



# ***communicating IA***

**Making the intangible more understandable**

Jackie Greenfield

# ***why it matters***

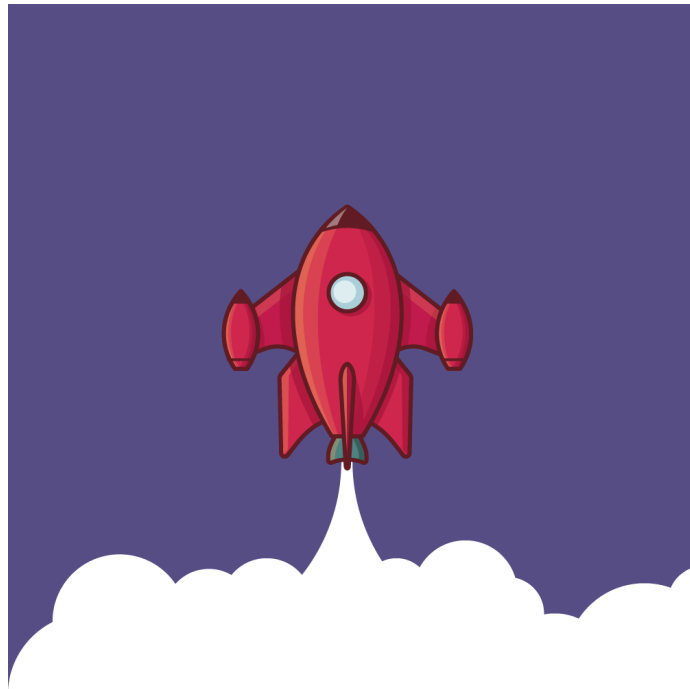
*“Getting the bones of the design right from the very beginning before diving into the user interface (UI) design will save an enormous amount of time, effort and money in the long run.”*

<https://blog.optimalworkshop.com/how-to-communicate-information-architecture-to-others/>



## ***why it matters***

- IA is the base of any site or app.
- If a key stakeholder doesn't give the right input at the right time, this can lead to failures down the line
- Similarly, if the team isn't aligned on what the IA is and how it will work, misunderstandings can lead to many problems



# ***the deliverable meeting***

# ORGANIZING INFORMATION IS NOT THE HARD PART

BUILDING TRUE CONSENSUS ON THE  
MEANING AND INTENT OF  
INFORMATION IS THE HARD(ER) PART

- Make Sense: Information Architecture for Everybody
- by Abby Covert
- [https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/33-20\\_ways\\_to\\_organize\\_a](https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/33-20_ways_to_organize_a)

*“For the information architect,  
communication is a special challenge  
because of the intangible nature of the  
work....*

*As an information architect, you face the  
daunting challenge of helping others  
visualize such abstract concepts as a  
metaphor-based architecture and  
indexing systems.”*

~Information Architecture for the World Wide Web, by  
Louis Rosenfeld and Peter Morville  
[https://docstore.mik.ua/oreilly/web2/infoarch/ch02\\_03.  
htm](https://docstore.mik.ua/oreilly/web2/infoarch/ch02_03.htm)



## ***the deliverable meeting***

1. Establish a purpose for the meeting
2. Set the context
3. Introduce the deliverable
4. Present the deliverable
5. (Post meeting) Share the deliverable



# ***establishing a purpose***

## ***the purpose***

For example: gain alignment on the organization of pages on our future website

Or: to discuss the proposed product taxonomy and metadata schema, and agree on next steps

Be sure to explain why this is an important step



# ***setting the context***

## ***context: what are we trying to do?***

Remind everyone of the overall project goals and previously aligned-on principles

### The Project Objectives:

- Create an experience that is more streamlined based on who is using the application and for what purpose
- Design a simplified, more enjoyable user interface that enables end users to perform tasks more accurately and quickly
- Enable the application to be more scalable so that it can easily accommodate ongoing change such as the addition of new product types over time
- Stay in budget and deliver the end result on time

### Key Principles:

- Simple
- Efficient
- Enjoyable
- Innovative

*“The work to create the design is as valuable as the design itself”*

<http://www.practicallyux.com/can-present-work-people-effectively/>



# context: inputs

- What went into this deliverable?
- Common answers may include:
  - Documented business/project goals
  - User insights & user goals
  - Current site structure
  - Competitors' site structure(s)
  - Recommended content based on a content analysis



## Onsite presence - grouping

The warranties and guarantees page features more than just warranties and guarantees. Upgrades, replacement plans and extended service plans don't fit under this heading.

### Restructure or Rename

- A restructure to two pages "Warranty" and "Services" could address this, which appears to be in the works.
- The use of an all-encompassing term, such as "Peace of Mind", would also make this more efficient and obvious to consumers.
- Ensure effective use of H1 tags accompanies any changes.

# context: outputs

- What will the deliverable inform?
- Common answers may include:
  - Wireframes
  - Site navigation
  - Site content
  - Filtering mechanisms

The screenshot shows a web application interface for 'Luna'. The top navigation bar includes a search bar and a 'Search' button. The main content area displays account details for 'Capmark Disbursing Agent' (Account 100463-010). The interface includes a sidebar with navigation links (Home, Dashboard, Account, Approve to Pay, Balancing, Comm. Mgmt, SWIFT, Admin) and a main content area with tabs for Contact, Holders & Payees, Distributions, Funds, Website, and Communication. A table lists contact information for various roles, including Relationship Manager, FastTrack Contact, and Authorized Confirmer. Annotations on the right side provide context for the interface elements.

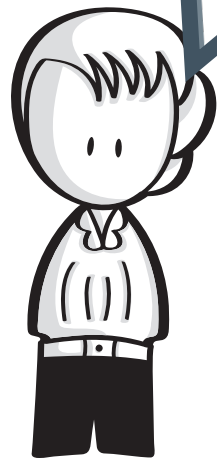
**Annotations:**

- Account Details:** The Account Details will display at the top of each Account sub page (Contacts, Holders & Payees, Disbursements, Funds, Website, & Communications). The Edit link (pencil icon) will open the Account Details overlay. Users can 'favorite' accounts by clicking on the star. The star changes to filled in for that case. Users can click again to remove the favorite.
- Sub Navigation:** The sub navigation will open a new page for each label. The recommended order and labels are as displayed. Website will include both Setup and Terminology. We recommend that the system remember the last page the user visited (like a cookie), and return the user to that page when selecting an account from the Account list page.
- Add Account Contact:** A single link will display to add a contact to this account. This

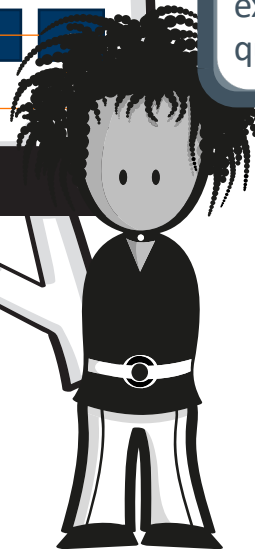
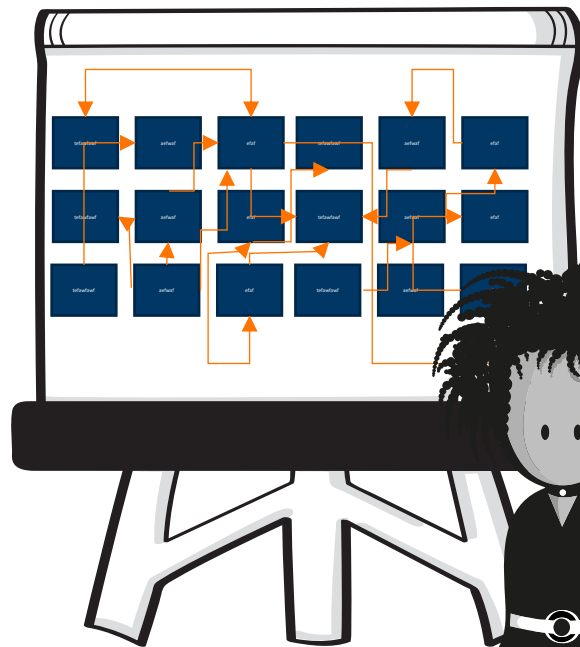
The navigation bar features a dark green background with white text. It includes a search bar with a magnifying glass icon and the text 'SEARCH'. Below the search bar, there are links for 'Bank', 'Borrow', 'Insure', 'Invest', 'Help Center', and 'Contact Us'. On the right side, there is a location pin icon with the text 'Top Niagara 14201 Change ZIP Code' and a 'Log In' button with a dropdown arrow.

# ***introducing IA deliverables***





WHOA! What is going on here? This looks like too much complexity. I don't like it.



Well, if you'll let me explain, it's really quite simple...

## ***intended purpose***

- Organization of the site/app
- Planning out future content
- Reviewing intended templates



## ***criteria by which this should be evaluated***

This is for audience xyz trying to do abc –  
will it work for them?



## *legend to explain diagrams*

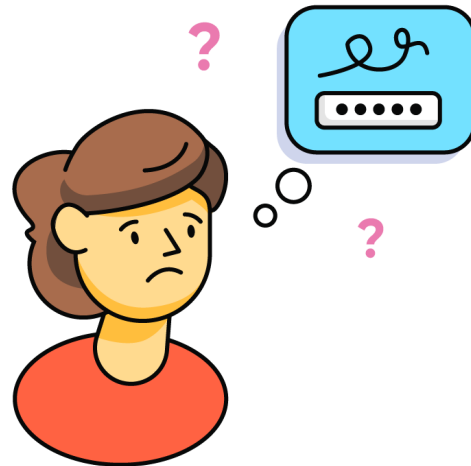
Show the legend upfront so your audience knows what to expect



<https://www.lucidchart.com/pages/examples/sitemap-generator>

## ***glossary of terms***

- Introduce unfamiliar terms
- Also introduce terms that may cause mis-alignment
- Use labels consistently throughout your presentation



# Sitemap

A sitemap is a visual diagram that illustrates the high-level organization of the site. It defines the site structure and creates a logical path for users to easily find what they are looking for.

When evaluating, the focus should be on the labels and the organization.

"Utility Navigation"



"Main Navigation"

## Legend

Utility Nav Item

Main Nav Item

Functionality

Functional or content notes

# Sitemap Introduction



## What is a Sitemap?

A sitemap is a visual diagram that illustrates the high-level organization of the site. It defines the site structure and creates a logical path for users to easily find what they are looking for.

It includes *every type* of page on the site, but not *every page*, i.e. every category and product are not listed out.

Please note that there is additional information about the content/data for the pages. The sign off will be on the organization of pages; there may still be some TBDs on content/data even after the sitemap is complete.

## Legend

Browse page

Account page

Cart/Checkout page

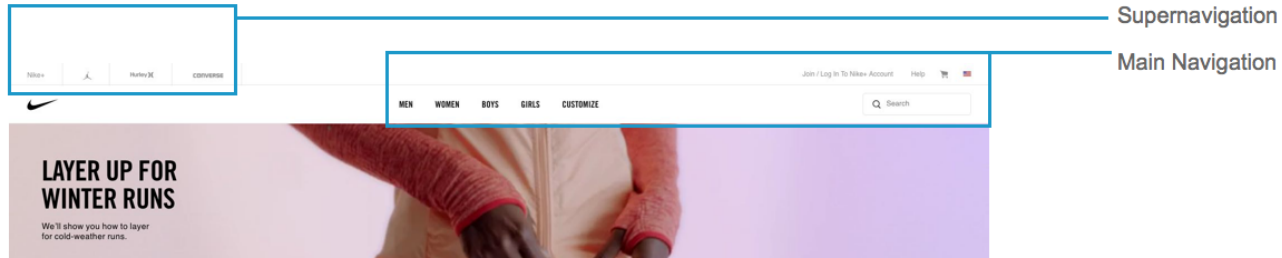
Content/Functionality on page

Off-site / 3rd party link or data

Indicates hierarchy

Indicates flow

## Supernavigation, Main Navigation, & Footer (Example: Nike.com)



## Taxonomy v1.1

### **Taxonomy Definition:**

A taxonomy presents Web content logically by grouping information into topics in an effort to create a positive navigation experience through intuitive organization and labeling.

Please note that the taxonomy is **not** set in stone.

We can adjust as we move into content creation based on specific SEO recommendations, product mix changes, or effort required.

This taxonomy is broken up across three tabs:

### **Product Taxonomy:**

Categories, subcategories, and product list labels. Based on current site analytics, suggested organization, a user test, and our expert recommendations

### **Education:**

Everything that will live in the new education section of the site. Includes a count of pages to revise, remove, or add.

### **Utility and Footer:**

Account, customer service, about us, etc. Includes a count of pages to revise, remove, or add.



## activity

Working with a partner, spend 6 minutes on this exercise.

Define these terms, then come up with a few of your own terms to define.

### defining terms



term	definition	example
page	Individual pages of the site, each having its own URL. May include static content and/or dynamic content.	home page, product detail page
template		
navigation		

# ***presenting IA deliverables***

## ***presenting IA to stakeholders***

### **don't**

- Narrate your deliverables and then ask for feedback

### **do**

- While presenting, gather rich input from your stakeholders and work closer to the goal together through collaboration

*“Depending on your project and your working style, it could be as simple as building the new IA out on a wall in Post-its or drawing it on a whiteboard wall where everyone can see it and ask questions and give their feedback. This can be really useful for communicating to people outside the team and is great for getting people together for a discussion.”*

<https://blog.optimalworkshop.com/how-to-communicate-information-architecture-to-others/>



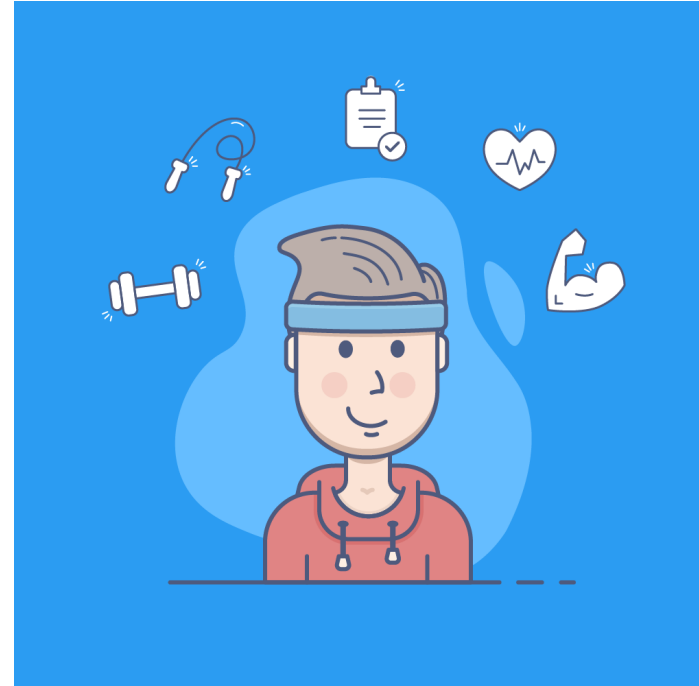
## ***assign roles***

Designate a note-taker before the meeting,  
and any other roles necessary



## ***conceptual introduction***

What's the unifying idea behind your deliverable?



## ***cover important landmarks***

Areas that represent the unifying concept,  
or areas of potential controversy



## ***ask questions***

- Does this seem like an intuitive organization of information, given our users' goals of xyz?
- Do you think these labels here will make sense to the users?
- Is there any content missing over there?



# ***designing IA deliverables for presentation***

*“A good site map has four attributes: it has good content, is easy to understand, uses the appropriate form, and is simple.”*

~ Donna Spencer in “Communicating Design: Developing Web Site Documentation for Design and Planning” by Dan Brown



*“The challenge to making a great site map is finding the balance between clarity and richness.”*

~ James Melzer in “Communicating Design: Developing Web Site Documentation for Design and Planning” by Dan Brown



# CLE at two “zoom” levels



Home

Category 1

Category 2

Category 3

Category 4

Category 5

Category 1

Subcat  
1a

Page A1

Page B1

Subcat  
1b

Page C1

Category 1

Category 2

Category 3

Category 4

Category 5

Subcat  
1a

Subcat  
2a

Page A3

Page A4

Subcat  
5a

Page A1

Page A2

Page B3

Page B4

Subcat  
5b

Page B1

Page B2

Page C3

Subcat  
1b

Page C2

Page D3

Page C1

Subcat  
2b

## ***projecting & contrast***

Make sure meaningful contrast is clear enough, especially if you'll be projecting;  
and/or ensure there's another way to understand the same info

Template  
Type A

Template  
Type B

Template  
Type C

Template  
Type B

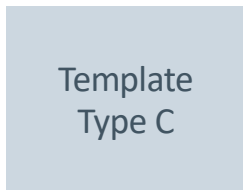
Template  
Type A



# colors

Consider using the company palette as a starting point

Using gradations of one color keeps it simple



<b>Navy Blue</b> (Trustworthy)  <b>PMS 2955C</b> #003865 R 0 G 56 B 101 C 100 M 60 Y 10 K 53		<b>Orange</b> (Innovative)  <b>PMS 2018C</b> #ff7500 R 255 G 117 B 0 C 0 M 58 Y 95 K 0			
80%					
60%					
40%					
20%					
<b>Light Blue</b> (Pragmatic)  <b>PMS 306C</b> #00B5E2 R 0 G 181 B 226 C 75 M 0 Y 5 K 0	<b>Kelly Green</b> (Genuine/Authentic)  <b>PMS 2402C</b> #009D85 R 0 G 157 B 133 C 96 M 0 Y 58 K 0	<b>Lime</b> (Passionate)  <b>PMS 2298C</b> #B7DB57 R 183 G 219 B 87 C 33 M 0 Y 72 K 0	<b>Yellow</b> (Passionate)  <b>PMS 1235C</b> #FFB81C R 255 G 184 B 28 C 0 M 31 Y 98 K 0	<b>Light Gray</b> (Pragmatic)  <b>PMS 7544C</b> #768692 R 118 G 134 B 146 C 35 M 14 Y 11 K 34	<b>Dark Gray</b> (Trustworthy-Pragmatic)  <b>PMS 7545C</b> #425563 R 66 G 85 B 99 C 58 M 32 Y 18 K 54
80%					
60%					
40%					
20%					

# ***“Complexity can get in the way of true understanding.”***

~ Make Sense: Information Architecture for Everybody.

[https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/14-Some\\_Enemies\\_that\\_lurk\\_in](https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/14-Some_Enemies_that_lurk_in)



# *layers of information*

## 1. Must-haves

- Relationships between pages (and/or templates)

## 2. Elaborating Pages & Links

- Page details and distinctions
- Grouping pages
- Additional connections

## 3. Further context

- Project management and planning
- Editorial and content strategy
- User needs
- etc.

~ “Communicating Design: Developing Web Site Documentation for Design and Planning” by Dan Brown

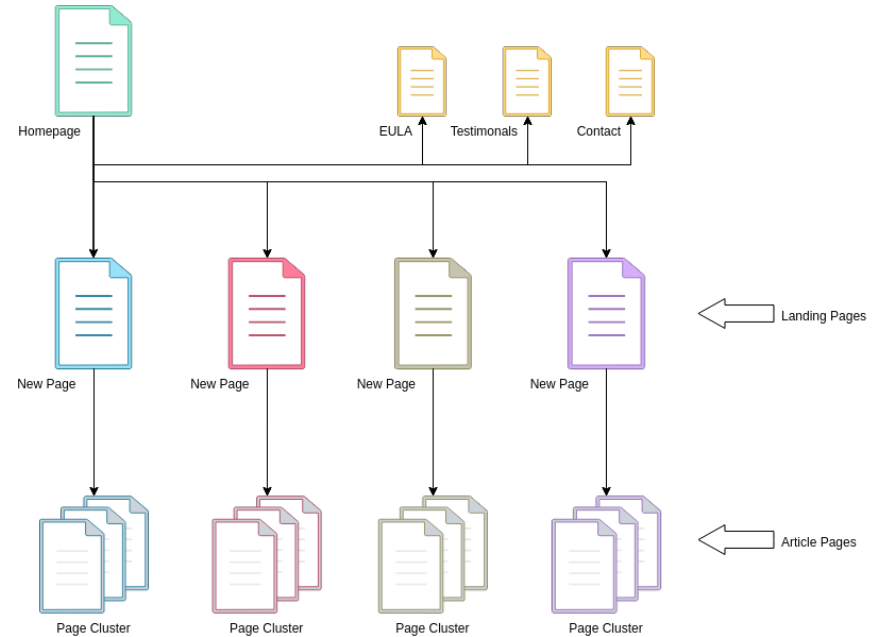
*“The most effective way to develop a visual language for your site map is to make a list of everything you need to describe in the diagram. After prioritizing the list, you can identify how to represent each kind of information.”*

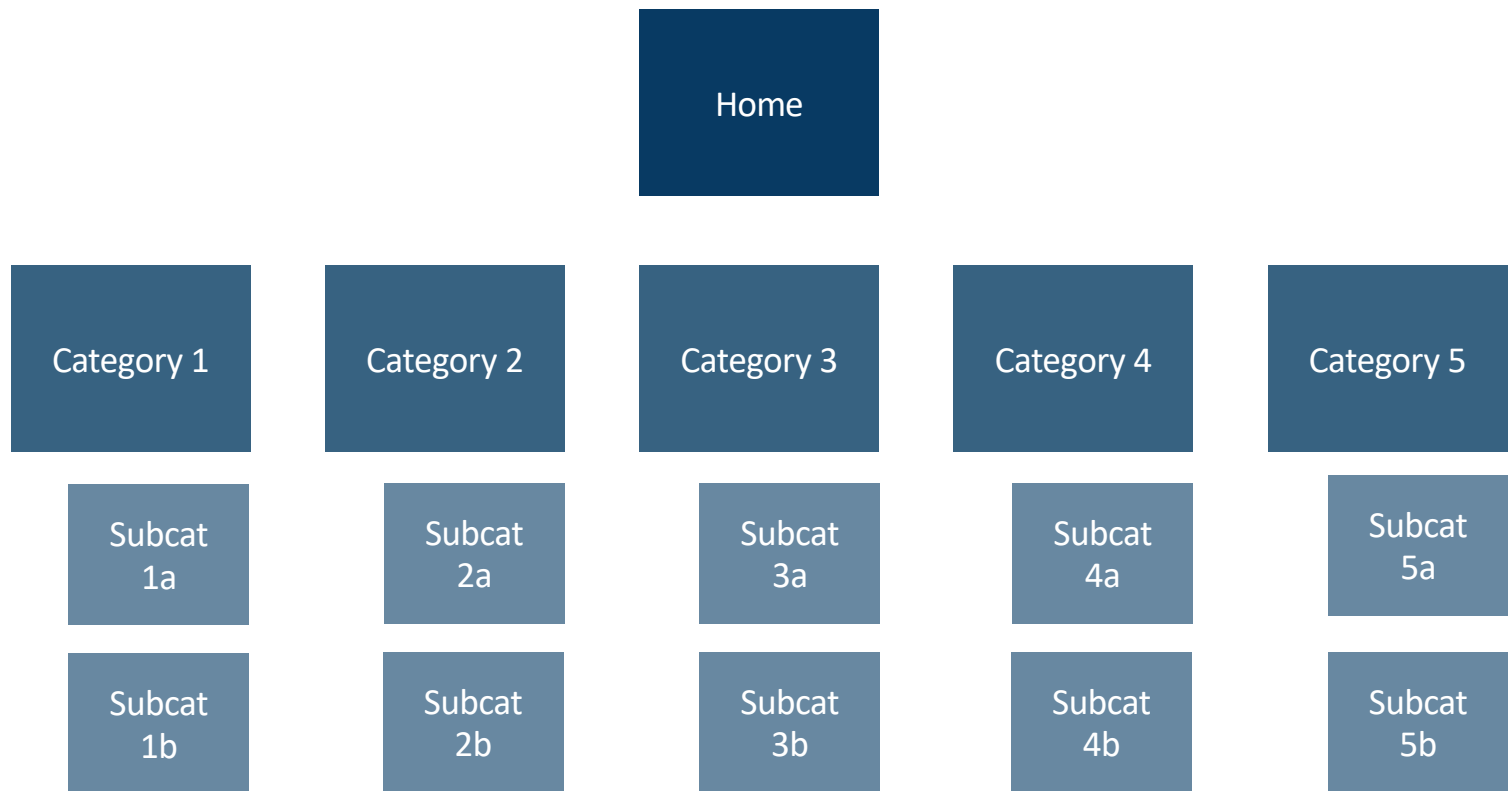
~ “Communicating Design: Developing Web Site Documentation for Design and Planning” by Dan Brown

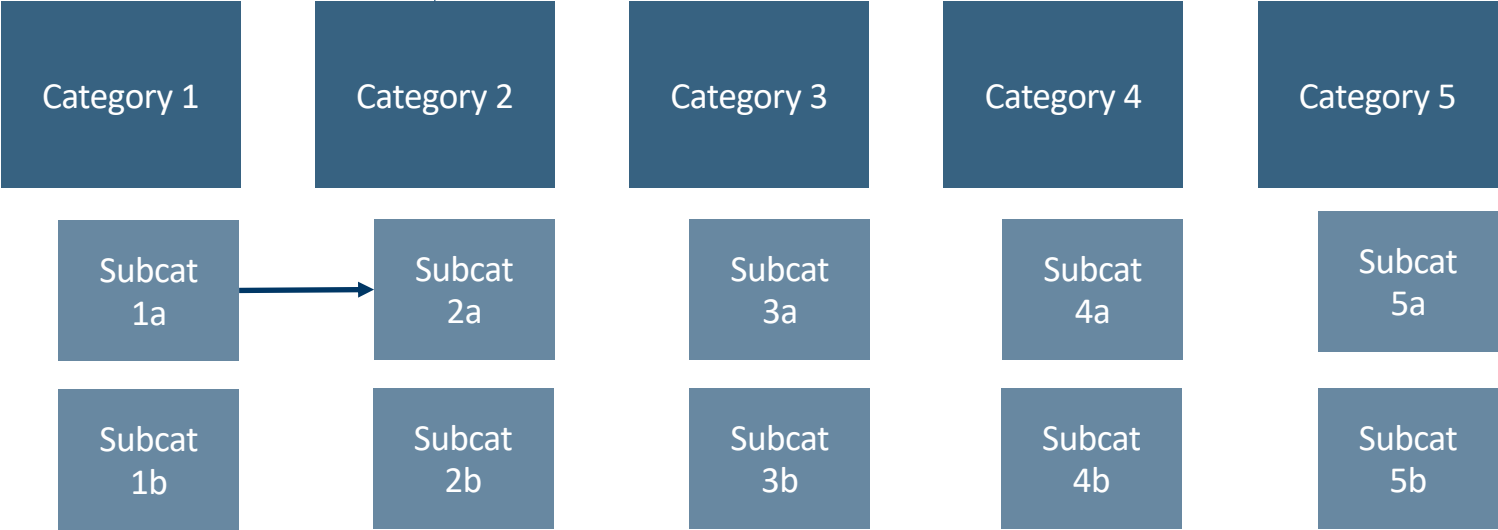
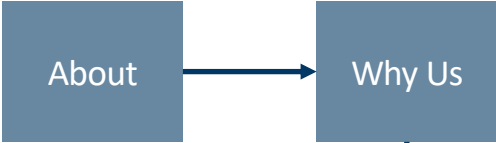


# *common ways of visualizing information*

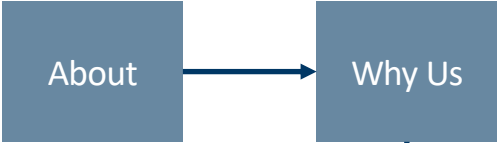
- Color
- Size
- Shape
- Stacked shapes
- Icons
- Text







Utility Nav

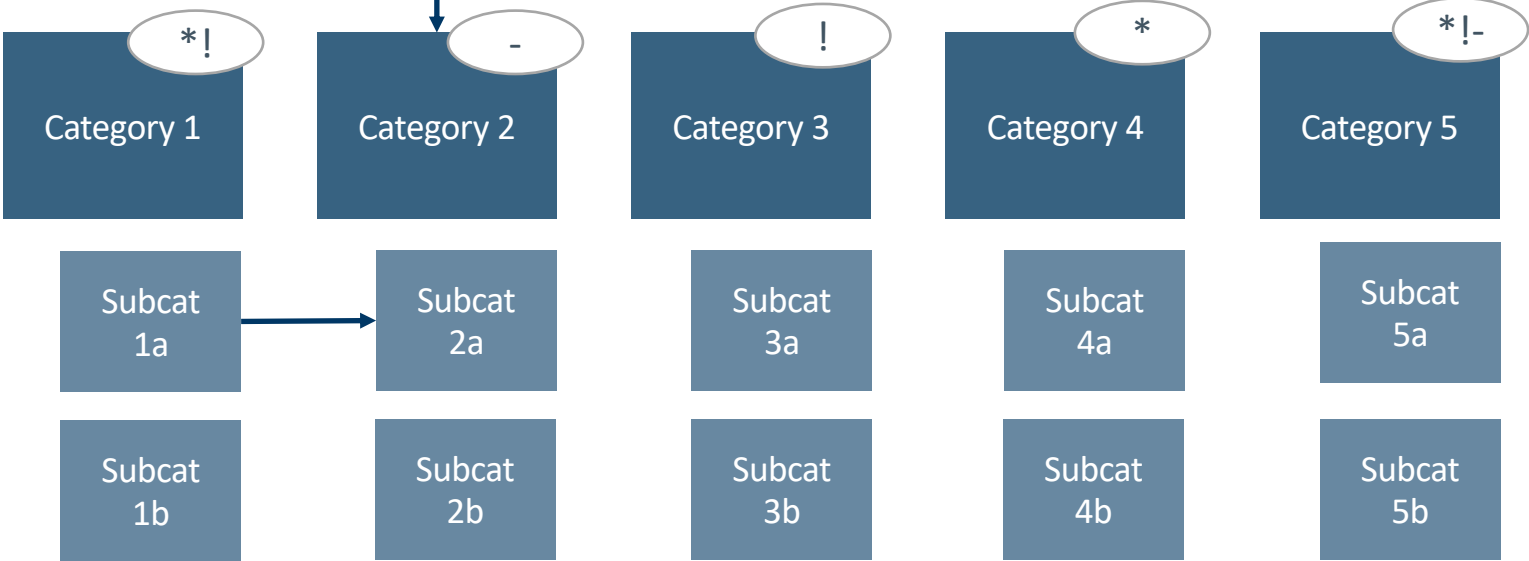


\* Persona A  
! Persona B  
- Persona C



Home

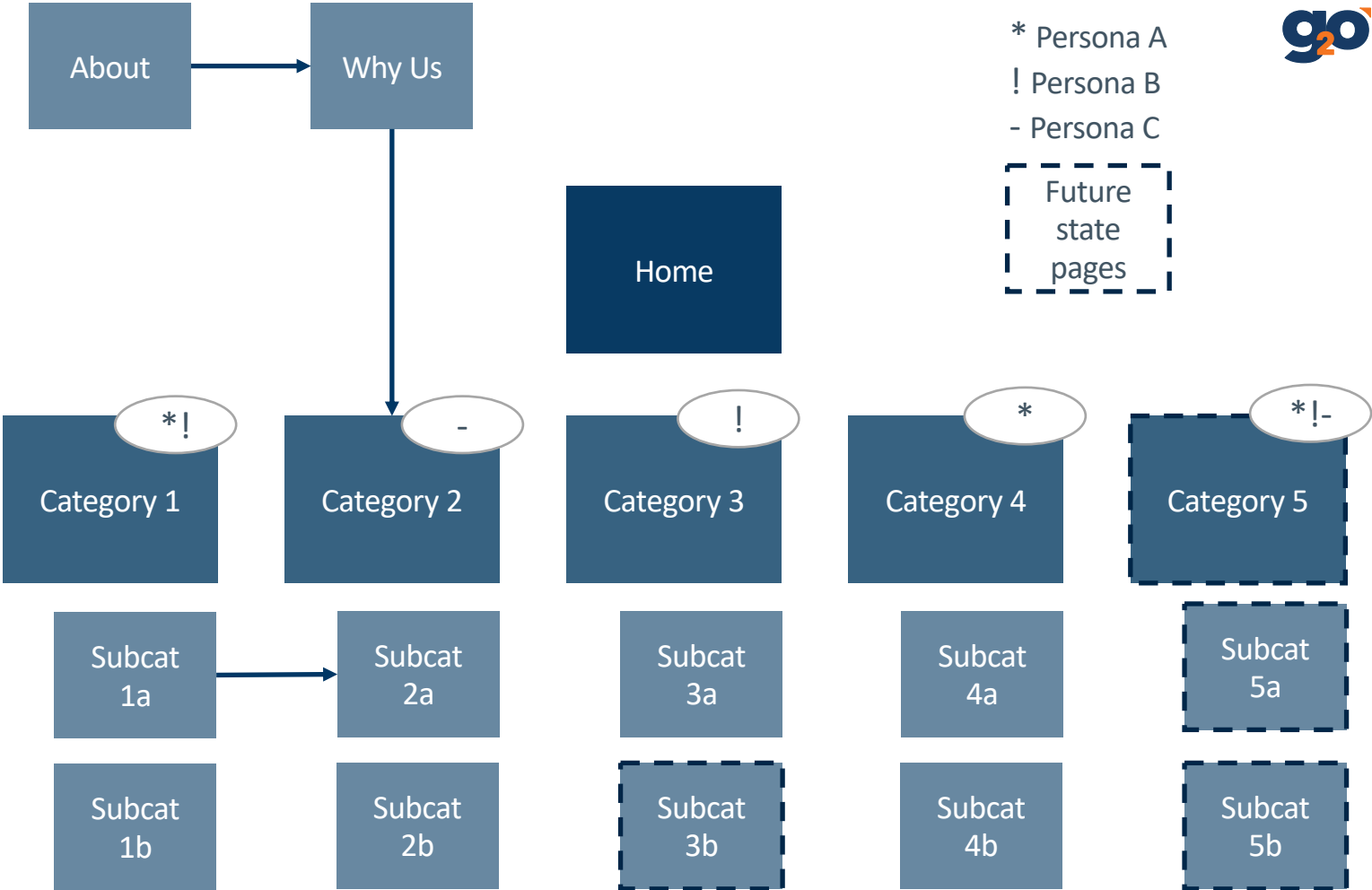
Global Nav





\* Persona A  
! Persona B  
- Persona C

Future  
state  
pages



Level 1	Level 2	Level 3	Current URL	Notes	Remove, New, Revise
Education			<a href="http://www.site.com/education">http://www.site.com/education</a>	Visible in footer	Revise
Education	Topic 1		<a href="http://www.site.com/education/topic1">http://www.site.com/education/topic1</a>	Visible in footer	Revise
Education	Topic 1	Topic 1a	<a href="http://www.site.com/education/topic1/topic1a">http://www.site.com/education/topic1/topic1a</a>	Renamed to Topic1a based on user feedback. Selection Videos lives here Visible in footer	Revise
Education	Topic 1	Topic 1b	<a href="http://www.site.com/education/topic1/topic1b">http://www.site.com/education/topic1/topic1b</a>	Recommend adding imagery	Revise
Education	Topic 1	Topic 1c	<a href="http://www.site.com/education/topic1/topic1c">http://www.site.com/education/topic1/topic1c</a>	Recommend reworking copy; add imagery	Revise
Education	Topic 1	Topic 1d	<a href="http://www.site.com/education/topic1/topic1d">http://www.site.com/education/topic1/topic1d</a>	Recommend adding imagery	Revise
Education	Topic 1	Topic 1d	<a href="http://www.site.com/education/topic1/topic1d">http://www.site.com/education/topic1/topic1d</a>	Recommend adding imagery	Revise
Education	Topic 1	Topic 1e	<a href="http://www.site.com/education/topic1/topic1e">http://www.site.com/education/topic1/topic1e</a>	Remove; poor content, minimal value	Remove
Education	Topic 1	Topic1f		Recommended New	New

# ***sharing IA deliverables***

## ***check your sharing experience***

- Look at the sharing experience in another browser
- Ask someone else to check it out, especially with a different OS or monitor
- This is good both as QA, but also to see if you need to explain anything when you share it, like how to navigate the sharing experience

## *let them navigate*

This taxonomy is broken up across three tabs:

### Product Taxonomy:

Categories, subcategories, and product list labels. Based on current site analytics, suggested organization, a user test, and our expert recommendations

### Education:

Everything that will live in the new education section of the site. Includes a count of pages to revise, remove, or add.

### Utility and Footer:

Account, customer service, about us, etc. Includes a count of pages to revise, remove, or add.

Home

Category 1

Category 2

Category 3

Category 4

Category 5

# ***conclusion***

## ***the deliverable meeting***

1. Establish a purpose for the meeting
2. Set the context
3. Introduce the deliverable
4. Present the deliverable
5. (Post meeting) Share the deliverable



# Presenting for Impact

## A Guide to Presenting Information Architecture to Stakeholders

by Gail Swanson



### SET THE CONTEXT

Your audience hasn't been swimming in the details of your work like you have. Get everyone warmed up and focused by sharing how the information architecture contributes to business goals and ties to other efforts.

- Use provisional goals if none have been defined
- Connect using familiar language
- Confirm where you are in the process
- Indicate what input you need from stakeholders this time



### FOCUS ON IDEAS

To create a common understanding of the information space you've designed, begin building a mental model for stakeholders. Help everyone understand the sum of all the parts.

- Provide simplified models
- Describe the experience and *then* the information architecture that generates it
- Share your process and explorations
- Use design rationale to tell the story rather than as defense of an idea



### GUIDE ATTENTION

Explain the right details, not every detail. Direct your stakeholder's attention to areas that drive decisions and build understanding. Let them know what you need them to react to and the level of granularity they should focus on.

- Paint the big picture before focusing in on an area of detail
- Break the discussion into chunks to prevent information overload
- If now isn't the time to comment on details, let them know when they will have that opportunity.



### BRING IT TO LIFE

Deliverables are the artifacts, not the story. Use simplified diagrams or models to build common understanding. Avoid narrating your sitemaps and userflows, leaving your audience to interpret their meaning.

- Create a presentation deck for the discussion and provide deliverables later for reference
- Use simplified diagrams or models as powerful tools
- Show examples of similar techniques in the wild



### ENGAGE

Stakeholder presentations significantly impact projects. Set yourself up for success by using public speaking techniques to command the room. Physical cues such as standing up and confident body language give your work gravitas.

- Stand up or position yourself at the head of the room
- Focus on the conversation. Have someone else take notes
- Be an active listener. Probe for understanding before reacting
- Facilitate the conversation



### PRESENTATION CHECKLIST

1. Architect the conversation
2. Prepare for logistic failures
3. Designate a note taker and other team roles
4. Set the meeting goal and communicate expectations
5. Practice your talking points
6. Present clearly, with authenticity
7. Listen to the audience
8. Probe for understanding
9. Summarize decisions and action items

## resources

- [https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/14-Some\\_Enemies\\_that\\_lurk\\_in](https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/14-Some_Enemies_that_lurk_in)
- [https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/33-20\\_ways\\_to\\_organize\\_a](https://www.slideshare.net/AbbyCovert/make-sense-information-architecture-for-everybody/33-20_ways_to_organize_a)
- <https://blog.optimalworkshop.com/how-to-communicate-information-architecture-to-others/>
- <http://www.practicallyux.com/can-present-work-people-effectively/>
- <https://www.lucidchart.com/pages/examples/sitemap-generator>
- <http://www.practicallyux.com/presenting-for-impact-a-guide-to-presenting-information-architecture-to-stakeholders/>
- <https://i1.wp.com/www.practicallyux.com/wp-content/uploads/2015/04/PresentingIAtoStakeholders.png>
- ["Information Architecture for the World Wide Web"](#) by Louis Rosenfeld and Peter Morville
- <https://illustrations.co>
- "Communicating Design: Developing Web Site Documentation for Design and Planning" by Dan Brown



***Questions? Comments?***



# ***Thank you!***

Please contact me with questions/feedback:

[jackie.greenfield@g2o.com](mailto:jackie.greenfield@g2o.com)