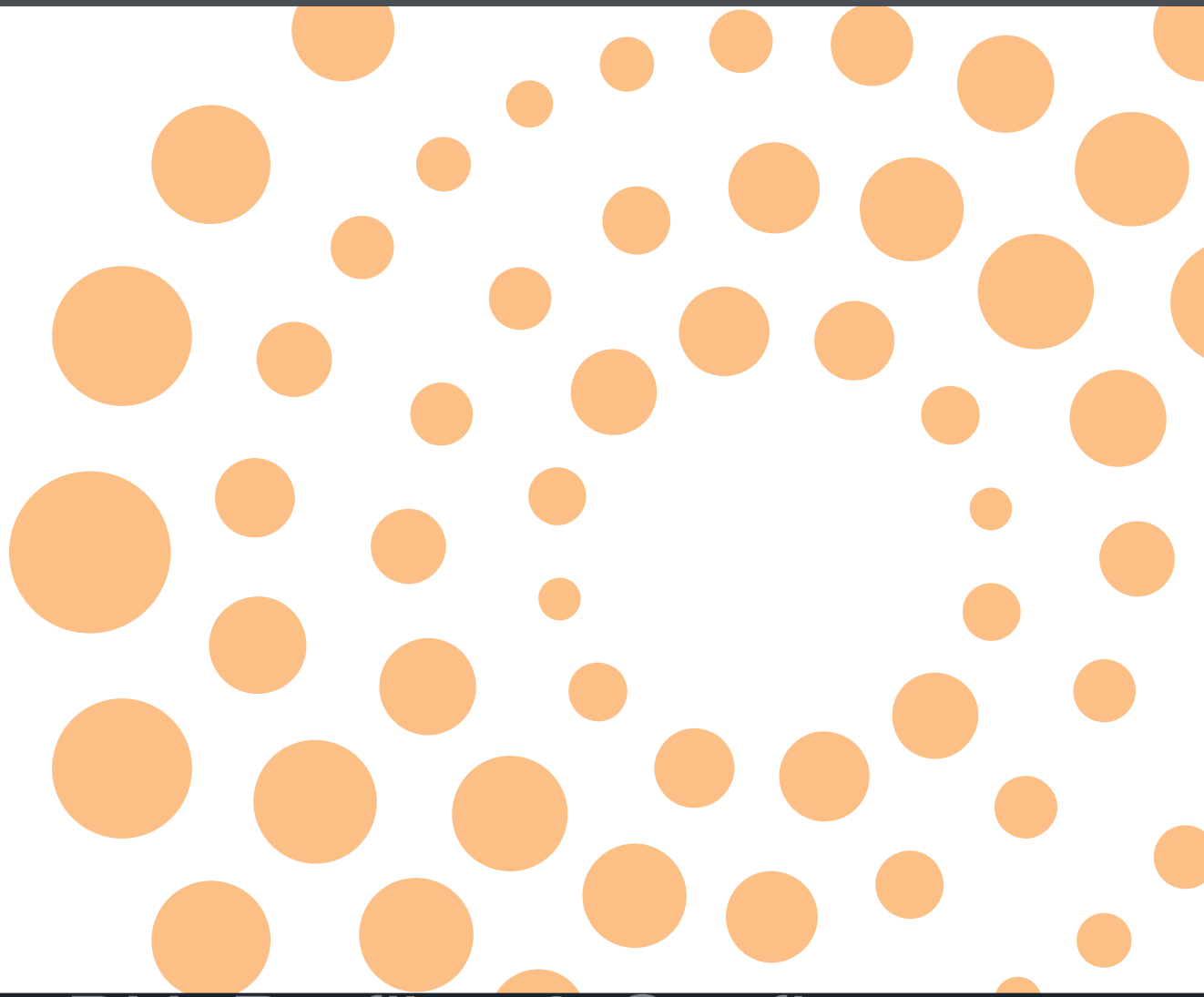
Affinity Diagramming



eBH: Profiles & Configurators

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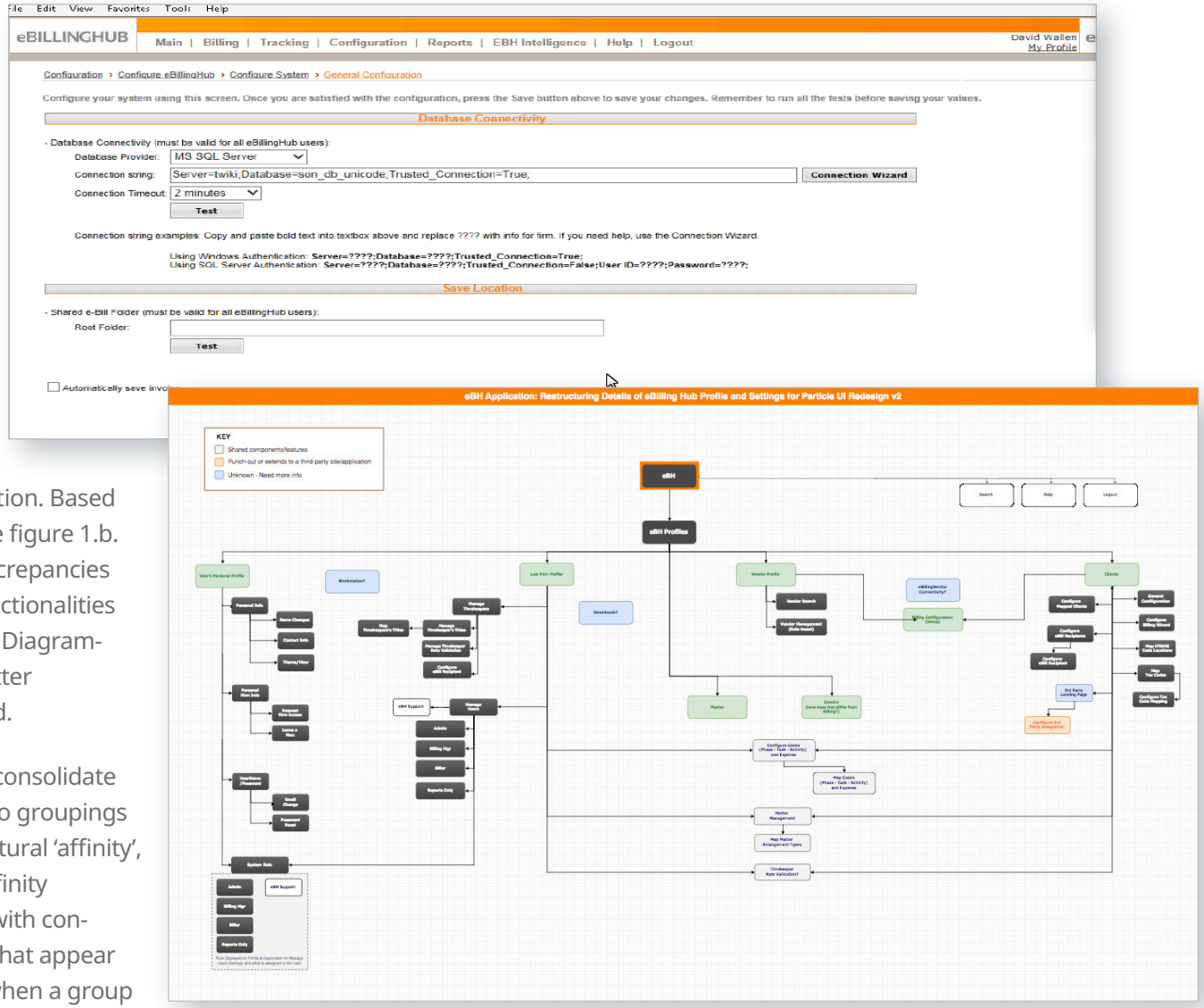
Introduction

The Goal

The goal of the Affinity Diagramming exercises was to gain clarification from the results of the cardsorting exercise that was completed previous to this report. The initial goal of the cardsort
exercise was to improve the labeling, grouping and organization of the Profile and Configuration features on the application. Based on the results of that exercise (see figure 1.b. to the right), there were some discrepancies where participants felt certain functionalities belonged withing categories. The Diagramming exercises was created to better understand why this had occurred.

Affinity Diagramming is a way to consolidate a large amount of information into groupings or clusters of ideas that have a natural 'affinity', or commonality among them. Affinity Diagrams are a great tool to use with confronted with many facts or ideas that appear to be chaotic in organization, or when a group consensus is needed.



Site map created based on the results of the Card sorting exercise.

Objectives

Our Goals

The goals of both the card sorting exercise and Affinity Diagramming exercises was to improve the grouping, organization and the labeling of the Profiles and Configurator (System Settings) information within the application.

The Affinity Diagramming exercises were performed over a period of a week and half. During this time, 4 moderated workshops were conducted with the following teams that had completed the cardsorting exercise previous to these workshops:

- Support
- Implementation
- Professional Services Product Management Team (PSPMs)

resolve
organization of content
discrepancies

Methodology

What We Did

The exercises included both on-site and online participants. The first exercise delivered to the participants the original 33 cards displayed on a white-board, which was transferred to a online white-board for the remote participants.

To save time, as Support had limited time to offer, the original cards were delivered in grouping that were the results of the cardsort and were reviewed. The content was then reorganized based on conversations and individuals moving content around. As the workshops progressed, some cards/content was deleted while some names/labeling was changed.

The “fifth” workshop was conducted with a small group who had expressed some User insights or who have extensive User on-boarding/training experience.

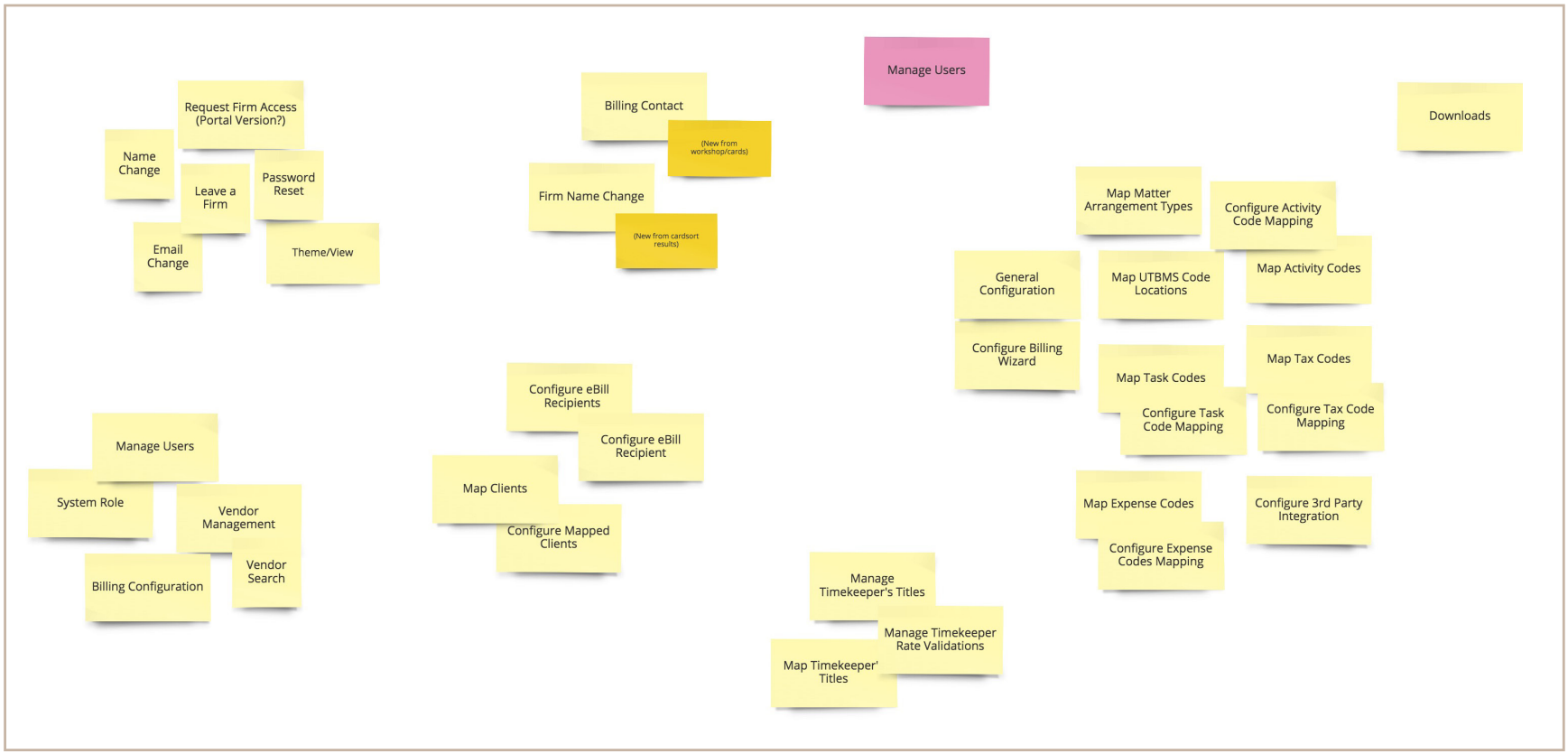
The results of each workshop are displayed on the following pages.

18 participants
33 items of content
group consensus of 5 groupings

Methodology *(cont.)*

Workshop #1

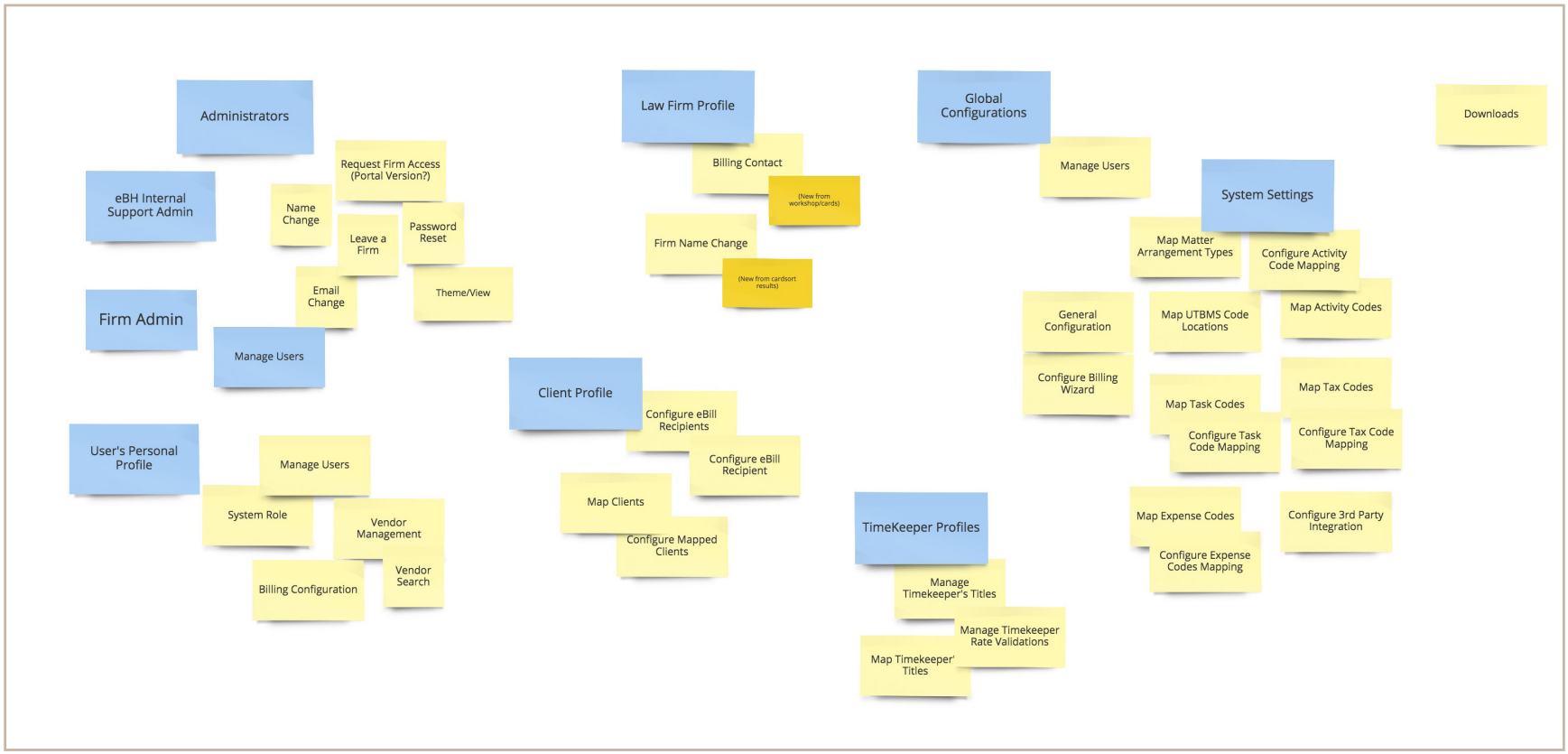
Workshops began with the initial results of the cardsorting exercise:



Results

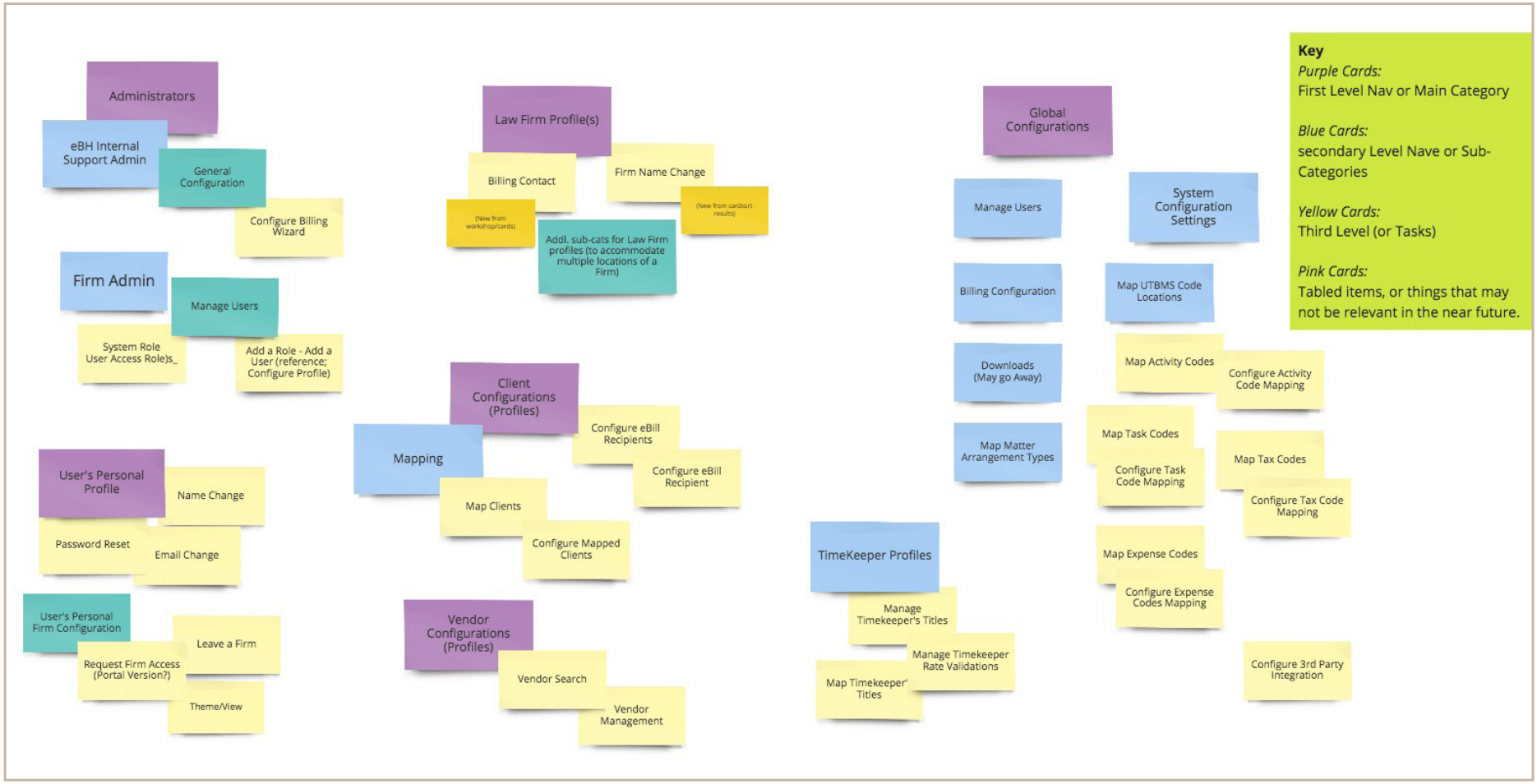
Workshop #1

The results of the first workshop where participants began to break down the initial cardsort results.



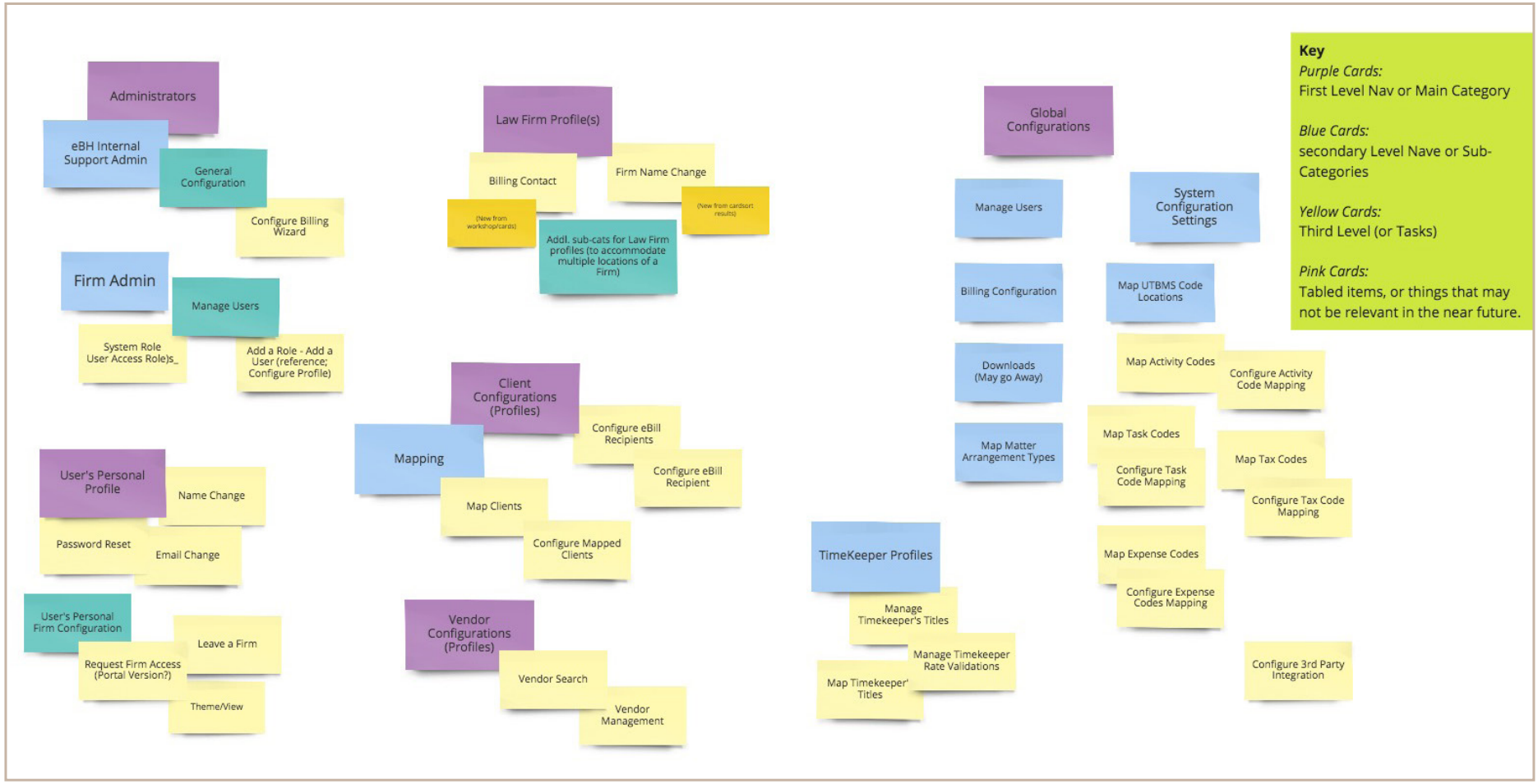
Results *(cont.)*

Workshop #2



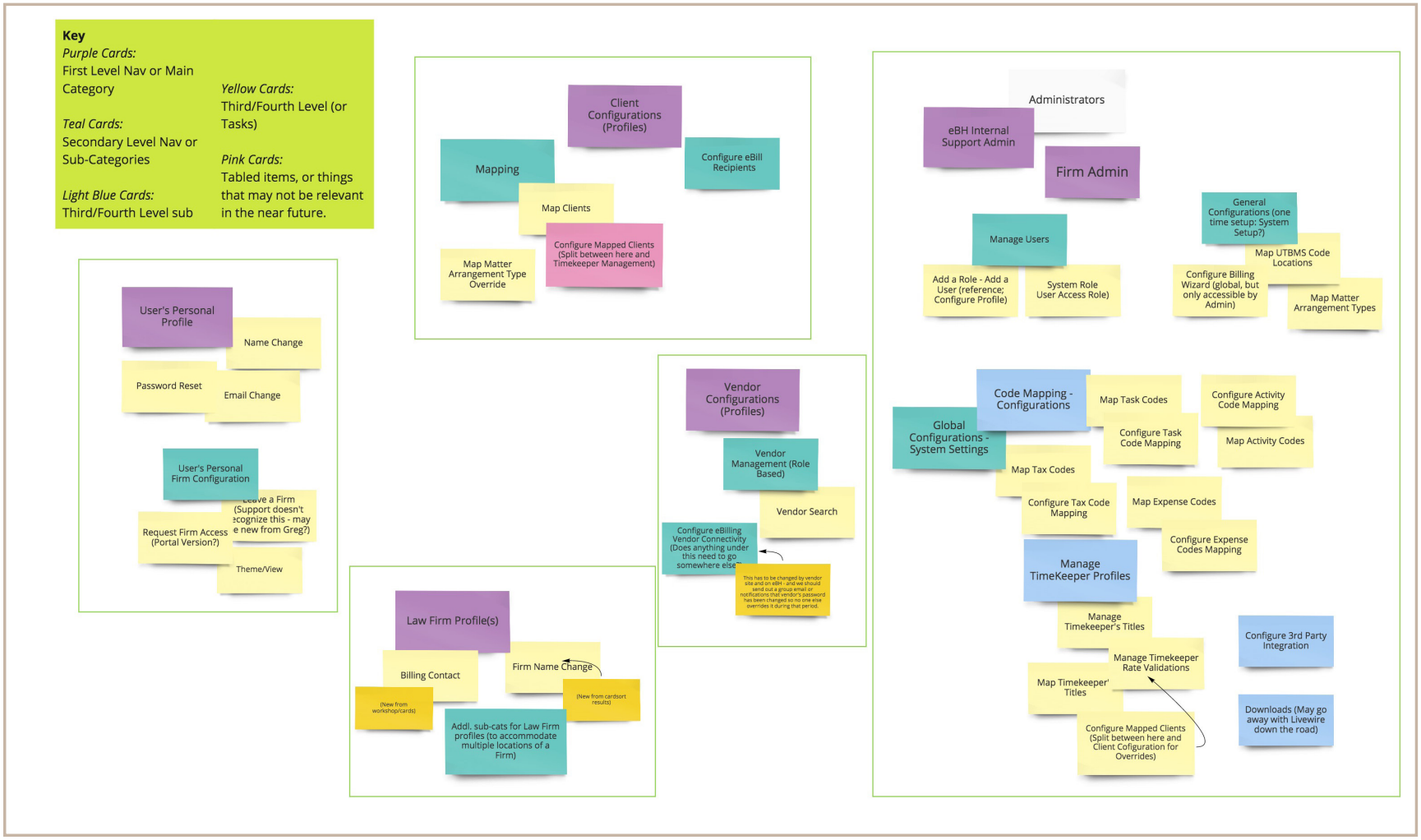
Results *(cont.)*

Workshop #3



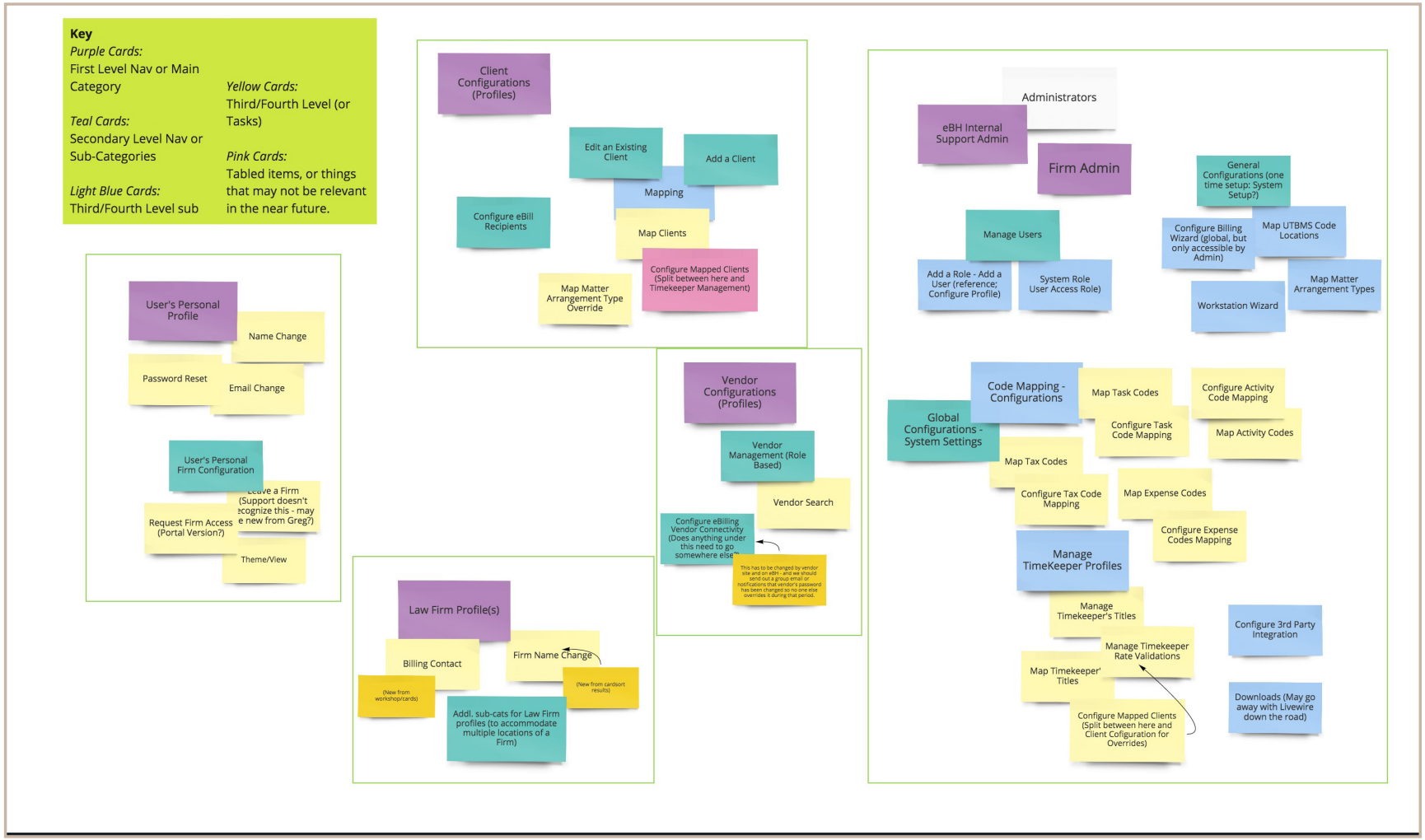
Results *(cont.)*

Workshop #4



Results *(cont.)*

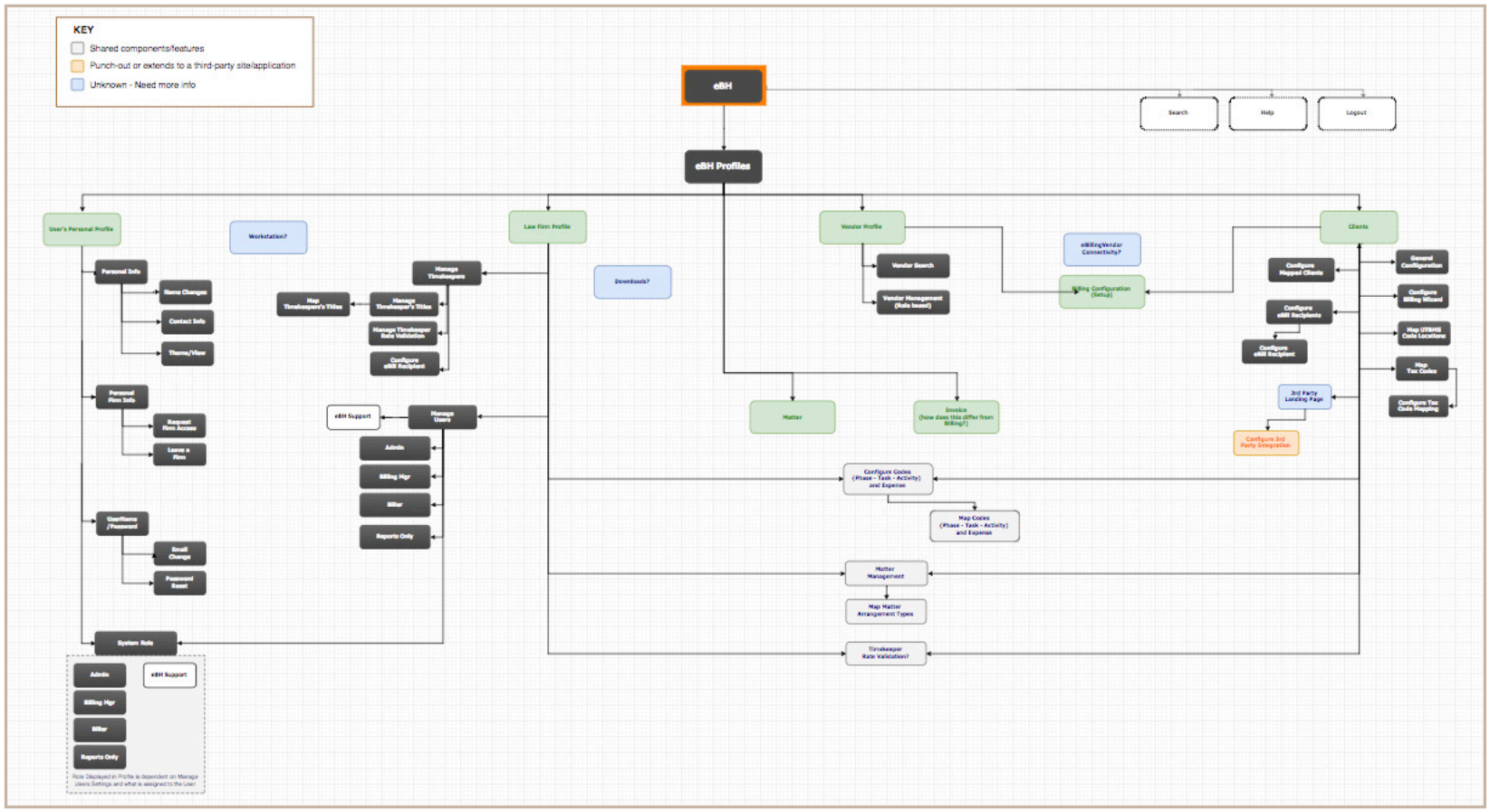
Final Results of Groupings



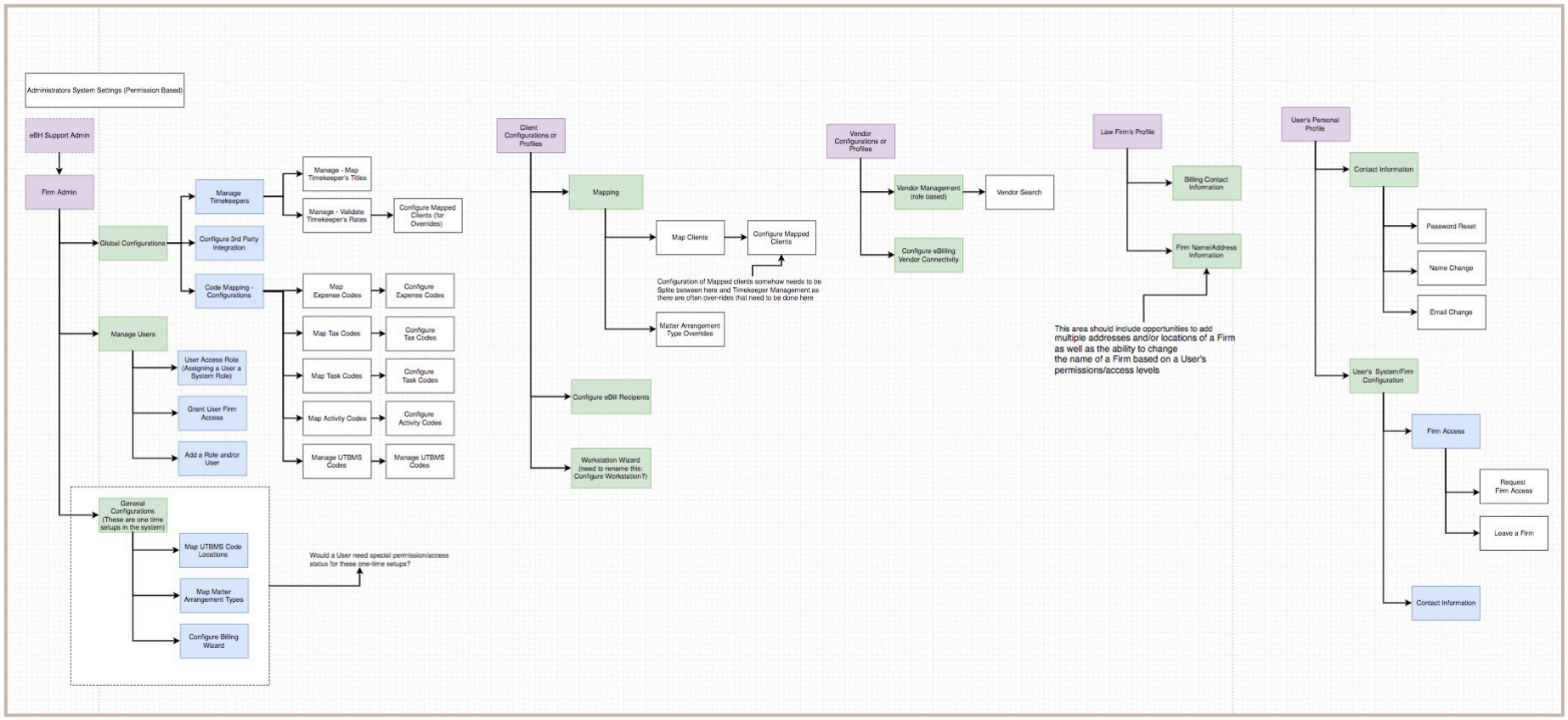
Recommendations

Site Map based off of Cardsort

The resulting sitemap from the initial cardsort results. As you can see, there was some discrepancies on where participants felt some functions belonged.



Recommendations

Proposed Site Map

The recommended site map for the profiles and configurators based on the Affinity Diagramming exercises.