

CARD SORTING

Keep the working record connected to evidence. Use another sheet when the scope or situation changes.

01 / QUESTION, SCOPE & DATE

What decision should the work inform? Record sources and what remains uncertain.

02 / FORMAT & PARTICIPANTS

Open, closed or hybrid? Whose information needs should be represented?

CARD SET & PILOT

List representative items. Check ambiguous wording before the study.

03 / GROUP 1

Name, card IDs and participant explanation.

03 / GROUP 2

Name, card IDs and participant explanation.

03 / GROUP 3

Name, card IDs and participant explanation.

04 / AMBIGUOUS ITEMS

Which placements differ, and when do people need the information?

BELOW THE SURFACE

A category can hide a timing difference.

DIFFERENT PLACEMENTS

Which item was placed differently?

TIMING & CONTEXT

When does each person need this information?

PROPOSED STRUCTURE

What grouping and labels will you evaluate?

ALTERNATIVE ROUTE

Could contextual links support another need?

FINDING TASK

How will you check the proposal with a realistic goal?

OWNER & REVIEW

Who follows up and what would change the proposal?