GREY VANCOUVER'S INFORMATION ARCHITECTURE PROCESS

by

Christopher LeBlanc

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Approval

Name:	Christopher LeBlanc
Degree:	Master of Publishing
Title of Project:	Grey Vancouver's Information Architecture Process

Supervisory Committee:

Roberto Dosil

Senior Supervisor Senior Lecturer, Master of Publishing Program Simon Fraser University

Dr. John Maxwell Supervisor Assistant Professor, Master of Publishing Program Simon Fraser University

Andrew Mellenger Industry Supervisor Interactive Account Director Grey Vancouver, Vancouver, B.C.

Date Approved:

<u>December 20, 2010</u>

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Abstract

This project report provides an overview and analysis of Grey's process for developing the information architecture (IA) of two client websites: UBC Electrical and Computer Engineering and the Kelty Mental Health Resource Centre. The report details the initial stages of IA development, including research into user groups, and covers the development process prior to site building. Further, the report discusses the process and purpose behind usability testing for the two websites, and details key findings and recommendations for improving the IA.

Finally, this report concludes with a comparative analysis of the IA development process for both websites, noting key similarities and differences, as well as recommendations for improving the process. By examining Grey's IA development process, this report shows how integral it is to identify the needs of key user groups early on, as these findings will influence the development process throughout the entirety of the project.

Keywords: Information Architecture, Website Development, Key User Groups, Usability Testing

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Chapter 1 – Information Architecture and Grey Vancouver

"Bad buildings and bad web sites share similar architectural roots. First, many architects don't inhabit the structures they design. They don't fully understand the needs of their customers, and they're not around to suffer the long-term consequences of poor decisions."

A considerable understanding into what motivates users to come to a website – and what their needs are once there – is integral to creating a user-friendly online experience. Web developers must first identify who their target audiences are before any development into the navigation structure can begin; and by identifying the primary and secondary user groups, they can flesh out how these users will interact with the website.

The term "Information Architecture" (hereafter referred to as IA) is often considered to have a complicated definition, and is a concept that has been consistently questioned, ridiculed, and critiqued by scholars and online experts, among others. However, Louis Rosenfeld and Peter Morville provide a fairly straightforward depiction of IA, as being:

The combination of organization, labeling, and navigation schemes within an information system... (and) the structural design of an information space to facilitate task completion and intuitive access to content. (It is) the art and science of structuring and classifying web sites and intranets to help people find and manage information.²

¹ Louis Rosenfeld and Peter Morville, *Information Architecture and the World Wide Web*, {New York: O'Reilly and Associates, Inc., 2002), 4.

² Ibid, 5.

The process of developing a website's IA is much more than just organizing content into a navigation structure; it also requires consideration of the actions users will make once they arrive on the website. If users cannot easily find the content they are looking for, the chances of them spending a lot of time on a website – or returning in the future – greatly diminish. While information architecture may be a complicated concept, understanding its importance is integral for the creation of new websites.

Although Grey Vancouver (hereafter referred to as Grey) is not a traditional "web shop" it offers an integrated in-house interactive team who are responsible for creating small- and large-scale websites. Grey has operated in Vancouver since 1974, and has been a part of the Grey Global network of marketing services and advertising agencies since 1986. Grey companies report to Grey Group, in New York. In 2005 Grey became part of WPP Group plc, one of the world's largest marketing services companies. Grey Vancouver, Grey Toronto and Grey Kitchener/Waterloo make up Grey Canada, part of the Grey Global organization with over 100 offices around the world.

The Interactive team at Grey Vancouver includes the Interactive Account Director/Web Developer, Interactive Art Director and the Account Coordinator/Content Producer. My role at Grey began as an Interactive intern during the May of 2010, where I provided support to the website projects, including oversight of content production by the clients. In August I was hired as the Account Coordinator/Content Producer, responsible for the development of content for the website projects, as well as project management and support. The Art Director's responsibilities include the creation of wireframes and design concepts, as well as managing the overall strategy for the IA development process. The Interactive Account Director/Web Developer is responsible for managing the scope of the project, as well as building the website. However, the team works closely together on all aspects of a project; for instance, while the Art Director

manages the IA process, the entire team develops the recommendations together before presenting them to the client.

Grey's philosophy for content hierarchy and information architecture is based on insights they have developed over the last 10 years of building websites for clients. The following is from a new business response Grey's Interactive team created for a potential client, and offers a breakdown of their insights and fundamental philosophy for developing websites:

"Users spend 95 percent of their time on other websites. This leads us to adhere to best practices in web design so the experience isn't frustrating for visitors [...] The human mind can only make a decision on five to nine complex objects at once. By developing user flows and content hierarchy with this in mind we never overwhelm the visitor with information or choice. Websites are applications. We look at your content, unique brand position and users to build useful applications out of your content so users have a reason to come back."

At the centre of Grey's process for IA development is the objective of providing a seamless, user-friendly experience, particularly through a navigation system that is simple yet effective.

For each website they produce, Grey utilizes a process involving substantial research, planning and strategy prior to any IA development. A consultation period kicks off each project, where Grey works with the client to identify the website's potential primary and secondary user groups. Interviews with key stakeholders are conducted in this phase, providing Grey with a deeper understanding into how and why users would land on the client's website. Findings from these stakeholder interviews are presented to the client to showcase the key needs of their users, emphasizing that satisfying the needs of these users should be the main priority for the website.

Once research into the user groups is completed, Grey's process moves into a planning and strategy phase that involves sessions with the client to determine key features and site requirements. A content audit of the current website (if applicable) is conducted by Grey, which allows for content recommendations, such as new features or content sections, to be made to the client. By working closely with the client Grey is able to assess the content requirements of the website and organize the content into categories, keeping the needs of the user groups in mind. Grey compiles the findings of this strategy phase to begin development of the functional design of the website, including a site map based on the content audit and research into user needs. A top-level navigation – the main menu system of the website – is proposed in a revised content map. Once the new content map is approved, wireframes are developed; these barebones concepts of key landing pages, void of any design, are used to illustrate how content will appear on the website. Chapter Two provides an in depth overview of the IA development process from its initial stages.

Once the client has approved the proposed IA, Grey begins a creative execution process that includes the development of design templates. These templates allow the client to review, evaluate and approve the graphic language of the website forming an idea of how the IA and content of the website will be presented. The approval of design concepts is fundamental as design affects the IA development process; the design must work in conjunction with the proposed IA, and if a client does not approve of the direction of the design, the IA may be significantly affected. The development of design concepts is discussed further in Chapter Two.

To ensure that there are no glaring issues with the functionality of the proposed content map, Grey hires a third party IA specialist to conduct usability testing on many of the websites developed by the agency. Usability testing, which involves users testing

the navigation of the website, is intended to reveal any problems with the site navigation, and also allows for feedback on the organization of content before site building progresses to the point where major changes would significantly delay the project's schedule. Grey normally works with a wireframe version of a website for usability testing; however, there are unique cases where testing takes place near the end of the project, such was the case with the Kelty Mental Health website discussed later in this report. Feedback from the usability testing goes back to Grey's web developers and is incorporated into a revised version of the IA and design templates. Usability testing is an important step in Grey's IA development process, and is discussed further in Chapter Three.

Since site building follows the IA development process, it has been omitted from this report; however, the following has been included in this opening chapter to provide an idea of Grey's complete process for creating websites. Once the IA development and design concepts have been approved, Grey begins construction of the website. The Content Management System (CMS), which is the interface for constructing a website, is launched early into the process in order to create blank pages that reflect the proposed content map; this allows for content entry into the beta site, which is primarily handled by the client with guidance from Grey's Interactive team. The approved design concepts provide a framework for the website's theme to be brought online so that all involved can see the work in progress. Features are added, tested and made available for review in an organic way, using a release schedule and defined feedback process. Grey uses the Drupal CMS to build their client websites, as it is an open-source interface that allows for extreme flexibility with the development of a website, from the IA to the graphic design.

Chapter 2 – Examining Grey's IA Development Process

Following the identification of user group needs and stakeholder interviews in their consultation phase, Grey's process in IA development enters a comprehensive phase of research, strategy, planning and analysis of content needs. Part of the strategy involved is to conduct a content audit of the current client website (when applicable); and during this audit, Grey identifies how the current content of the website can be categorized into a new top-level navigation scheme. Results of the content audit are then presented to the client, and a meeting is held to determine content needs and to flesh out the overall strategy for IA development. The objective is to nail down a solid content map for the new website that satisfies the needs of the key user groups. The content map is then used to influence the development of wireframe templates and eventually design concepts. This chapter outlines how satisfying the needs of the key user groups remains at the forefront of all IA decisions made by Grey.

Case Study: The University of British Columbia's Electrical and Computer Engineering

The Electrical and Computer Engineering program at UBC (hereafter referred to as UBC ECE) began a comprehensive rebranding process early in 2010. Seed Ideas, a company specializing in brand strategy, was hired by UBC ECE to complete the process. Seed Ideas suggested the importance of addressing rebranding efforts online, and proposed a total redesign of the UBC ECE website. UBC ECE faculty had admitted that their current website at the time appeared extremely dated in terms of design. Seed Ideas contracted Grey to complete the redesign of the website, with the aim of creating

an online experience that catered primarily to prospective UBC ECE students. Grey began working on the website redesign project in April of 2010, and launched the site (https://ece.ubc.ca) in October of the same year.

Competitive Analysis and "Visioning" Session

One of the first steps in Grey's IA development process was to research and review the websites of other Electrical and Computer Engineering programs throughout North America, and to provide an analysis of the top-level navigation of each to the client. The top-level navigation refers to the main navigation bar of a website. Other ECE schools (or similar programs) reviewed were Stanford, Harvard, and U of T; in total, 14 websites were examined.³ The primary objective was to determine common top-level navigation items among these websites. All results were compiled into a Microsoft Word Excel matrix and presented to the client prior to the visioning session, in order to illustrate the best solutions that could influence Grey's IA development. Common toplevel navigation items included areas such as: News, Research, Faculty, Programs, Prospective Students, and Admissions.⁴ These common navigation areas greatly influenced the development of the top-level navigation, as it showed how other schools were successfully displaying content. These areas also influenced development of the global navigation menu of the homepage, which includes items outside of the top-level navigation, but that are nevertheless given a prominent location on website, such as in the footer.

The presentation of the competitive analysis also included reviewing screen captures of all 14 websites reviewed,⁵ in order to provide insight into the design language of other schools. The primary focus of this discussion with the client was to showcase

³ Grey Vancouver, "Matrix of Top Level Navigation for ECE Schools"

⁴ Ibid.

⁵ Ibid.

best practices for providing content to users, such as through drop down menus that were not bogged down by too many items. Grey also stressed the importance of having a top-level navigation that reflected the needs of the primary user group; as UBC ECE identified their target audience as prospective students, Grey suggested that the website should be considered a recruitment tool first and foremost.

Following the competitive analysis review, Grey conducted a visioning session to identify content needs on the website. The session began by identifying key content categories. These categories included "Research", "Academic Programs", "Faculty", "Prospective Students", "Current Students", and "Industry and Alumni". Next, members of the faculty wrote down content needs that they believed were not addressed by the current website; or otherwise, existing areas that could be fleshed out. Notes were then sorted under each of the content areas to create a fully realized content map. At that point the faculty members were invited to offer opinions on how to best allocate content on the website, based on the needs of the key user groups. The visioning session also revealed the extreme complexity of the content requirements of the website as seen by UBC ECE faculty.

Finalizing the Content Map

The next step in Grey's process is to compile all results and feedback from the competitive analysis and visioning session, and propose a new content map. Ultimately, two content maps were created. The first content map proposed a top-level navigation that included: "Prospective Students", "Current Students", "Research", "Our Department", and "Alumni and Industry". However, as items from the visioning session were worked into this content structure, it became apparent that the navigation was too complicated, with content being buried in complex menu systems. Essentially, this content map attempted to accomplish too much in the top-level navigation.

Grey proposed that a second content map⁶ which reflected the site as a recruitment tool, would be a much more efficient way to go. The new top-level navigation was more influenced by the findings from the competitive analysis, and included: "Research", "Academic Programs", "Admissions", "Our Department", and "Student Life". With this second map, content needs for secondary user groups would be displayed using the footer menu, the global navigation and through blocks on the homepage.

Both variations of the content map were presented to the client; Grey stressed the importance of developing the site as a recruitment tool, and that the second content map was the most effective solution. The client agreed that the needs of prospective students should be an important focus; however they had reservations about content for other user groups being buried in the website's footer menu. It is important to note that the UBC ECE faculty seemed particularly focused on their personal needs of the website, such as intranet accessibility and internal functionality, rather than the needs of their user groups. As such, Grey consistently had to stress the importance of satisfying the needs of prospective students, as this was the main objective of the website.

An Analysis of UBC ECE's Website by ECE Undergraduate Students

As part of their final project for the ECE program in 2009, ECE undergraduate students Ben Wai and Miguel Guanlao completed a comprehensive analysis of the UBC ECE website. Once learning of the report, Seed Ideas requested a copy from UBC ECE so that Grey could review its findings. This report was delivered following the content sorting exercise, and during the development of the content maps. Most of the ECE faculty and staff, as well as a number of key stakeholders, such as prospective students and alumni, had been interviewed for the report and asked about their thoughts on how to improve the website. The report outlined numerous recommendations, many of which

⁶ See Appendix A, "Grey Vancouver, UBC ECE Content Map, V2".

falling in line with Grey's direction of developing a website focusing on the recruitment of prospective students.

The report surveyed both internal and external stakeholders, the latter group comprised of those within the ECE industry, and also prospective students, who identified several concerns for the website.⁷ The majority of stakeholders interviewed noted that content on the website needed to be refreshed in order to appeal to external audiences, particularly high school students; these stakeholders in particular felt that their needs were not met by the website. A number of stakeholders suggested that the UBC ECE website should showcase past and ongoing projects, such as those from research groups and undergraduate project courses, with the aim to promote the unique and interesting aspects of the program, which may encourage prospective students to apply. Improving the navigation structure of the website was also deemed as extremely important, as stakeholders felt the current system was extremely flawed in that it was difficult to locate content.

UBC ECE faculty members had consistently expressed skepticism to Grey about promoting their research on the new website. Faculty insisted that prospective students, such as high school students, would not be interested in research, as undergraduate students work solely on projects and are not involved with the research that would be featured on the website. However, the report completed by Wai and Guanlao suggested otherwise. In order to sell the idea of promoting research to the client, Grey presented the findings of the website analysis completed by the two students, along with the results of Grey's own stakeholder interviews previously conducted with high school students. Grey also suggested promoting interesting undergraduate and graduate projects through the homepage hero stories. With a tremendous amount of supporting research and a

⁷ Miguel Guanlao and Ben Wai, "Requirements for the UBC ECE Website," (Vancouver: UBC ECE, 2009), 12.

solid strategy for execution, UBC ECE faculty members agreed to the recommendations made by Grey.

Wireframe Development and Presentation of Design Concepts

It is worth reviewing the importance of wireframe and design concept development, which are integral in helping the client understand the proposed IA strategy. As previously discussed, the client had reservations about content being buried in the site, especially for those outside of the prospective students user group. For each website project completed, Grey presents wireframe mockups of key landing pages to the client in order to illustrate how the content will be organized.

However, for this project Grey presented a single wireframe⁸ of the homepage in order to emphasize how content for users would be easily accessible outside of the toplevel navigation, through the use of the footer, the global navigation menu and through blocks on the homepage. Design concepts⁹ were then developed to provide the client with a perspective on how the final site will look once completed. After reviewing the wireframe and design concepts, the UBC ECE faculty became very supportive of the proposed IA strategy. No revisions to the wireframes or proposed design were requested.

Case Study: The Kelty Mental Health Resource Centre

Through British Columbia's Mental Health and Addiction Services, the Kelty Mental Health Resource Centre (hereafter referred to as Kelty) supports BC children, youth and their families affected by mental illness or addiction, by providing the resources and guidance needed in order to make informed decisions and gain access to appropriate services. The client required a website that allowed them to take their services online; the objective was to create a resource hub providing guidance and

⁸ See Appendix B, "Grey Vancouver, UBC ECE Wireframes".

⁹ See Appendix C. "Grey Vancouver, UBC ECE Design Concept".

information on mental health topics. Grey began working on the Kelty website redesign in March of 2010, and launched the site (https://www.keltymentalhealth.ca) in October of the same year.

Identifying the Website's Purpose

Grey was able to acquire a good sense of the needs of the key user groups through a number of sessions with Kelty and also through stakeholder interviews; however, a looming problem was that at the time, the website had only a few web pages of content and those at Kelty had not fully worked out just what they wanted to accomplish with it. Therefore, prior to the visioning session, Grey had little to go on in terms of what the website would require. This is significantly different to the research and strategy phase of the UBC ECE project, as ECE's site at the time had enough content on it for Grey to determine key content areas prior to the visioning session, which provided excellent insight into the overall purpose of the website. The question of what Kelty wanted their website to provide arose many times during the IA development process, and was a cause of several delays.

The meeting with Kelty was primarily held to determine what the organization had envisioned with expanding their communication efforts into the web. It was during this meeting that they stated they did not want to "recreate the wheel," so to speak, in that they did not want to replicate or compete with what other mental health organizations were doing online. Instead, Kelty wanted a website that was first and foremost a useful tool for their users, by providing direction to resources and information. In a sense, they saw their new website as a Wikipedia-like resource hub, with references linking people to useful external websites. Once Kelty identified their own goals for the website, Grey was able to start working on a structure for presenting the content to users.

An audience profile, with specific tasks outlined for each user group, was created by Grey in the early stages of the IA development phase to better understand what content users would look for on the website. According to the profile¹⁰, the primary users were parents and caregivers seeking information on mental health and substance use, with secondary users being service providers and other similar stakeholders. Following the presentation of this profile to Kelty, the secondary user groups were redefined as healthcare professionals and school professionals.

As work on identifying the content areas progressed, Grey determined that Kelty's key content categories were mental health topics, substance use issues, treatment options and healthy living tips. Mental health items included a list of disorders, while substance use had information on addictions; treatment had information on managing a mental health, including information on medications, and healthy living had suggestions for managing a mental health issue through proper diet, exercise, sleep, and so on. Unlike the content map for the UBC ECE site, which was questioned heavily by the client, Kelty approved the first content map¹¹ presented by Grey.

Wireframe Development

While the content map was approved by Kelty fairly quickly, several issues soon arose in terms of content requirements. As previously discussed, Kelty had not fully conceptualized what the primary purpose of their website was; and while the key content categories had been identified, the length of content within those categories was unknown, which significantly impacted wireframe development. Wireframes are intended to show clients how their content will be organized on a website; but with no content on their current website, this meant that the entire website required new

¹⁰ Grey Vancouver, "Audience Profile and Tasks Matrix".

¹¹ See Appendix D, "Grey Vancouver, Kelty Content Map V1".

content. As the content had yet to be written by Kelty, this meant that Grey's proposed wireframes were also a suggestion for how content could be written; and since the project team at Kelty had little experience developing websites, they required direction from Grey on how to go about creating the content.

Originally, Kelty intended to have their website act much like Wikipedia, with introductory paragraphs directing people to clink on links to outside resources. However, Grey proposed that Kelty should provide basic information to users on the website before referring them to other websites. Grey noted that many people afflicted with a mental health issue are oftentimes looking for basic information; and since Kelty is considered a trusted source, their website should attempt to cover basic topics. The "Mental Health" category in the content map was then used as an example for how content could be written, and a wireframe of a Disorder landing page was created¹². A tabbed interface for a Disorder page was introduced showing "The Basics", "Signs and Symptoms," and "Treatment" options. Resource links to other websites were then presented as "Further Reading", emphasizing that these resources were additional to the content that Kelty offered. Grey also presented a homepage design comp¹³ during this presentation to illustrate how the IA would work with the visual design.

Identifying Unique Content Needs

Presenting the Disorder page wireframe proved to be a step in the right direction for the IA development; once Kelty saw how content on their website could serve their users, they began to brainstorm other potential ways of helping people through new content. The treatment of the Disorder pages was expanded to include four tabs, titled "What Is It?", "How Does It Look?", "What Can I Do?" and "Where To From Here". Each

¹² See Appendix E, "Grey Vancouver, Kelty Disorder Landing Page Wireframe".

¹³ See Appendix F, "Grey Vancouver, Kelty Homepage Design Concept".

of these tabs, with simple titles to allow for a user-friendly experience, explains the various aspects of each disorder, ending with an appropriate send off to helpful resources in the "Where To From Here?" tab. Further, the titles of the tabs reflect Kelty's intention of providing content written for users with a basic reading skill level.

Kelty had stated early on that they had numerous resources to be displayed on the website; but when the time came to begin uploading content to the development site, Grey discovered that Kelty had hundreds of unique resources, all linked to specific topics and categories. These resources were primarily derived from printed toolkits they already possessed, or other online resources they had gathered. The original plan was to organize these resources into a comprehensive library; however, Grey proposed using tags to feed the correct resources into the corresponding pages. Resources could be tagged to a specific Disorder page, for example, or also to pages for one of the key user groups. This system of tagging also provided a more rewarding experience for users, as it provided them with more channels for discovering information, and allowed for a dynamic and useful means of promoting content.

Previously, when someone in need of help contacted Kelty, mostly through a phone call or an in person visit, Kelty would often give people a quick reference guide to finding help, in the form of a sheet of paper with website URLs and phone numbers written on it. This presented a unique opportunity for an interactive application on the website, which would provide people a useful tool for resolving their issue. The structure of navigating the options for finding help required careful thought, as users would need an easy-to-use tool for quick reference. Grey suggested using a simple column navigation.¹⁴ With four columns beside one another, users would start on the first and choose whether their issue was an emergency or non-emergency, and once an option was

¹⁴ See Appendix G, "Grey Vancouver, Kelty Finding Help Design Concept".

chosen, they were presented with additional options in the next column, and so on until a final resolution that normally involved a phone number to call or a website to visit. It was important to keep content concise in this application as well, as users would likely be looking for quick answers. By identifying these unique content needs early on, Grey was able to determine the best means of implementing these requirements into the functionality of the overall IA.

Finalizing the IA

Once the client approves Grey's recommended IA strategy, which includes the finalized content map, wireframes and design concepts, they build the content structure on to a development site. The development site, which is void of any design, is constructed early on for two reasons; for the migration of content and for usability testing. Grey employs usability testing to finalize the IA development of their websites, as well as to confirm that the IA recommendations presented to the client satisfy the needs of the key user groups. Usability testing is conducted in order to flesh out any potential problems with the website's navigation. Additionally, depending on when the usability testing takes place, users may also be asked to provide feedback on content and visual aesthetics. The following chapter outlines the usability testing process for the UBC ECE and Kelty websites.

Chapter 3 – Usability Testing

Usability testing, which involves users testing the navigation of the website, is intended to reveal any problems with the site navigation, and also allows for feedback on the organization of content before site building progresses to the point where major changes would significantly delay the project's schedule. Part of Grey's usability testing process includes using a third party specialist to conduct the testing, to guarantee unbiased results on the final IA recommendations. This third party specialist works with the Account Coordinator on Grey's Interactive team to identify the needs of key user groups, develop scenarios based on those needs, produce questions to be asked during testing based on the scenarios, and coordinate testing. The usability specialist compiles the testing results into a comprehensive report outlining key issues that arose during testing, and offers recommendations for improving the IA. For the UBC Electrical Computer and Engineering website, as well as the Kelty Mental Health website, Key Pointe Usability Consulting was hired to conduct the usability testing.

As the point person for coordinating the usability testing, the Interactive team's Account Coordinator is involved with researching and hiring the third party specialist, reviewing the project with the consultant, identifying the user groups and their needs, outlining potential issues, and managing the process of recruiting users for testing the IA. During the usability testing sessions of both the UBC ECE and Kelty websites, the Account Coordinator was present to assist in any way necessary, such as resolving technical issues, or clarifying questions.

Once the specialist completed the usability reports, it was the Account Coordinator's responsibility to review the document and ensure it met the standards held for all client-facing documents delivered by Grey. Usability reports delivered from Key Pointe on the UBC ECE and Kelty websites both required substantial editing and comprehensive changes in order to be delivered to the client. Once these reports were finalized, the Account Coordinator was responsible for reviewing the findings with the Interactive team and ensuring all key issues were accompanied by a solution. A summary of each report was then presented to the client, including the recommendations for proceeding with the projects. During the presentation and review of the usability reports, the clients were invited to ask questions and comment on whether they were satisfied with Grey's recommendations. The presentation on the reports concluded with the client signing off on recommendations, allowing for the Interactive team to proceed with finalizing the IA development.

Reviewing the usability testing process provides profound insight into how Grey finalizes the IA development of their websites, and showcases how satisfying the needs of users remains at the forefront of their overarching process. Further, by analyzing key issues that arose during testing, as well as the recommendations on resolving those issues, a deeper understanding of the complexity behind the IA development process can be attained. Key similarities and differences surrounding the usability testing of the UBC ECE and Kelty websites will also be identified to provide further analysis of Grey's process with finalizing IA development.

Case Study: UBC ECE Usability Testing

Usability testing of UBC ECE's website was conducted on the week of June 14, 2010 during several sessions with prospective students and current undergraduate students. In order to test the navigation of the website, the proposed site map that was

approved by the client was taken and developed into an interactive wireframe site. This "bare bones" version of the website was stripped of any visuals, which ensured that users remained focused on the functionality of the navigation.

As outlined previously in this report, the substantial amount of content on the UBC ECE website required a navigation system that was easy to follow. Additionally, as the primary purpose of the website was to act as a recruitment tool for prospective students, it was essential that information pertaining to this user group was easy to locate. While no content was on the website at the time of testing, questions were designed to direct users to a specific page where they could find the information they needed. In order to develop these questions, Grey's Interactive team reviewed the needs of all user groups.

Outlining User Group Needs

The primary user group for UBC ECE's website is prospective students interested in applying to the ECE program. The secondary user groups of the website include current undergraduate and graduate students and faculty and staff who visit the website and engage with the content less frequently than prospective students. The tertiary user group of the UBC ECE website is alumni and industry professionals; these users were identified as visiting the website less frequently than the primary and secondary user groups, though they were also noted as engaging with the content more so than the secondary user groups. Once the needs of these user groups were identified, scenarios and questions were developed to direct users to relevant areas of the website. The following is a breakdown of the identified needs of each user group:

• For <u>prospective students</u>: information available on program requirements and admissions, entrance scholarships, information on faculty and classes offered by

the ECE program, student life and information on UBC, events, seminars, and projects offered by the ECE program.

- For <u>current undergraduate students</u>: co-op opportunities, course information (i.e. prerequisites for graduating, course descriptions), events and project presentations, faculty and staff information, professor profiles, reference materials, and information scholarships and finances.
- For <u>graduate students</u>: events (i.e. research proposals), faculty listings, course listings, research, and information on scholarships and finances.
- For <u>faculty and staff</u>: Intranet resources, events, course information, and job postings (i.e. how to post a job opening).
- For <u>industry and alumni</u>: events, networking capabilities such as LinkedIn (particularly for alumni), research and research papers, and donations to the program.

Recruitment of Users

Part of Grey's success with their usability testing process is that they recruit several users from each of a website's key user groups. The IA of a website is directed towards the needs of specific user groups, and much of the IA development focuses on how these particular users will find information specific to their needs. Having actual users of the website as participants confirms whether all previous IA preparation and development was on the right track.

However, one of the biggest hurdles of usability testing for the UBC ECE website was recruiting enough users for testing; Grey had hoped to recruit up to 10 users. As the testing session took place during the summer intersession period, very few current undergraduate and graduate students were still located at UBC or in Vancouver, as the majority of students had moved home during the summer. Further, prospective students to the ECE program were still in high school classes, or otherwise were unavailable to participate. Nevertheless, recruitment of prospective students was surprisingly easier than recruiting any other user groups, due largely in part to personal or familial connections Grey employees had with high school students who had applied to the ECE program at UBC. However, only two prospective students were available to participate in testing, and Grey had hoped to secure at least three to five students for testing. Recruitment of current undergraduates was a little more complicated, as only a handful of students were still located on the UBC campus during the summer session. In order to recruit these users, Grey reached out to several ECE society members through their program's Facebook group and was able to secure several users for testing.

However, recruitment for current graduate students, faculty and staff, and industry and alumni proved to be far more difficult. As was the case with current undergraduates, current graduate students in the ECE program that were contacted were either unavailable or no longer in classes during the summer intersession. The difficulty in recruiting faculty and staff was largely due to time constraints and busy schedules, as many were busy with research or otherwise were on vacation. Similarly, industry professionals and alumni of the ECE program who were contacted were also too busy to participate. In order to complete the test, an online questionnaire using SurveyMonkey.com was developed and emailed by ECE staff to their contacts within these user groups.

Once recruitment of prospective students and current undergraduate students was completed, two sessions were scheduled to conduct testing. Prospective students were invited to come to Grey's office for the session, while the session with current

undergraduates was held at UBC. Sessions took around a half hour per person, and participants were offered a Starbucks gift card as incentive to participate.

Creating Questions for Usability Testing

Grey's Account Coordinator was responsible for creating questions for each user group, based on previous research into the needs of the user groups. A total of nine questions were developed for each user group. Most of the questions were unique to the user group, though similar needs between different user groups resulted in identical questions being asked, particularly of industry and alumni participants of the online questionnaire. Additionally, three general questions were asked of all user groups at the end of the testing session:

- "Review the provided image of the homepage. What are your initial thoughts? Do you feel it is what you would expect to see?"
- "What did you like best about the site?"
- "What did you feel was confusing or irrelevant to your needs?"¹⁵

These general questions provided insight into key areas outside of the navigation of the website.

Questions were worded in such a way that participants were given a scenario that required them to navigate the website and find specific information. An example question for a prospective student:

"You're interested in applying to UBC's Electrical and Computer Engineering (ECE) program, but you're not sure if you meet the program's minimum

¹⁵ Putkey, Theresa, "Key Pointe Usability Testing Report for UBC ECE", 8.

requirements. Find where you could learn more about the program's minimum requirements."¹⁶

This question required the student to find information that was in the admissions section of the website, located in the top-level navigation. While both participants easily found this information, the usability specialist was responsible for noting all of the user's actions, including how long they took to find the information, if they initially looked in the wrong location, or if they were unable to locate the correct page. All questions were written with the objective of locating a specific page where the information would be found.

The Online Questionnaire

The usability specialist was not involved in the development and execution of the online questionnaire; Grey was responsible for writing the questions and collecting all feedback, which was then implemented into the final usability report delivered by the specialist. Questions were similar to those asked during the usability testing sessions, with the aim of having users locate a specific page. The questionnaire included a comment field for users to provide their answers, rather than having them answer through multiple choice; this allowed for a more in depth analysis of the feedback provided, as most participants identified key concerns or troubles they had when attempting to locate the correct page.

Summary of Findings and Recommendations

Six people participated in the usability testing of the new UBC ECE website over a period of two days. Two prospective students and four current students gave feedback on

¹⁶ Ibid., 10

the site. For the most part, the navigation in the wireframes met the needs of the prospective and current students, with a few exceptions outlined below. The prospective students compared it to other websites they had seen in their search for a university program and thought it ranked as one of the better ones.

Seven current graduate students, seven faculty and staff, one industry professional and eleven alumni completed the online questionnaire. The overall feeling towards the wireframes and concepts was generally positive. The current graduate students were excited about the changes, but expressed concern that the site would be overwhelmed with text, particularly on the homepage.

Rather than outlining every issue that came up during testing, the usability report focuses on key issues that arose multiple times, which signifies more prominent issues with the navigation. Below are five key issues that arose during testing, along with a summary of recommendations from Grey for resolving these issues.

1. Footer Links

All users tested were required to locate information on ECE events found through the Events link in the footer of the wireframe site. However, a number of student participants had trouble locating events. Grey recommended placing an events calendar under Student Life (in the top level navigation), which will show students that these events are meant for them. Students tested were also asked to find professor profiles, and some students clicked on Faculty and Staff in the footer to find this information. As the Faculty and Staff link in the footer is meant for internal use for ECE faculty and staff, the styling of the footer menu was changed to include a "Resources For" caption, identifying that items in the footer are broken down to resources for specific users.

2. Scholarships

Prospective students, as well as current undergraduate and graduate students were each asked to locate information on scholarships. The correct path for the question was for students to locate the scholarships page under "Admissions "in the top-level navigation. While entrance scholarship information belongs under the "Admissions" area, students correctly pointed out that there are scholarships and bursaries for current students as well, which had been previously overlooked by Grey and UBC ECE. Grey recommended placing all scholarship and bursary information for all current students under "Student Life", with information on entrance scholarships placed under the Admissions area.

3. Homepage Treatment

All users were asked to view sample design concepts of the homepage originally presented to UBC ECE, as well as to give their opinion of the treatment of the homepage on the wireframe website. Several faculty and staff respondents noted that the unique traits of the ECE undergraduate programs needed to be promoted more on the homepage. Grey recommended using the "hero" block on the homepage to promote both undergraduate projects and graduate research. These hero stories were accompanied by recruitment videos promoting the unique characteristics of the ECE program.

4. Job Board

Faculty and staff, as well as industry and alumni respondents were asked to locate where to find information on job postings on the ECE wireframe site. While most respondents successfully found this information under Student Life, several chose the Opportunities page for job listings. Against Grey's recommendation of developing a comprehensive Opportunities section, which would include job postings, UBC ECE

faculty eventually decided to move all job postings to the Our Department section of the top-level navigation.

5. Alumni and Industry Information

On the design concepts, "Alumni and Industry News" was placed in one of three prominent blocks of information on the homepage. Several faculty and staff respondents noted that students have no use for alumni news and industry news, and that these features should be given a less prominent location on the homepage. Grey noted during the usability report presentation that these features give credibility to the program by showing that the ECE program is connected to industry and alumni, and that their needs on the ECE website are important to the program.

Grey recommended keeping these features on the homepage; however, as content production progressed it was determined that UBC ECE had insufficient content to build out these sections in time for the initial site launch. The block's content was replaced with a feed to the events calendar.

Conclusions and Next Steps

Overall, the UBC ECE faculty members were satisfied with the recommendations presented by Grey. The IA proposed by Grey remained intact, with only minor changes made. Following these changes, site build began on the UBC ECE website; however, it should be noted that IA development continued well into the site build process. An example is the treatment of the Alumni and Industry News block on the homepage (as outlined above), which illustrates that the many factors behind IA development.

Case Study: The Kelty Mental Health Resource Centre Usability Testing

Usability testing on the Kelty Mental Health Resource Centre website redesign was conducted on September 23, 2010. The testing was done using nine participants, two parents, five healthcare professionals, and two teachers, which were led through inperson testing. While the usability testing process for Kelty was similar to that conducted for UBC ECE usability testing, users were tested on a website that was much further in development, rather than just a wireframe version. Much of the visual design of the website was present, including a functional homepage hero scroller and drop down menus for the top-level navigation. Additionally, many of the website's pages were already populated with content. However, the primary purpose of the usability testing remained the same, with participants mostly responding to questions regarding the functionality of the site navigation.

Outlining User Group Needs

Grey chose to use Key Pointe again for conducting the testing sessions, and the specialist was tasked with writing the questions this time around. A meeting between Grey and Key Pointe that was conducted to outline the needs of the three user groups: parents and caregivers, healthcare professionals, and school professionals. Parents and caregivers visiting the Kelty website were noted as likely doing so due to concern for their child's mental health. Healthcare professionals would likely visit the website in search for information and resources to then relay to parents and caregivers. School professionals, such as counselors, would use the Kelty website to find more information on youth mental health, particularly if they are concerned that a student has a mental health issue.

While Kelty's three user groups have relatively similar needs – in that they all are searching for information on mental health issues in children – it was important to identify the various scenarios that these users may face when coming to the website. For example, while a parent or caregiver may visit the website to find out more information on an issue such as anxiety, a healthcare professional would visit the website following a consultation with a parent or caregiver, and search for resources and information that could help them. The majority of the website's content is written for all three user groups; however, the way in which these users would search for the information is extremely diverse.

Recruitment of Users

As Kelty is located in the Mental Health and Addiction Services building of the BC Children's Hospital, there was little concern in recruiting enough users for testing. Parents and caregivers who were recently connected to Kelty were asked to participate, rather than people who were familiar with Kelty. Grey felt that those unfamiliar with Kelty would provide more insight into the navigation. Further, Kelty's long-standing relationship with the hospital was used to reach out to medical professionals and school counselors, who work closely with Kelty on programs and services.

Creating Questions for Usability Testing

Questions were once again written by providing an understanding of the needs of Kelty's three user groups. Grey briefed the specialist with enough background material and a comprehensive overview of the project in order to form the questions for the testing sessions. The questions written were very similar to those used during testing for the UBC ECE website, with the objective to drive users to a particular web page with the correct information. An example question for a parent or caregiver:

"Your child has recently been through a traumatic event and has been having some emotional problems. A friend said he may have post-traumatic stress disorder, but you're not convinced. You'd like to find out more about PTSD before consulting a doctor. Please find more information about Post Traumatic Stress Disorder."¹⁷

Once again, questions were written as real world scenarios that users could relate to. As the needs of Kelty's three target user groups are fairly similar, in that they all are seeking information on mental health topics, similar questions were asked for each user group, while slightly reworded. An example of a question reworded for a healthcare professional:

"A patient's child has recently been through a traumatic event, and a family friend mentioned to the parent the child is suffering from post-traumatic stress disorder. You'd like to give the parent some online resources about PTSD. Please find more information about Post Traumatic Stress Disorder."¹⁸

Overall, users were very receptive to the questions asked, and oftentimes would reference stories from previous personal experiences.

Summary of Findings and Recommendations

The overall comments towards the site were very positive. The majority of the participants said the site was well-organized, visually impressive and was helpful to their needs. At least three asked when the site would be ready, anticipating they would use it

¹⁷ Putkey, Theresa, "Key Pointe Usability Testing Report for Kelty Mental Health Resource Centre", 6.

¹⁸ Putkey, Theresa, "Key Pointe Usability Testing Report for Kelty Mental Health Resource Centre", 8.

when launched. After introducing the participants to the usability session and how it would work, the participants were asked up to 14 questions to get their feedback on the site. The feedback fell into two different types: comments on the design and comments on the content.

Once again, rather than outlining every issue that arose during testing, the usability report focuses on key issues that arose multiple times, which signifies more prominent issues with the navigation. Below are the four key issues outlined in the usability report.

1. Disorder Tabs

Users were asked to navigate to a specific disorder during the testing and to read through the content to find specific information. However, a number of users overlooked the tab feature in the Disorder pages. Grey recommended placing a link at the bottom of each tab, which would enable users to scroll to the next tab. This link would also have a call to action that would let users know there is more information. Further, the link would also solve the problem of users having to scroll back to the top of the page to click on another tab

Several users also raised concern over the treatment of the tabs; for example, they noted that the 'Where To From Here?' tab should only list contact numbers, websites, books and toolkits on the topic. Grey recommended that Kelty review each tab and determine the best treatment of content. Additionally, an external writer was hired to review all site content.

2. "See Also" Reference Links

Users noted several concerns with the treatment and functionality of the "See Also" reference links (found in the Disorder pages). These concerns included: (This bullet point approach will resolve some of the "hanging sentences" I identified early on the report.)

- Not being aware that the reference links were taking them off of the Kelty website
 - Grey recommended implement icons and developing proper calls to action to ensure users are aware of what they are clicking on.
- The font being too small to read for a number of users.
 - A smaller font for the "See Also" area was used to signify that the resources are additional content to the main copy; however, Grey reviewed the style and increased the font size, while also giving more separation to the reference area. As a number of the participants during testing had poor eyesight, this was an important issue to address.

3. Search Box

The majority of users utilized the Search feature of the website to find content they were looking for. However, several users with basic computer skills did not realize they had to hit the Return key to activate the search.

• Grey designed and implemented a Search button that was placed next to the Search box. While this was a simple solution, it was nevertheless an issue that was important to the key users of the website, who may have more basic computer skills than others. This issue prompted the team at Grey to recall that not all computer users are familiar with the functionality of websites.

4. Landing Pages

Several users were confused with the homepage hero stories; users in the medical professional group who were tasked with finding information for parents would look under the "Parents and Caregivers" section.

• Users noted a desire to see landing pages for each of the three user groups, which was also recommended by Grey. These landing pages were developed with the help of the Kelty project team with the aim of ensuring that users are directed to relevant content.

Conclusion

Grey's process for developing the IA of large-scale websites follows the core principle of delivering a framework that satisfies the needs of key user groups. While this principle remains at the forefront of all decisions on IA development, the overall process nevertheless must adapt to the unique circumstances of each website project. Further, while the results of Grey's process have shown to be extremely effective, as evidenced by the positive reactions with users during usability testing, there are a few concerns identified in this chapter on both the UBC ECE and Kelty projects. This chapter deconstructs the findings previously examined in this report, and presents recommendations on how to possibly improve Grey's IA development process.

As discussed in Chapter 2, the preliminary research and planning Grey normally conducts at the beginning of each website project is integral for establishing the key objectives. In the case of both UBC ECE and Kelty, both clients required the assistance of Grey to fully realize what key user groups would need from their websites. Research and a competitive analysis allowed for Grey to sell UBC ECE on promoting their program's unique research and projects, by illustrating what other similar programs were successfully accomplishing online. With Kelty, Grey's strategic planning was used to provide the client with a clearer understanding of what could be accomplished with their website, which led the client to define the core concept of the website as a resource hub. The focus on delivering concrete findings early on in the project allows Grey to justify and support all recommendations presented to clients; and as discussed in Chapter 2, these findings are regularly revisited during the course of a project.

As a full-service advertising agency, Grey's dedication towards building and sustaining client relationships is extremely important factor in completing a project. Since Grey's Interactive team works closely with clients throughout the entirety of their web projects, it is important to continuously ensure that the direction of the project is always clear to the client, particularly clients with many stakeholders. The difficulties outlined in Chapter 2 with UBC ECE, who were unsure of the proposed direction of their site, indicate that the process of building a website is no different than the core concept of advertising, which is to sell an idea. Grey's ability to maintain client relationships is not in question, nor is there ability to sell an idea to a client; however, the case of UBC ECE shows that clients at times put their own online needs ahead of the needs of the key user groups. Even though the direction of the site as a recruitment tool had been approved, UBC ECE faculty were more concerned with how the site would work for them. In order to sell the client on the idea again, Grey completed more research and presented their findings – including a document completed by UBC ECE students – that supported the previously proposed strategy of focusing on the needs of prospective students.

While Kelty had an excellent sense of the needs of their key user groups, the problem was determining what they wanted to accomplish with their website. While several members of the UBC ECE faculty were experienced with the back- and front-end development of websites, the Kelty project team had no knowledge or experience and required the direction and advice of Grey. With Grey's help, Kelty identified the mandate of their website as similar to their overall mandate, which is to direct people to the resources and help they need. While it may seem like an obvious point, it is nonetheless easy to forget that most organizations looking to create a website have little to no experience or knowledge on best practices; or worse, they may read up on topics like social media and consider themselves experts on the matter. It is because of these basic

reasons that a close relationships between client and consultant is integral in the IA development process, as proven by the synergy between UCB ECE and Kelty and Grey.

Content maps developed for both UBC ECE and Kelty followed the same objective of keeping things as simple and intuitive as possible. As website users can easily become frustrated if they do not quickly locate the content they are looking for, keeping the navigation system simple allows for maximum usability. With UBC ECE, two content maps were developed. The first map was too ambitious of an approach, as it attempted to accomplish too much within the top-level navigation; the second map, on the other hand, provided a simpler and more user-friendly experience. Although, UBC ECE faculty had some reservations about using the second content map, Grey reassure them that the core idea behind the website needed to be followed; and with UBC ECE, the idea was having the website as a recruitment tool.

The discussion on wireframes and design concepts in Chapter 2 illustrates how these deliverables serve to solidify the proposed IA. With UBC ECE, wireframes and design concepts provided the client with an understanding of how the content would be displayed, while Kelty saw them as beneficial towards fleshing out the content needs of the site. Before the presentation of wireframes and design concepts, UBC ECE faculty had a difficult time envisioning how their website would work for all user groups, and were concerned that the focus on prospective students neglected other users. However, upon viewing the wireframes they began to understand the benefits of having a simpler top-level navigation directed at their primary user group, and the design concepts served to solidify Grey's direction with the IA. Wireframes for Kelty actually directed the concept development of content for the website, as prior to the presentation of wireframes Kelty had not thought through how in depth the content on their site would

be. Wireframes and design concepts are fundamental for developers, designers and the client to understand how any given site will work.

Usability testing for the UBC ECE and Kelty websites provided an invaluable insight into issues with the IA that had been overlooked. As Grey is working closely on the IA of a website during a significant portion of a project, it can sometimes be easy to miss some of the smaller issues that a fresh set of eyes have a better chance of seeing. An excellent example of this is the treatment of the Disorder tabs on the Kelty website; while Grey was familiar with their functionality, those who were seeing the site for the first time easily missed the tab interface, noting that it was not prominent enough on the page to catch the eye. Recruiting users from the key user groups also provided a unique perspective on how these users will interact with the website. With UBC ECE, current students correctly indicated that not all scholarship information belonged in the Admissions section; a point that had previously been overlooked by both UBC ECE faculty and Grey. With Kelty, usability testing revealed that a large number of one of Kelty's key user groups had only basic computer skills, which impacted how they would navigate on the site. While no significant problems with the IA were found during usability testing, results compiled by the specialist nevertheless revealed issues that impacted the functionality of the websites.

Grey's success with developing the IA of websites can be seen by viewing the functionality of the websites created by the agency. However, examination of the UBC ECE and Kelty websites allows for a critical view of some aspects of the process. The development of content maps can sometimes be a daunting task, as the IA developers must organize and categorize complex content that meets the needs of a wide variety of user groups. Content map development for UBC ECE, key stakeholders had concerns with placing content for users other than prospective students in the footer menu. Grey

was able to sell the client on this approach by again reassuring that the site should be a recruitment tool; however, in this case Grey's recommendation pushed key pieces of content to an area that those user groups may not view. Footer menus that are "below the scroll" – which refers to the area of the website that requires the user to scroll down – can be easily ignored by users who are looking to quickly find the information relevant to them. While Grey's proposed IA worked well for prospective students, and the client was eventually sold on the direction, content for other user groups could have been given a more prominent location than in the footer menu, such as on the homepage.

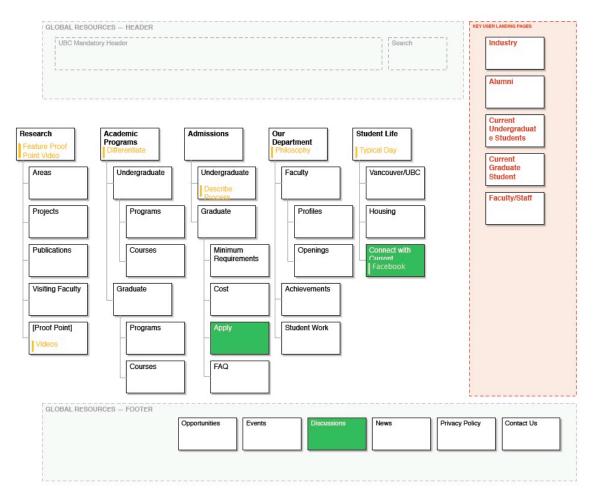
Both clients also indicated a need for better guidance in the development of content. While Grey normally includes content auditing and training in content entry in their scope of work, both projects had to overcome a number of hurdles to fully realize the content needs of the new website. It is evident that the identification of unique content categories early on in the IA development process is integral to its success, as these findings may greatly impact how the IA is handled.

Finally, working with the client, it is fundamental to identify as early as possible what the core concept is behind the website. Once this concept – the key idea and the primary purpose – is identified, the scope of the project can be clearly determined, allowing for the development of a functional IA. Grey was successful in helping Electrical and Computer Engineering program at UBC and Kelty Mental Health Resource Centre identify the primary purpose of their websites; however, it is important to stress how easily a project can become derailed due to the absence of a driving core concept. And if one thing is clear from the UBC ECE and Kelty projects, it's that the core concept is directly connected to the needs of key user groups.

Appendices

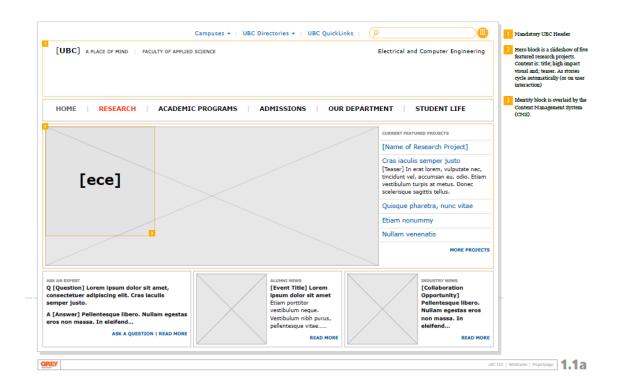
Appendix A

Grey Vancouver, UBC ECE Content Map, V2



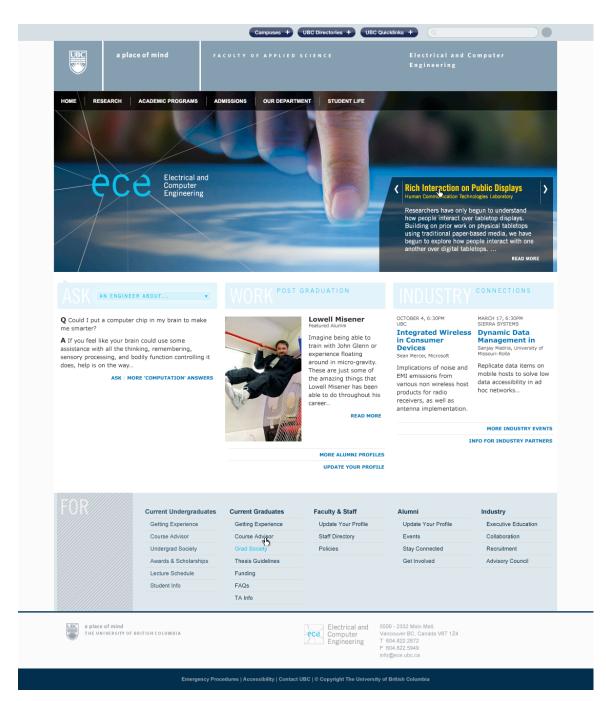
Appendix B

Grey Vancouver, UBC ECE Wireframes



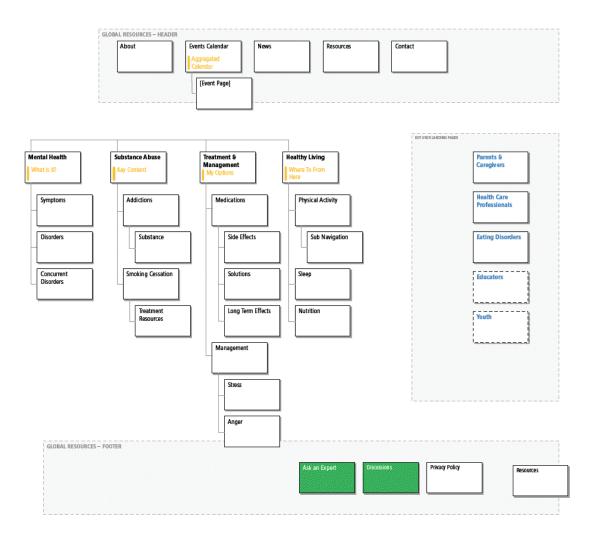
Appendix C

Grey Vancouver, UBC ECE Design Concept



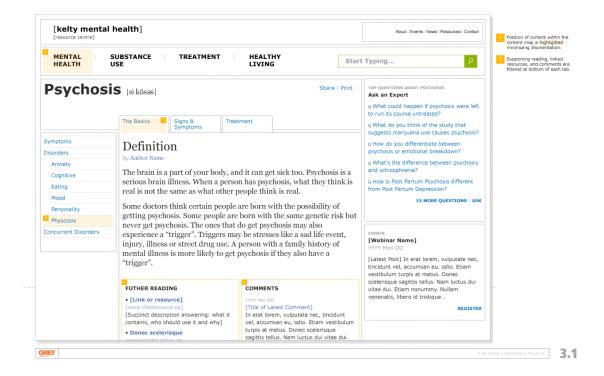
Appendix D

Grey Vancouver, Kelty Content Map V1



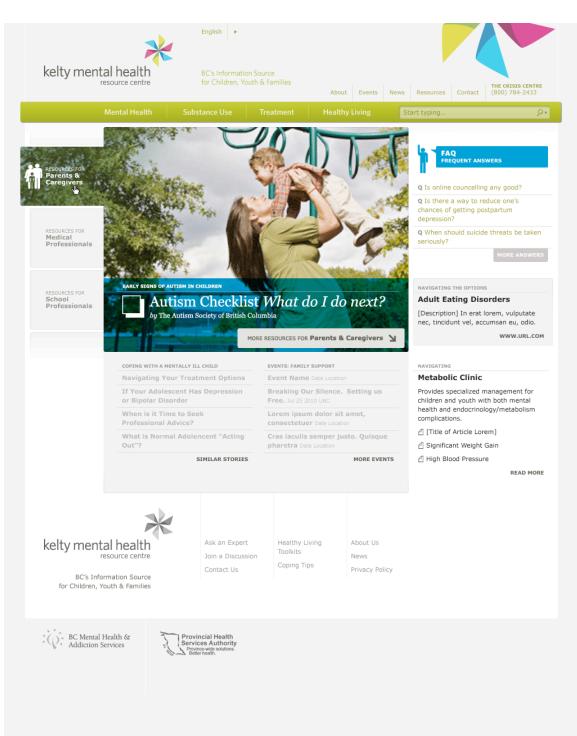
Appendix E

Grey Vancouver, Kelty Disorder Landing Page Wireframe



Appendix F

Grey Vancouver, Kelty Homepage Design Concept



Appendix G

Grey Vancouver, Kelty Finding Help Design Concept

kelty ment	Hom al health esource centre	English BC's Information Source for Children, Youth & Families About Events News Resources Contact (800) 784-2433			THE CRISIS CENTRE (800) 784-2433
	Mental Health S	Substance Use Treat	ment Healthy Livin	g Start typing	P٠
Getting Help Explore Your Options					
Getting Help	Emergency	Family Doctor (GP)	Specialized Care: About the Maples Adolescent Child and Youth Mental Health Program (Children's Hospital) Treatment Centre		
Medication	Non-Emergency	Child & Youth Mental Health (MCFD)			
Managment		Aboriginal Liason Worker	Maples Adole Jent Treatment Centre (12-17)	Inon-residential and outreach services to support youth, families and communities. Our main clients are troubled 12 to 17 year-old youth in the Province of British Columbia who have significant psychiatric and behavioural difficulties, as well as those youth found Not Criminally Responsible by Reason of a Mental Disorder or Unfit to Stand Trial. The Maples works with youth and families from an attachment based perspective. Attachment is part of every person's life – it is our bond with others, particularly those people we turn to when we are afraid or we need comfort. We all have attachment needs and when those needs are not being met or we are unable to verbally express what they are, we express them through our behaviour. Young people are more likely to do this than are adults. They may become aggressive or non-compliant, or they may simply withdraw.	
		School Teacher/ Counselor			
		Private Counselor/ Psychologist			
				р	ROGRAMS & SERVICES
				RESEARCH & EVALUATIONS	
					LOCATION
kelty mental health resource centre BC's Information Source for Children, Youth & Families		Join a Discussion	Healthy Living Abou Toolkits News Coping Tips Priva		
REC Children's Ment Health Project		Aental Health & T	Provincial Health Services Authority Sevices Authority Deter health	HOSPITAL	

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