- identify functionality that needs technical exploration

N Model processes & activities
- define interactions between and within the site sections
- model user tasks and data inputs/outputs to the system
- identify the functional elements that are similar or repeating in different areas of the site and make consistent
- identify data feeds, interactions with outside systems
- validate process flows with appropriate team members
- identify the areas for instructional copy
- identify complex areas, new interaction models for testing
- collaborate in creating the plan for user testing
- revise site architecture to reflect final process flows

O Define detail
- devise a template system for unique screens and screen components in the architecture
- inventory the site and list the pages
- create screen details consisting of page level navigation, content types, and functional elements
- design the functional elements based on user tasks
- utilize standard notation in creating screen details
- develop a prototype for user testing with screen details
- ensure consistency of interaction behavior in prototypes
- identify interaction areas for further innovation
- define data format specifications
- revise site architecture and process flows based on screen details

P Evaluate & validate architecture
- determine the documentation format for recording user feedback from prototype testing
- test the interaction prototypes with users
- evaluate test results with team
- revise the interaction prototypes based on evaluation
- iterate through testing, feedback, evaluation, and revision as needed
- validate the final design solutions with team members

Q Complete architecture documentation
- revise site architecture documentation: detail screens, process flows, site map
- plan production schedule with other team members
- review process flows with appropriate team members
- revise the screen list and numbering system [2]
- revise the template system and screen components in the architecture
- review screen details and site map with team members
- collaborate on the review of screen details for nomenclature, logic, and adherence to rules of CMS
- validate package functionality/requirements
- develop data specifications at the page level
- collaborate on writing functional specifications
- ¼ deliver completed IA docs to project team and client

R Review GUI design
- collaborate on the interaction design: interpretation of navigation, screen functionality, layout
- review GUI design for adherence to IA docs
- assist in selecting key pages for client presentation
- ensure page designs meet browser technical standards
- collaborate on the high-fidelity prototype
- refine template system based on finalization of GUI
- revise the functional specifications
- ¼ lock scope

S Review site build
- review the integrated build including:
  - navigation
  - content
  - assets
  - design
  - information architecture
  - functionality
  - system responses and performance
- make design adjustments
- participate in testing the build
- update functional specifications

T Issue resolution + quality control
- participate in QA testing
- make QA notes
- submit TARs
- make design adjustments
- update TAR
- update specifications
- retest new build

U Transfer knowledge to the back end
- incorporate feedback from server logs, client, and users
- resolve issues from gaps between design and implementation steps

Transfer knowledge to the client
- maintain integrity and functionality of the site

Transfer knowledge to the IA practice
- document project findings in a case study
- communicate feedback to IA practice and to other project teams

Deliverables

A Participate in client pitch
- client educational material

B Inform proposal
- proposal

C Review proposal
- (none)

D Establish project context & focus
- summary of findings

E Plan process + revise scope
- internal educational materials
- summary of findings
- project plan that consists of: revised proposal (as needed), team process plan, project schedule
- strategy document

F Conduct focused research
- current site map
- user experience audit
- current site audit
- competitive audit
- package selection criteria

G Synthesize information
- user task models
- informational diagrams
- user audience models
- user profiles
- user scenarios
- secondary research findings
- executive interview findings
- package evaluation document

H Define problem
- (high-level) feature list
- definition document
- scope matrix

I Develop concepts
- concept models
- user task models

J Evaluate concepts
- concept prototypes
- user testing findings

K Refine concepts
- revised concept(s)

L Choose concept
- feature list
- concept document

M Create site structure
- site map
- content matrix

N Model processes & activities
- process flows

O Define detail
- screen details
- interaction prototypes (low or mid-fidelity)
- screen template system
- screen list
- data specifications

P Evaluate & validate architecture
- user testing findings

Q Complete architecture documentation
- functional specifications
- site map
- screen details
- screen list
- screen template system
- process flows
- data specifications
- content matrix

R Review GUI design
- high-fidelity prototype

S Review site build
- update functional specifications

T Issue resolution + quality control
- TARs
- update functional specifications

U Transfer knowledge to the back end
- operation report

Transfer knowledge to the client
- IA training materials
- planning and facilitation workshops
- style guide

Knowledge transfer to the IA practice
- case studies

Key
- ● deliverables owned by IA
- ◑ deliverables partly owned by IA
- ○ deliverables that IA has input to or consents to
- ✓ team process plan — review and update team process plan before beginning each new project phase
- ◆ project milestones + client sign-off points

Practice and discipline abbreviations:
- BS digital business strategy
- B brand strategy
- CS content strategy
- GD graphic design
- IA information architecture
- EL integrated engagement leadership
- SD site development
- T technology
- X XMod

Information Architecture Collaborations with Business Strategy

Solution
- user-centered design
- business strategy
- technology
- scope

Phases

Discover	Define	Concept	Design	Implement

1 Pre-project
2 Understand the context & scope
3 Synthesize the variables Ł / Define the problem and opportunities
4 Explore possibilities
5 Architect and iterate the solution
6 Validate and test the design
7 Transfer knowledge

Process path

- IA pre-project entry point
- IA project entry point

✔ team process plan

- **A** Participate in client pitch
- **B** Inform proposal
- **C** Review proposal
- **D** Establish project context & focus
- **E** Plan process revise scope → project plan
- **F** Conduct focused research
- **G** Synthesize info.
- **H** Define problem → definition document
- **I** Develop concepts
- **K** Refine concepts
- **J** Evaluate concepts
- **L** Choose concept → final concept
- **M** Create site structure → site map
- **N** Model processes/ activities → process flows
- **O** Define detail → screen details
- **P** Evaluate, + validate archi-tecture
- **Q** Complete architecture docs. → IA docs to project team
- **R** Review GUI design → GUI + HTML
- **S** Review site build
- **T** Issue resolution → site goes live
- **U** Transfer knowledge

Process activities

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- participate in knowledgeŁ transfer from client
- educate client about creative roles

B Inform proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, resources, and schedule
(BS B X GD CS T)

C Review proposal (BS B X GD CS T)
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, Ł and schedule

D Establish project context & focus
- determine client drivers for the project
- understand client expectations for deliverables
- clarify project objectives and vision
- determine the critical success factors
- identify risks
- participate in knowledge transfer from client for:
  - client organizational structure
  - industry context
  - competitors
  - stakeholders
  - business requirements
  - market research + other information on user audiences
  - client strengths and weaknesses
  - constraints and opportunities
  - requirements for the end product/solution
  - technology capabilities
  - project historical context: with Sapient and/or others
- conduct a user experience analysis of client Web site
- summarize the findings
- identify information gaps in knowledge transfer and what's needed to fill the gaps

E Plan process + revise scope
- develop a team process plan
- review team roles and responsibilities
- revise project schedule
- revise proposal (as needed)

F Conduct focused research (BS B X T)
- define criteria for evaluating the research and the metrics for measuring it
- identify the appropriate formats for capturing research

business (BS B X T)
- understand industry context
- determine the business drivers
- define best practices
- analyze the current state of client's business model, products, and services
- conduct a competitive audit

users
- identify the user audiences
- participate in primary and secondary research on audiences and user needs

technology
- develop package selection criteria based on the research findings

G Synthesize information
- distill research into findings and visual information models
- identify patterns in the findings and models
- identify initial areas of opportunity based on the research findings and models
- validate findings with client and users
- evaluate potential packages (BS B X T)

H Define problem (BS B X T)
- define the business problem
- validate the problem against project objectives, vision, and opportunities
- perform an initial reconciliation between business viability, user needs, and Ł technology capabilities
- identify a (high-level) set of features and reconcile with project scope
- recommend potential solutions
- propose a strategy for moving forward

I Develop concepts (B X T GD CS)
- continue reconciliation of business viability, user needs, and technology capabilities
- brainstorm concepts
- participate in developing a plan for user research
- participate in user field research
- develop user scenarios
- sketch potential concepts + associated features
- create concept and organizational models
- collaborate in creating the plan for user testing

J Evaluate concepts
- create concept prototypes
- test concepts and/or concept prototypes with users
- analyse test findings with team
- make recommendations to client

K Refine concepts
- incorporate feedback and evaluations from testing into revising the concepts
- iterate through testing, feedback, evaluation, and revision as needed.

L Choose concept
- select a concept(s)
- document concept(s)
- present concept(s)
- revalidate the scope matrix

M Create site structure
- interpret concept into a high-level site architecture
- group content into primary sections for the site
- explore navigational models and relationships among content, functionality, and the sections of the site
- develop initial nomenclature for site sections
- define the page types and develop a numbering system
- review the types of content and the content hierarchy
- organize and group existing content
- identify functionality that needs technical exploration

N Model processes & activities
- define interactions between and within the site sections
- model user tasks and data inputs/outputs to the system
- identify the functional elements that are similar or repeating in different areas of the site and make consistent
- identify data feeds, interactions with outside systems
- validate process flows with appropriate team members
- identify the areas for instructional copy
- identify complex areas, new interaction models for testing
- collaborate in creating the plan for user testing
- revise site architecture to reflect final process flows

O Define detail
- devise a template system for unique screens and screen components in the architecture
- inventory the site and list the pages
- create screen details consisting of page level navigation, content types, and functional elements
- design the functional elements based on user tasks
- utilize standard notation in creating screen details
- develop a prototype for user testing with screen details
- ensure consistency of interaction behavior in prototypes
- identify interaction areas for further innovation
- define data format specifications
- revise site architecture and process flows based on screen details

P Evaluate & validate architecture
- determine the documentation format for recording user feedback from prototype testing
- test the interaction prototypes with users
- evaluate test results with team
- revise the interaction prototypes based on evaluation
- iterate through testing, feedback, evaluation, and revision as needed
- validate the final design solutions with team members

Q Complete architecture documentation
- revise site architecture documentation: detail screens, process flows, site map
- plan production schedule with other team members
- review process flows with appropriate team members
- revise the screen list and numbering system²
- revise the template system and screen components in the architecture
- review screen details and site map with team members
- collaborate on the review of screen details for nomenclature, logic, and adherence to rules of CMS
- validate package functionality/requirements
- develop data specifications at the page level
- collaborate on writing functional specifications
- ¼ deliver completed IA docs to project team and client

R Review GUI design
- collaborate on the interaction design: interpretation of navigation, screen functionality, layout
- review GUI design for adherence to IA docs
- assist in selecting key pages for client presentation
- ensure page designs meet browser technical standards
- collaborate on the high-fidelity prototype
- refine template system based on finalization of GUI
- revise the functional specifications
- lock scope
- ¼

S Review site build
- review the integrated build including:
  - navigation
  - content
  - assets
  - design
  - information architecture
  - functionality
  - system respones and performance
- make design adjustments
- participate in testing the build
- update functional specifications

T Issue resolution + quality control
- participate in QA testing
- make QA notes
- submit TARs
- make design adjustments
- update TAR
- update specifications
- retest new build

U Transfer knowledge to the back end
- incorporate feedback from server logs, client, and users
- resolve issues from gaps between design and implementation steps

Transfer knowledge to the client
- maintain integrity and functionality of the site

Transfer knowledge to the IA practice
- document project findings in a case study
- communicate feedback to IA practice and to other project teams

Deliverables

A Participate in client pitch
- ● client educational material

B Inform proposal
- ○ proposal

C Review proposal

D Establish project context & focus
- ◐ summary of findings

E Plan process + revise scope
- ● internal educational materials
- ◐ summary of findings
- ○ project plan that consists of: revised proposal (as needed), team process plan, project schedule
- ○ strategy document

F Conduct focused research
- ● current site map
- ● user experience audit
- ● current site audit
- ● competitive audit
- ○ package selection criteria

G Synthesize information
- ● user task models
- ● informational diagrams
- ● user audience models
- ● user profiles
- ● user scenarios
- ● secondary research findings
- ● executive interview findings
- ○ package evaluation document

H Define problem
- ● (high-level) feature list
- ○ definition document
- ○ scope matrix

I Develop concepts
- ● concept models
- ● user task models

J Evaluate concepts
- ● concept prototypes
- ● user testing findings

K Refine concepts
- ● revised concept(s)

L Choose concept
- ● feature list
- ● concept document

M Create site structure
- ● site map
- ○ content matrix

N Model processes & activities
- ● process flows

O Define detail
- ● screen details
- ● interaction prototypes (low or mid-fidelity)
- ● screen template system
- ● screen list
- ◐ data specifications

P Evaluate & validate architecture
- ● user testing findings

Q Complete architecture documentation
- ● functional specifications
- ● site map
- ● screen details
- ● screen list
- ● screen template system
- ● process flows
- ◐ data specifications
- ○ content matrix

R Review GUI design
- ◐ high-fidelity prototype

S Review site build
- ◐ update functional specifications

T Issue resolution + quality control
- ● TARs
- ◐ update functional specifications

U Transfer knowledge to the back end
- ○ operation report

Transfer knowledge to the client
- ● IA training materials
- ● planning and facilitation workshops
- ◐ style guide

Knowledge transfer to the IA practice
- ● case studies

Key

- ● deliverables owned by IA
- ◐ deliverables partly owned by IA
- ○ deliverables that IA has input to or consents to

✔ **team process plan** review and update team process plan before beginning each new project phase

◆ project milestones + client sign-off points

Practice and discipline abbreviations:

- BS digital business strategy
- B brand strategy
- CS content strategy
- GD graphic design
- IA information architecture
- EL integrated engagement leadership
- SD site development
- T technology
- X XMod

Information Architecture Collaborations with Technology

user-centered design · business strategy · technology · scope

Phases: Discover | Define | Concept | Design | Implement

| 1 Pre-project | 2 Understand the context & scope | 3 Synthesize the variables Ł / Define the problem and opportunities | 4 Explore possibilities | 5 Architect and iterate the solution | 6 Validate and test the design | 7 Transfer knowledge |

Process path

IA pre-project entry point → A Participate in client pitch → B Inform proposal

IA project entry point → C Review proposal → D Establish project context & focus → E Plan process revise scope

✓ team process plan → F Conduct focused research → G Synthesize info. → H Define problem

✓ team process plan → K Refine concepts → I Develop concepts → J Evaluate concepts → L Choose concept

✓ team process plan → M Create site structure → N Model processes/activities → O Define detail → P Evaluate, + validate architecture → Q Complete architecture docs. → R Review GUI design

S Review site build → T Issue resolution

U Transfer knowledge

Milestones: project plan · definition document · final concept · site map · process flows · screen details · IA docs to project team · GUI + HTML · site goes live

Process activities

(A) Participate in client pitch
- participate in knowledge Ł transfer from client
- educate client about creative roles

(B) Inform proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, resources, and schedule

(C) Review proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, Ł and schedule

(D) Establish project context & focus
- determine client drivers for the project
- understand client expectations for deliverables
- clarify project objectives and vision
- determine the critical success factors
- identify risks
- participate in knowledge transfer from client for:
  - client organizational structure
  - industry context
  - competitors
  - stakeholders
  - business requirements
  - market research + other information on user audiences
  - client strengths and weaknesses
  - constraints and opportunities
  - requirements for the end product/solution
  - technology capabilities (T)
  - project historical context: with Sapient and/or others
- conduct a user experience analysis of client Web site
- summarize the findings
- identify information gaps in knowledge transfer and what's needed to fill the gaps

(E) Plan process + revise scope
- develop a team process plan
- review team roles and responsibilities
- revise project schedule
- revise proposal (as needed)

(F) Conduct focused research
- define criteria for evaluating the research and the metrics for measuring it
- identify the appropriate formats for capturing research

business
- understand industry context
- determine the business drivers
- define best practices
- analyze the current state of client's business model, products, and services
- conduct a competitive audit

users
- identify the user audiences
- participate in primary and secondary research on audiences and user needs

technology
- develop package selection criteria based on the research findings

(G) Synthesize information
- distill research into findings and visual information models
- identify patterns in the findings and models
- identify initial areas of opportunity based on the research findings and models
- validate findings with client and users
- evaluate potential packages

(H) Define problem
- define the business problem
- validate the problem against project objectives, vision, and opportunities
- perform an initial reconciliation between business viability, user needs, and Ł technology capabilities
- identify a (high-level) set of features and reconcile with project scope (T X BS B)
- recommend potential solutions
- propose a strategy for moving forward

(I) Develop concepts (T X BS GD CS B)
- continue reconciliation of business viability, user needs, and technology capabilities
- brainstorm concepts
- participate in developing a plan for user research
- participate in user field research
- develop user scenarios
- sketch potential concepts + associated features
- create concept and organizational models
- collaborate in creating the plan for user testing

(J) Evaluate concepts
- create concept prototypes
- test concepts and/or concept prototypes with users
- analyse test findings with team
- make recommendations to client

(K) Refine concepts
- incorporate feedback and evaluations from testing into revising the concepts
- iterate through testing, feedback, evaluation, and revision as needed.

(L) Choose concept
- select a concept(s)
- document concept(s)
- present concept(s)
- revalidate the scope matrix

(M) Create site structure
- interpret concept into a high-level site architecture
- group content into primary sections for the site
- explore navigational models and relationships among content, functionality, and the sections of the site
- develop initial nomenclature for site sections
- define the page types and develop a numbering system
- review the types of content and the content hierarchy
- organize and group existing content
- identify functionality that needs technical exploration (T)

(N) Model processes & activities
- define interactions between and within the site sections
- model user tasks and data inputs/outputs to the system
- identify the functional elements that are similar or repeating in different areas of the site and make consistent
- identify data feeds, interactions with outside systems
- validate process flows with appropriate team members
- identify the areas for instructional copy
- identify complex areas, new interaction models for testing
- collaborate in creating the plan for user testing
- revise site architecture to reflect final process flows

(O) Define detail
- devise a template system for unique screens and screen components in the architecture
- inventory the site and list the pages
- create screen details consisting of page level navigation, content types, and functional elements
- design the functional elements based on user tasks
- utilize standard notation in creating screen details
- develop a prototype for user testing with screen details
- ensure consistency of interaction behavior in prototypes
- identify interaction areas for further innovation
- define data format specifications
- revise site architecture and process flows based on screen details

(P) Evaluate & validate architecture
- determine the documentation format for recording user feedback from prototype testing
- test the interaction prototypes with users
- evaluate test results with team
- revise the interaction prototypes based on evaluation
- iterate through testing, feedback, evaluation, and revision as needed
- validate the final design solutions with team members

(Q) Complete architecture documentation
- revise site architecture documentation: detail screens, process flows, site map
- plan production schedule with other team members
- review process flows with appropriate team members
- revise the screen list and numbering system[2]
- revise the template system and screen components in the architecture
- review screen details and site map with team members
- collaborate on the review of screen details for nomenclature, logic, and adherence to rules of CMS
- validate package functionality/requirements
- develop data specifications at the page level
- collaborate on writing functional specifications
- deliver completed IA docs to project team and client (T GD CS X B SD)

(R) Review GUI design
- collaborate on the interaction design: interpretation of navigation, screen functionality, layout
- review GUI design for adherence to IA docs
- assist in selecting key pages for client presentation
- ensure page designs meet browser technical standards
- collaborate on the high-fidelity prototype
- refine template system based on finalization of GUI
- revise the functional specifications (T)
- lock scope ¼

(S) Review site build
- review the integrated build including: (T SD)
  - navigation
  - content
  - assets
  - design
  - information architecture
  - functionality
  - system response and performance
- make design adjustments
- participate in testing the build
- update functional specifications

(T) Issue resolution + quality control (T SD)
- participate in QA testing
- make QA notes
- submit TARs
- make design adjustments
- update TAR
- update specifications
- retest new build

(U) Transfer knowledge to the back end (T)
- incorporate feedback from server logs, client, and users
- resolve issues from gaps between design and implementation steps

Transfer knowledge to the client
- maintain integrity and functionality of the site

Transfer knowledge to the IA practice
- document project findings in a case study
- communicate feedback to IA practice and to other project teams

Deliverables

(A) Participate in client pitch
- client educational material

(B) Inform proposal
- proposal

(C) Review proposal

(D) Establish project context & focus
- summary of findings

(E) Plan process + revise scope
- internal educational materials
- summary of findings
- project plan that consists of:
  - revised proposal (as needed)
  - team process plan
  - project schedule
- strategy document

(F) Conduct focused research
- current site map
- user experience audit
- current site audit
- competitive audit
- package selection criteria

(G) Synthesize information
- user task models
- informational diagrams
- user audience models
- user profiles
- user scenarios
- secondary research findings
- executive interview findings
- package evaluation document

(H) Define problem
- (high-level) feature list
- definition document
- scope matrix

(I) Develop concepts
- concept models
- user task models
- concept scenarios

(J) Evaluate concepts
- concept prototypes
- user testing findings

(K) Refine concepts
- revised concept(s)

(L) Choose concept
- feature list
- concept document

(M) Create site structure
- site map
- content matrix

(N) Model processes & activities
- process flows

(O) Define detail
- screen details
- interaction prototypes (low or mid-fidelity)
- screen template system
- screen list
- data specifications

(P) Evaluate & validate architecture
- user testing findings

(Q) Complete architecture documentation
- functional specifications
- site map
- screen details
- screen list
- screen template system
- process flows
- data specifications
- content matrix

(R) Review GUI design
- high-fidelity prototype

(S) Review site build
- update functional specifications

(T) Issue resolution + quality control
- TARs
- update functional specifications

(U) Transfer knowledge to the back end
- operation report

Transfer knowledge to the client
- IA training materials
- planning and facilitation workshops
- style guide

Knowledge transfer to the IA practice
- case studies

Key
- ● deliverables owned by IA
- ◐ deliverables partly owned by IA
- ○ deliverables that IA has input to or consents to
- ✓ team process plan — review and update team process plan before beginning each new project phase
- ◆ project milestones + client sign-off points

Practice and discipline abbreviations:
- BS digital business strategy
- B brand strategy
- CS content strategy
- GD graphic design
- EL integrated engagement leadership
- SD site development
- T technology
- X XMod

Information Architecture Collaborations with Scope

Center: user-centered design · business strategy · technology — scope

Phases: Discover | Define | Concept | Design | Implement

Columns

1 Pre-project · **2 Understand the context & scope** · **3 Synthesize the variables Ł / Define the problem and opportunities** · **4 Explore possibilities** · **5 Architect and iterate the solution** · **6 Validate and test the design** · **7 Transfer knowledge**

Process path

IA pre-project entry point → **A** Participate in client pitch → **B** Inform proposal

IA project entry point → **C** Review proposal → **D** Establish project context & focus → **E** Plan process revise scope → **F** Conduct focused research → **G** Synthesize info. → **H** Define problem → **I** Develop concepts → **J** Evaluate concepts → **K** Refine concepts → **L** Choose concept → **M** Create site structure → **N** Model processes/activities → **O** Define detail → **P** Evaluate + validate architecture → **Q** Complete architecture docs. → **R** Review GUI design → **S** Review site build → **T** Issue resolution → **U** Transfer knowledge

Milestones: project plan · definition document · final concept · site map · process flows · screen details · IA docs to project team · GUI + HTML · site goes live

Process activities

A Participate in client pitch
- participate in knowledge transfer from client
- educate client about creative roles

B Inform proposal
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, Ł and schedule

C Review proposal [EL BS B X GD CS T]
- evaluate the opportunity
- assess the level and type of project engagement
- assess the project scope, required activities, Ł and schedule

D Establish project context & focus
- determine client drivers for the project
- understand client expectations for deliverables
- clarify project objectives and vision
- determine the critical success factors
- identify risks
- participate in knowledge transfer from client for:
  client organizational structure
  industry context
  competitors
  stakeholders
  business requirements
  market research + other information on user audiences
  client strengths and weaknesses
  constraints and opportunities
  requirements for the end product/solution
  technology capabilities
  project historical context: with Sapient and/or others
- conduct a user experience analysis of client Web site
- summarize the findings
- identify information gaps in knowledge transfer and what's needed to fill the gaps

[EL BS B X GD CS T]

E Plan process + revise scope
- develop a team process plan
- review team roles and responsibilities
- revise project schedule
- revise proposal (as needed)

[EL BS B X GD CS T]

F Conduct focused research
- define criteria for evaluating the research and the metrics for measuring it
- identify the appropriate formats for capturing research

business
- understand industry context
- determine the business drivers
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- identify the user audiences
- participate in primary and secondary research on audiences and user needs

technology
- develop package selection criteria based on the research findings

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- define the business problem
- validate the problem against project objectives, vision, and opportunities
- perform an initial reconciliation between business viability, user needs, and Ł technology capabilities
- identify a (high-level) set of features and reconcile with project scope
- recommend potential solutions
- propose a strategy for moving forward

[EL BS B X GD CS T]

I Develop concepts
- continue reconciliation of business viability, user needs, and technology capabilities
- brainstorm concepts
- participate in developing a plan for user research
- participate in user field research
- develop user scenarios
- sketch potential concepts + associated features
- create concept and organizational models
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- create concept prototypes
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- analyse test findings with team
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- incorporate feedback and evaluations from testing into revising the concepts
- iterate through testing, feedback, evaluation, and revision as needed.

L Choose concept
- select a concept(s)
- document concept(s)
- present concept(s)
- revalidate the scope matrix

[EL B GD CS T]

M Create site structure
- interpret concept into a high-level site architecture
- group content into primary sections for the site
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- develop initial nomenclature for site sections
- define the page types and develop a numbering system
- review the types of content and the content hierarchy
- organize and group existing content
- identify functionality that needs technical exploration

N Model processes & activities
- define interactions between and within the site sections
- model user tasks and data inputs/outputs to the system
- identify the functional elements that are similar or repeating in different areas of the site and make consistent
- identify data feeds, interactions with outside systems
- validate process flows with appropriate team members
- identify the areas for instructional copy
- identify complex areas, new interaction models for testing
- collaborate in creating the plan for user testing
- revise site architecture to reflect final process flows

O Define detail
- devise a template system for unique screens and screen components in the architecture
- inventory the site and list the pages
- create screen details consisting of page level navigation, content types, and functional elements
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P Evaluate & validate architecture
- determine the documentation format for recording user feedback from prototype testing
- test the interaction prototypes with users
- evaluate test results with team
- revise the interaction prototypes based on evaluation
- iterate through testing, feedback, evaluation, and revision as needed
- validate the final design solutions with team members

[EL GD CS T SD]

Q Complete architecture documentation + quality control
- revise site architecture documentation: detail screens, process flows, site map
- plan production schedule with other team members
- review process flows with appropriate team members
- revise the screen list and numbering system²
- revise the template system and screen components in the architecture
- review screen details and site map with team members
- collaborate on the review of screen details for nomenclature, logic, and adherence to rules of CMS
- validate package functionality/requirements
- develop data specifications at the page level
- collaborate on writing functional specifications
- deliver completed IA docs to project team and client

¼ [EL GD CS T SD]

R Review GUI design
- collaborate on the interaction design: interpretation of navigation, screen functionality, layout
- review GUI design for adherence to IA docs
- assist in selecting key pages for client presentation
- ensure page designs meet browser technical standards
- collaborate on the high-fidelity prototype
- refine template system based on finalization of GUI
- revise the functional specifications
- lock scope

¼ [EL GD CS T SD]

S Review site build
- review the integrated build including: navigation, content, assets, design, information architecture functionality, system responses and performance
- make design adjustments
- participate in testing the build
- update functional specifications

T Issue resolution + quality control
- participate in QA testing
- make QA notes
- submit TARs
- make design adjustments
- update TAR
- update specifications
- retest new build

[EL T SD]

U Transfer knowledge to the back end
- incorporate feedback from server logs, client, and users
- resolve issues from gaps between design and implementation steps

Transfer knowledge to the client
- maintain integrity and functionality of the site

Transfer knowledge to the IA practice
- document project findings in a case study
- communicate feedback to IA practice and to other project teams

[EL T]

Deliverables

A Participate in client pitch
- ● client educational material

B Inform proposal
- ○ proposal

C Review proposal

D Establish project context & focus
- ● summary of findings

E Plan process + revise scope
- ● internal educational materials
- ● summary of findings
- ◐ project plan that consists of: revised proposal (as needed) · team process plan · project schedule
- ○ strategy document

F Conduct focused research
- ● current site map
- ● user experience audit
- ● current site audit
- ● competitive audit
- ○ package selection criteria

G Synthesize information
- ● user task models
- ● informational diagrams
- ● user audience models
- ● user profiles
- ● user scenarios
- ● secondary research findings
- ● executive interview findings
- ○ package evaluation document

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- ● concept models
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- ● concept prototypes
- ○ user testing findings

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- ○ revised concept(s)

L Choose concept
- ● feature list
- ○ concept document

M Create site structure
- ● site map
- ○ content matrix

N Model processes & activities
- ● process flows

O Define detail
- ● screen details
- ● interaction prototypes (low or mid-fidelity)
- ● screen template system
- ● screen list
- ○ data specifications

P Evaluate & validate architecture
- ○ user testing findings

Q Complete architecture documentation + quality control
- ● functional specifications
- ● site map
- ● screen details
- ● screen list
- ● screen template system
- ● process flows
- ● data specifications
- ○ content matrix

R Review GUI design
- ○ high-fidelity prototype

S Review site build
- ○ update functional specifications

T Issue resolution + quality control
- ● TARs
- ○ update functional specifications

U Transfer knowledge to the back end
- ○ operation report

Transfer knowledge to the client
- ● IA training materials
- ● planning and facilitation workshops
- ● style guide

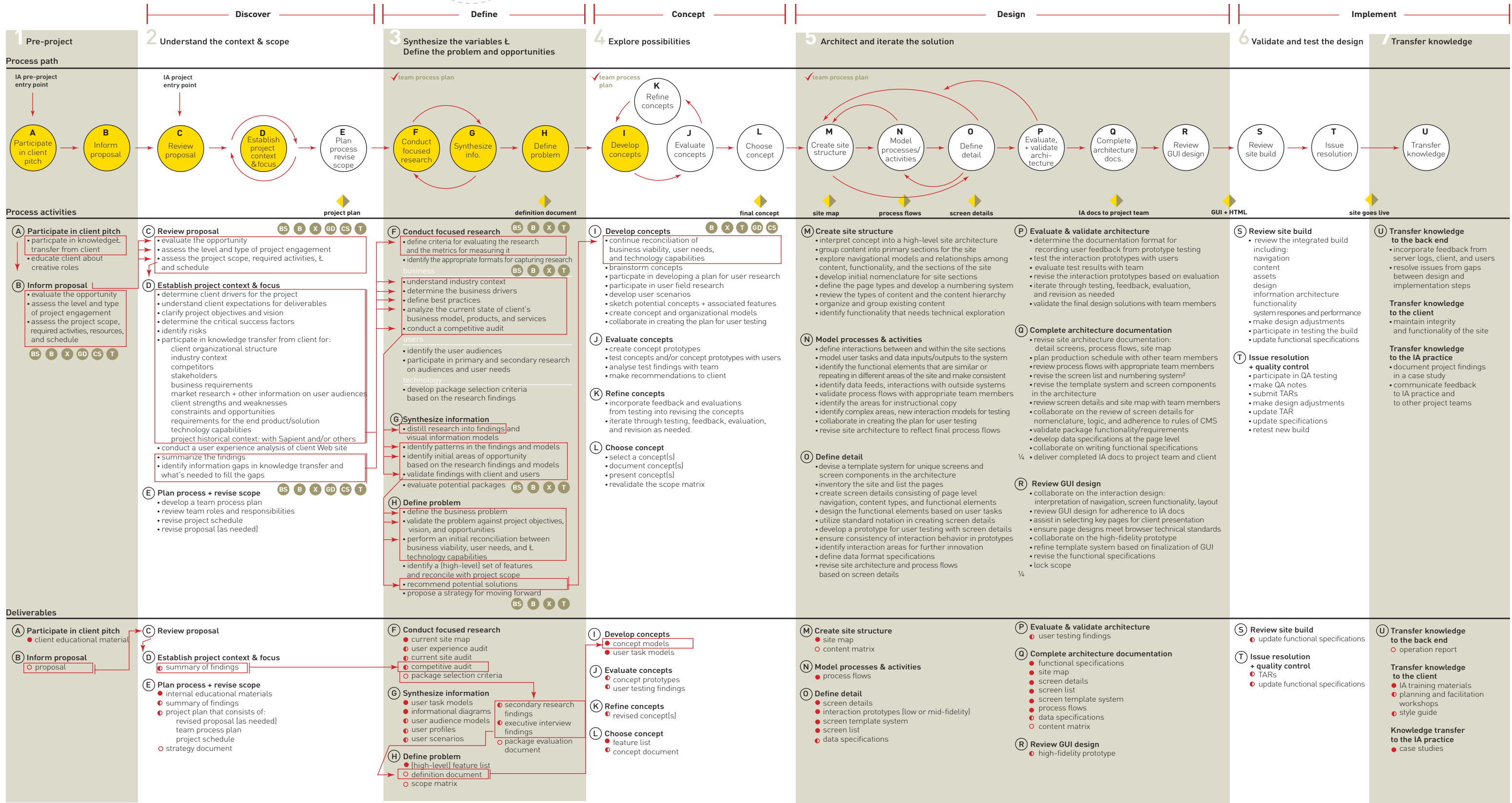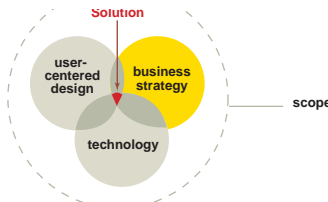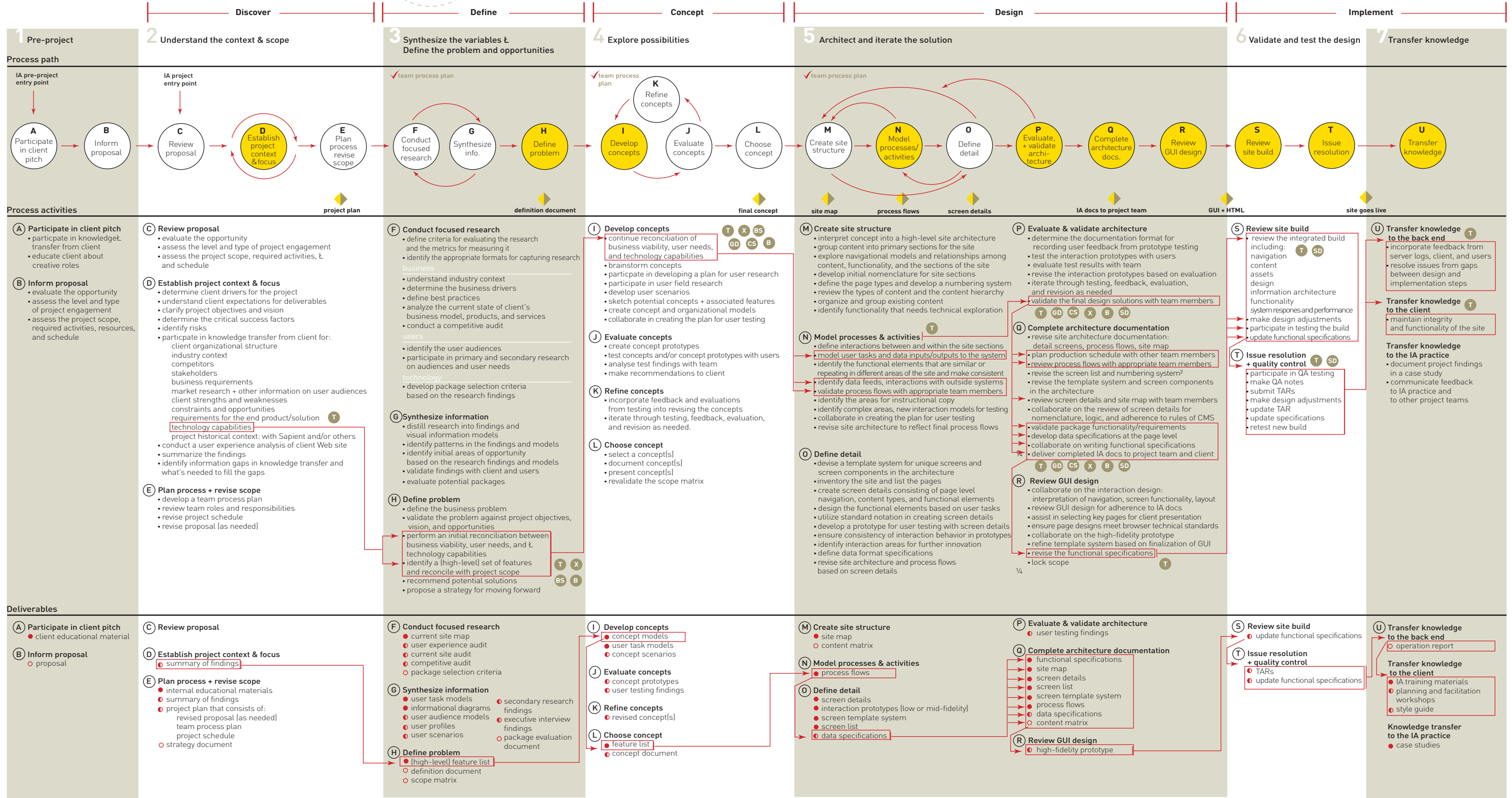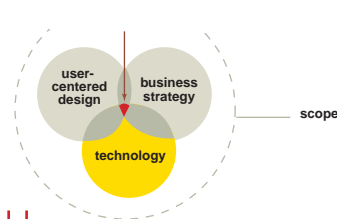**Knowledge transfer to the IA practice**
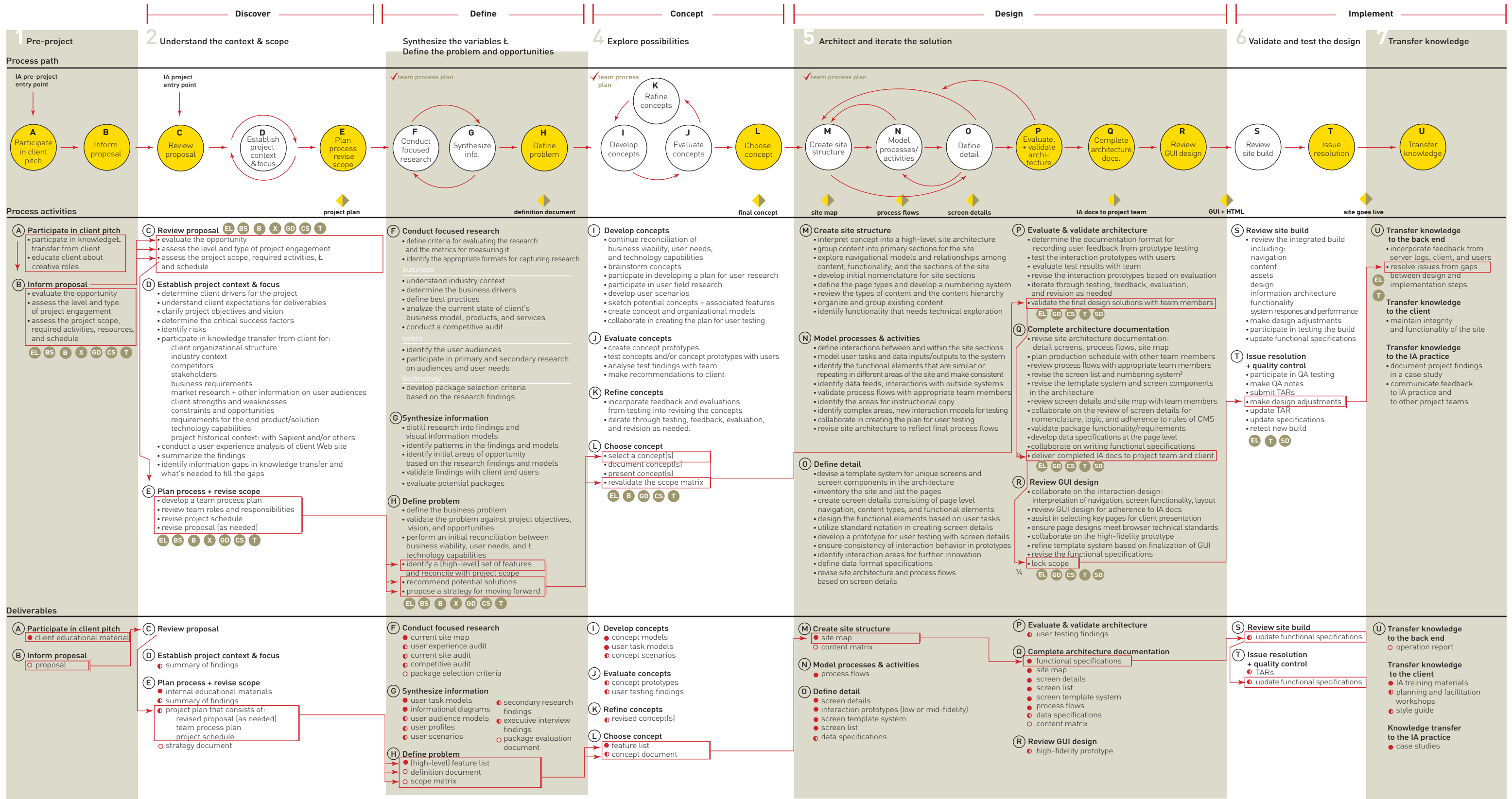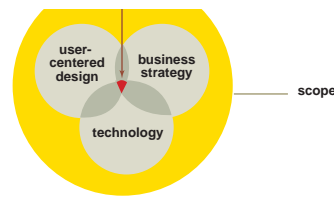- ● case studies

Key
- ● deliverables owned by IA
- ◐ deliverables partly owned by IA
- ○ deliverables that IA has input to or consents to
- ✓ team process plan — review and update team process plan before beginning each new project phase
- ◆ project milestones + client sign-off points

Practice and discipline abbreviations:
- BS digital business strategy
- B brand strategy
- CS content strategy
- GD graphic design
- EL integrated engagement leadership
- SD site development
- T technology
- X XMod

Background: How the process framework was created

This document conveys a standardized process framework for delivering Information Architecture work at Sapient. This process framework will provide a foundation for the ongoing efforts and growth of the IA practice, including training, new hire orientation, and process evolution.

This section describes the process used to document and create a common Sapient Information Architecture process framework. From the beginning, the IA process team has strove for a process that is collaborative and inclusive. The resulting product is a strong reflection of the unification of diverse thinking and community building to become one practice with a common process.

History
In August, 1999, Ken Hurley, co-leader of the Information Architecture practice at the time, called for the documentation of the IA process to help facilitate the training and rollout of a common IA process across the company. An IA process subcommittee was commissioned and chaired by Darian Hendricks from the Cambridge office. The initial subcommittee was comprised of representation from each of the legacy companies, Adjacency, Studio Archetype, and Sapient.

Summit I
The subcommittee gathered in Sapient's Manhattan office for a two-day summit to present each legacy organization's process with a focus on what Information Architects did. The first day of the summit consisted of two-hour presentations by each organization, capturing issues that arose, identifying tasks performed by Information Architects, identifying overlaps or intersections with other disciplines, and identifying types of deliverables. On the second day, the group created a process framework, in the form of a Gantt chart, broken into three areas—things we do, things we work on, and things we review. The group identified common deliverables and agreed on common terminology for the deliverables. These deliverables were mapped to the process framework.

After the Summit, the group had a checkpoint with some of the Information Architects across the company to solicit feedback before moving forward.

After several discussions and with the guidance of Lillian Svec, IA Practice Lead, it was decided to open the process to all IA Directors across the company and look at both legacy organizations and legacy offices where IA had leadership. This would provide the opportunity to benefit from the broadest cross-section of IA experience in the company. At the time, the offices with IA representation included Atlanta, Cambridge, New York, San Francisco, and Sydney. To make greater progress and incorporating lessons from the first summit, the subcommittee spent two months preparing for a second summit.

Pre-Summit II

To facilitate knowledge sharing and information gathering, each legacy office was required to prepare a formal documented presentation of the following:

- Background on the office and its evolution
- Background on the Information Architects in the office
- The office's definition of Information Architecture
- Role of Information Architects in the office
- The office's vision of the future of Information Architecture
- The office's methodology and process to Information Architecture
- List of deliverables with representative samples
    - Deliverable definition
    - Needs it satisfies
    - Attributes/contents
    - Typical tools used
    - Process/steps in creating
    - Doneness criteria
    - Strengths
    - Weaknesses
    - Representative samples classified by project type, industry, tool used, and additional notes
- Any other supplementary information that may be unique to the office

The information was collected by three primary techniques: (1) a single survey of all Information Architects in the company that was consolidated by each legacy office lead; (2) a debrief meeting with Information Architects in the office; and (3) a collection and consolidation of representative work.

The resulting document from each office served a dual purpose: (1) a rich source of information for new hires, and (2) facilitated the additional work that needed to happen after the second summit. Each office had a copy of each office's presentation to take back to its respective office.

Summit II

During December 13-16, 1999, the IA practice held a second summit in the Sapient San Francisco office at 101 California Street. It was attended by all IA Directors in the company at the time. The attendance included the following individuals:

Name	Office Location		Company background
Alder Yarrow	San Francisco		Adjacency
David Garner	Atlanta		Studio Archetype
Darian Hendricks	Cambridge		Legacy Sapient
Isabel Ancona	New York		Studio Archetype
Jen Wolf	San Francisco		Adjacency
Joanne Mendel	San Francisco		Studio Archetype
Lillian Svec	**San Francisco**	SF practice lead	Clement Mok Designs
Mark Stockwell	San Francisco		New Sapient
Miwa Wang	San Francisco		Studio Archetype
Page Ikeda	Atlanta		Studio Archetype
Rob Manson-Pollard	Sydney		New Sapient
Shuli Goodman	San Francisco		New Sapient
Steve McGrew	San Francisco		Studio Archetype

The goals of the summit were as follows:
- Review and share what has been done to date
- Define our guiding principles and a consolidated IA definition
- Define the IA process and deliverables for the practice
- Define a framework / standards document for the IA practice
- Reach consensus on the outcomes of the IA process
- Identify next steps we will take to develop the IA practice
- Update the attendees on the IA training teams progress
- Understand current state of hiring / recruiting across the practice
- Update group on practice leadership from Creative Leadership Team
- Provide intro to the new X-Mod discipline
- Build a strong IA leadership community

The following outline provides a high-level flow of the process steps followed during the summit:

1. Development of the IA practice definition and guiding principles
- Each office wrote its high-level IA practice definitions and guiding principles in its office presentation on the whiteboards
- Each of the offices presented its detailed definitions of the IA practice (approximately 2 hours each)
- The group identified similar themes and elements from each office definition that was to be addressed in the final definition
- The same exercise was done for guiding principles
- A subcommittee was created to take these summaries and create a high-level, mid-level, and low-level definition of the practice with supporting guiding principles

2. Gaining context and sharing information
- An outline of the Sapient DDCDI process was drawn on a whiteboard as a reference point
- Each office was given two hours to present its document
- Presentations focused on office philosophy around the IA practice, process followed, and types of deliverables created
- One spokesperson for an office spoke while others followed through a copy of the document
- Using different colored post-its for each office, someone in the group captured the name of each new deliverable identified and placed it on the DDCDI whiteboard as per the respective office's process
- Questions were limited to clarification and understanding
- Issues, clarification of terminology, topics for future conversations, and next steps were captured on whiteboards during each presentation

3. Creating a process framework
- After each office presentation that laid the foundation for common understanding and context, the group began to outline a process framework that took into consideration the commonalties and best practices from each office
- **First**, on one whiteboard, each of the offices added its key deliverables to the DDCDI process outline using post-it notes
- The group arranged these key deliverables post-it notes into high-level tasks or deliverables by way of grouping post-it notes, drawing a circle around the post-its, and labeling the group
- **Second**, on a different whiteboard, the group developed a high-level list of tasks, irrespective of DDCDI, that the new IA process should include using post-it notes
- The group then arranged these high-level tasks into a rough path and set steps for developing, documenting, and maintaining an Information Architecture for a project
- The group then mapped the key deliverables from the first whiteboard onto the rough path that would form the basis for the new IA framework
- **Third**, on a different whiteboard, the group then created a definition of what an integrated IA framework was: an ordered progression of defined activities, each with explicit entry and exit criteria
- The group then defined the high-level stages contained within the new IA framework that was mapped on the second whiteboard
- The group then broke out into teams to define the entry and exit criteria for each of these stages
- The exit and entrance criteria were checkpointed against each stage

4. Reconciling information
- After revisiting the deliverables whiteboard, the group then mapped the refined list of key deliverables on to the rough IA framework
- The group then defined which of these key deliverables were owned, developed in collaboration with, or informed by the IA practice

5. Visualizing the process
- The first whiteboard with the DDCDI process outline and key deliverables list was then cleared
- The group mapped the high-level tasks into an idealized critical path for developing an Information Architecture for a project; looking at sequences, loops, and dependencies
- The group then broke out into subgroups to map the key activities onto the new IA critical path
- Then, the group broke out into subgroups again to map the key deliverables onto the new IA critical path

The four-day workshop was concluded by (1) identifying key next steps, (2) identifying the final communication vehicle for this process with a high-level table of contents, and (3)creating three subgroups to synthesize the information, go to greater detail, and reconcile the work of the summit. The subgroups were:

- IA practice definition and guiding principles - Page Ikeda, Chair
- IA process framework - Joanne Mendel, Chair
- Universal deliverable definitions and glossary - Isabel Ancona, Chair

Spanning a one and a half month time frame and weekly checkpoints with subcommittee chairs, each subcommittee created a plan and process for addressing the area. All work was reviewed in pieces by subcommittees and then by all IA Directors. A two-day, face-to-face checkpoint was scheduled in San Francisco to review all documents to date with key representatives from each committee. A subsequent plan was developed to consolidate the documents, create final document elements, and review final edits. The Content Strategy practice and Print Production team in San Francisco supported the team with final copy editing and print production.

This process supported the collaboration and consensus building that the IA process team was seeking. The process leveraged our strengths as a group and a divide-and-conquer mentality that permitted us to achieve a lot over a short period of time.

Darian C. Hendricks
Chair, IA Process Team

An Information Architecture glossary

Affinity mapping
A brainstorming activity used to visually identify high-level associations between elements, such as words, items, and data.

Build
A version of the near-completed site or product including defined versions of the constituent sub-systems. Builds are used for testing and evaluation of sub-system integration. The completed site or product is typically referred to as the "final build."

Component
A component is a discrete content element or piece of functionality. Combinations of multiple components can create a template.

Data model
A systematic approach to defining the types of data that is used or transferred. A data model can also determine requirements or rules for different data types.

Design patterns
Re-usable, customizable solutions to recurring design problems.

Discipline
Sapient is organized vertically by industries and horizontally by different groups of expertise, disciplines. The current disciplines represented at Sapient are Technology, Creative, Experience Modeling or X-Mod, Digital Business Strategy, and Integrated Engagement Leadership.

Entry criteria
The understanding and/or data one must have before beginning a new phase or step.

Exit criteria
The understanding and/or data one must have before ending a phase or to consider a phase closed.

Features, Requirements and Functionality
Terms that are often confused, features, requirements and functionality differ by the timing of development and the level of detail described. Features are often the first to be created by a team. An understanding of business, user, brand, and technology needs provide the team with the context to define features of a solution. Further understanding of users activities, business processes, and technology limitations determine specific requirements for features. Finally, specific functional elements must be defined to understand exactly how the feature will work.

> **Features**
> A general solution that meets a need or supports an activity. Example: a shopping cart feature will enable users to store items to be purchased on a site.

Requirements

Specific parameters that a feature must include to be successful. Example: The shopping cart must calculate the total including appropriate sales tax as well as appear on every screen.

Functionality

Elements of a site that enable users to interact and achieve tasks. Often contrasted with content as the two main elements in a site and can contain many parts that combined make a feature. Example: The shopping cart will have a "cart" view that allows users to see what all has been added as well as an "edit" view that allows user to remove items or change quantities.

Framework

A basic conceptual structure used for reference and interpretation.

Heuristic evaluation

From Neilsen, Jakob. Usability Engineering, 1993.

The systematic inspection of an interface or application for usability. The goal of heuristic evaluation is to find the usability problems in a design so they can be attended to and corrected as part of an iterative design process. Heuristic Evaluation involves having a small set of evaluators examine the design and judge its compliance with an established set of principles, or "heuristics." An example of a set of heuristics might include the following principles:

- Use simple and natural dialogue
- Speak the users language
- Minimize user memory load
- Design for consistency
- Provide feedback
- Create clearly marked exits
- Provide shortcuts
- Write good error messages
- Prevent errors
- Create help and documentation

Human computer interaction (HCI)

The study, planning and design of the interaction between computers and users.

Human factors & human factors engineering

Chapanis , Alphonse. "Human Factors Society Bulletin," November 1991

Human Factors is a body of knowledge about human limitations, human abilities, and other human characteristics that are relevant to design.

Human Factors Engineering is the application of human factors information to the design of tools, machines, systems, tasks, jobs, and environments for safe, comfortable, and effective human use.

Interaction model
An established approach by which users will employ a system. Interaction models marry the user's work with the systems supporting functionality. Interaction models can define or identify the main points of user

Model
A description or analogy used to help visualize something, like a task, that cannot be directly observed.

Object–oriented design patterns
Descriptions of communicating objects and classes that are customized to solve a general design problem in a particular context.

Paradigm
A philosophical and theoretical framework within which theories, laws, and generalizations and the experiments performed in support of them are formulated

Practice (sub-discipline)
The Creative discipline is made of six practices: Brand Strategy, Information Architecture, Content Strategy, Graphic Design, and Site Development. Additionally, there is a growing population of Directors of Creative Delivery in the discipline, whose purpose is to provide a two-way support link between the business units and the creative teams.

The five practices within the Creative discipline require distinct skill sets, yet are interdependent when applied to a project, just as the Creative discipline as a whole is interdependent with the other four disciplines throughout the life-span of a project. Each Creative practice has a discipline-wide Practice Lead to provide thought leadership by setting and maintaining the direction for the practice and provide guidance and mentorship for the people in that practice throughout the organization.

Prototype
A model of an intended concept or design limited in scope, functionality, or interactivity. Prototypes are built to evaluate or envision a completed concept or design while applying less effort than the full concept or design would require.

Scenario
A narrative description of the user experience. Similar to a use case, a scenario describes a hypothetical user's interaction with the front end in context of the user's goals, lifestyle, and/or environment. Scenarios are used to visualize the user experience prior to more concrete descriptions including page-level IA, screen details, or visual concepts.

Screen/Page
A single visual presentation of a user interface that when put together with other screens/pages form a Web site, application, or other interactive software. For example, on the Web a screen typically corresponds to a single HTML file or HTML frameset.

Template

A template identifies a unique configuration of elements for a screen and defines a set of rules or guidelines that can be applied to similar screens. There are several types of templates used within Sapient. Information Architects interact most with screen layout templates and visual design templates in the design phases of a project to identify areas of information or components on screens. Content management templates and implementation package templates are used in building the site and identify unique functional components.

UML

The Unified Modeling Language provides system architects working on object analysis and design with one consistent language for specifying, visualizing, constructing, and documenting the artifacts of software systems, as well as for business modeling. It simplifies the complex process of software design, making a "technical blueprint" for construction. For more information see: http://www.rational.com/uml/ or http://www.omg.org

UI design patterns

An application-independent, repeatable relationship of linked controls, common operations, and screens which can be applied to different types of business functionality.

Usability

ISO 9241-11 Guidelines on Usability, 1997

The extent to which a product can be used by specified users to achieve specific goals with effectiveness, efficiency, and satisfaction in a specified context of use. In other words, usability is the ease with which a user can learn and use a product or service.

Usability testing

A research methodology for evaluating the effectiveness of a system for interaction with users and identifying points of improvement. Users are the center-point of usability testing.

Use Case

The specification of a sequence of actions-including variations-that a system can perform interacting with users of the system.

User-centered design

A design methodology that centers on the concerns, values, and perceptions of users while working to meet the business goals of stakeholders. When successful, user-centered design creates an experience that is desirable, useful, and usable, while meeting primary business objectives.

Wireframes

Screen-level information architecture detailing the information design, navigation, and functionality for a given screen or template. Wireframes should be referred to as screen details.

Index of deliverables (in order of execution)

Index of deliverables (alphabetical)