Shifting towards a task-based IA

Our story

World IA Day – Ottawa

February 18, 2017

What is a task?

Something a person "wants" to complete through services or information you offer.

How do I file my taxes?

How many hours do I need for a PPL?

What do I need to start a business?

Canada.ca task model

- Identified top 100 tasks offered by the Government of Canada
- Grouped them into themes and topics
- Created a Topic Tree
- Setup a weekly meeting with theme lead departments

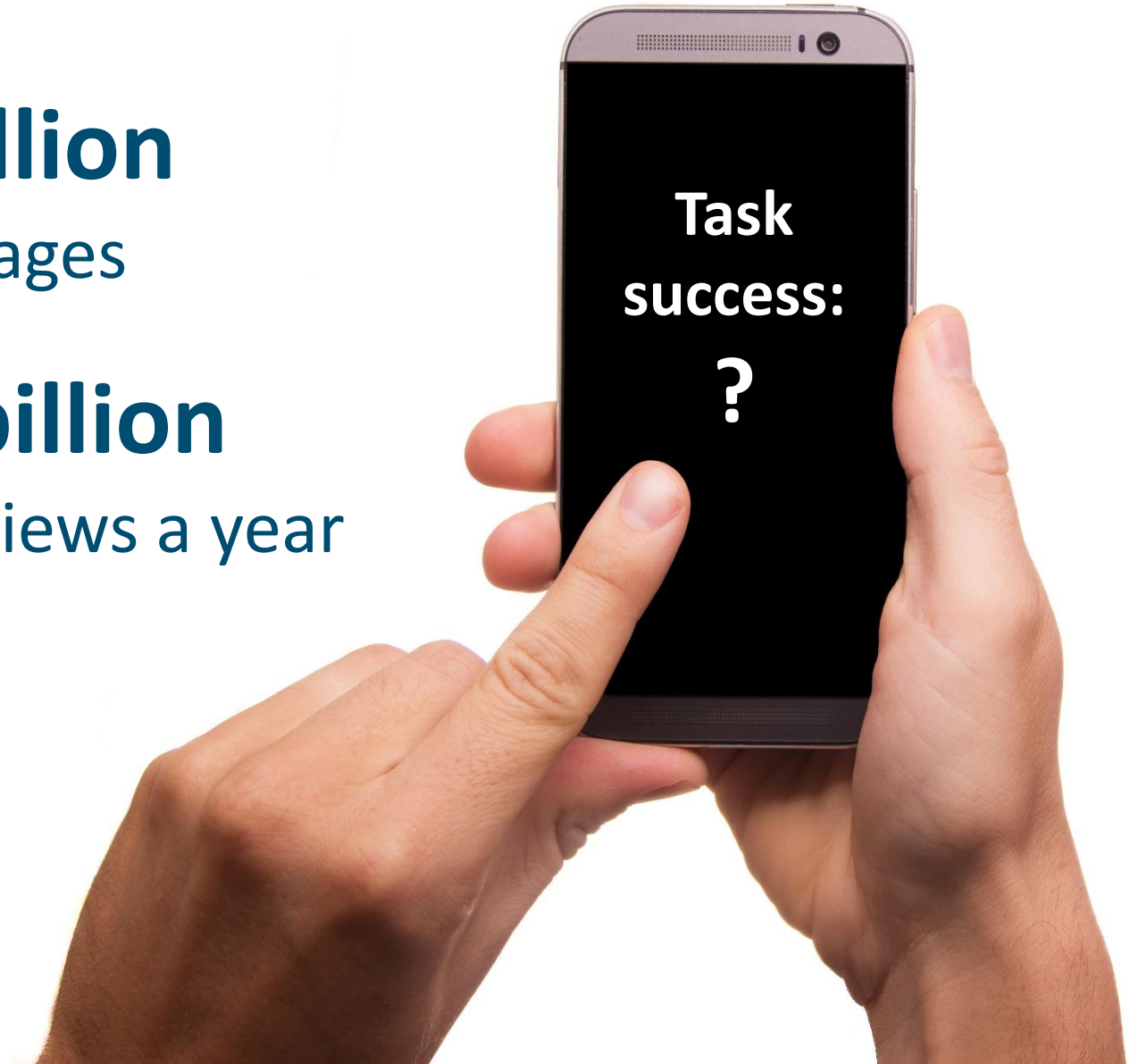
Canada.ca

Français
Government of Canada
Gouvernement du Canada
Search Canada.ca
Jobs
Immigration
Travel
Business
Benefits
Health
Taxes
More services
CANADA 150
CANADA 150
Enjoy free admission to Parks Canada places in 2017
Pause
Most requested services and information
Get quick, easy access to the Government of Canada's most requested services and information.

The Challenge

4 million
web pages

1.4 billion
page views a year



Our goals

1. Shift the mindset

- Publish less, and improve what we have
- Use the same layouts and IA for key pages
- Write content people will understand
- Bring evidence into every decision

Our goals

2. Deliver improvements ASAP

- Why wait when we know something is going to help?
- Gain real-world metrics on findability and usability to help everyone improve
- Encourage others to follow

Shifting the mindset

Making a case for rules

Public Servants
>250,000

Delivering
1000s services

Need for
Consistency

Need for
Plain language

For everyone's benefit

Start discussions

Create
Rules as content and IA tools

Typical rule-makers

Out of touch

Insulated

Unreasonable

Unrealistic

Pretentious

Good rule-makers

Humble

Prepared to be wrong

Trust the people who will use the rules

Attract outside talent

Collaborative

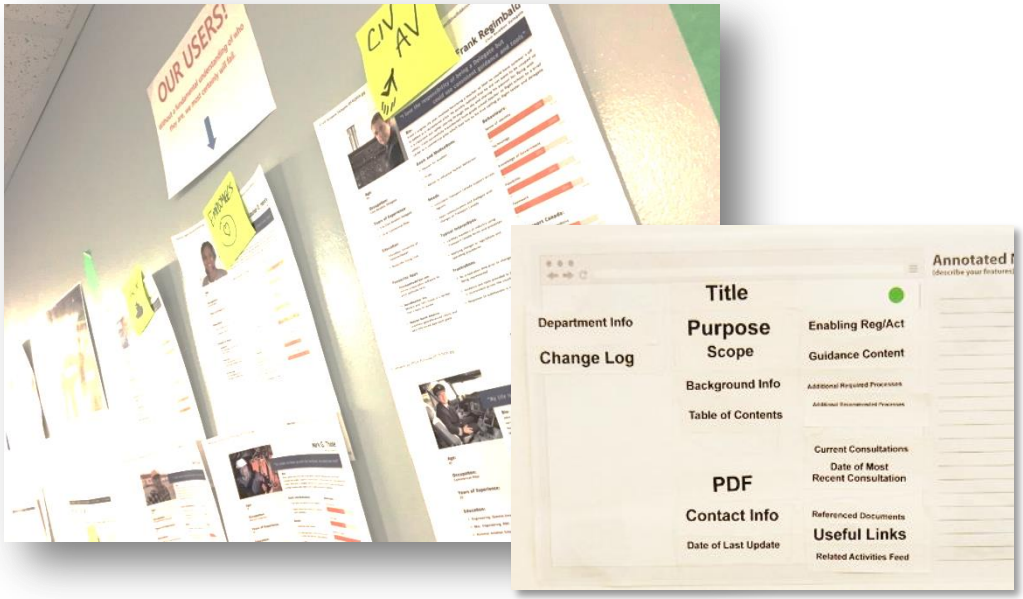
Continuously improve

Co-designed the rules

- We'd get the ball rolling on an approach
- Hand off to a skilled department or group
- Tested the approach
- Integrated it into rules (to everyone's benefit)

Encourage experimentation

- Openly shared designs and IA approaches
- No one got in “trouble”
- Tested the approach
- Integrated it into rules (to everyone’s benefit)



Examples of rules

2.9 Measure your content for readability

Writing for readability is important when developing content for Canada.ca.

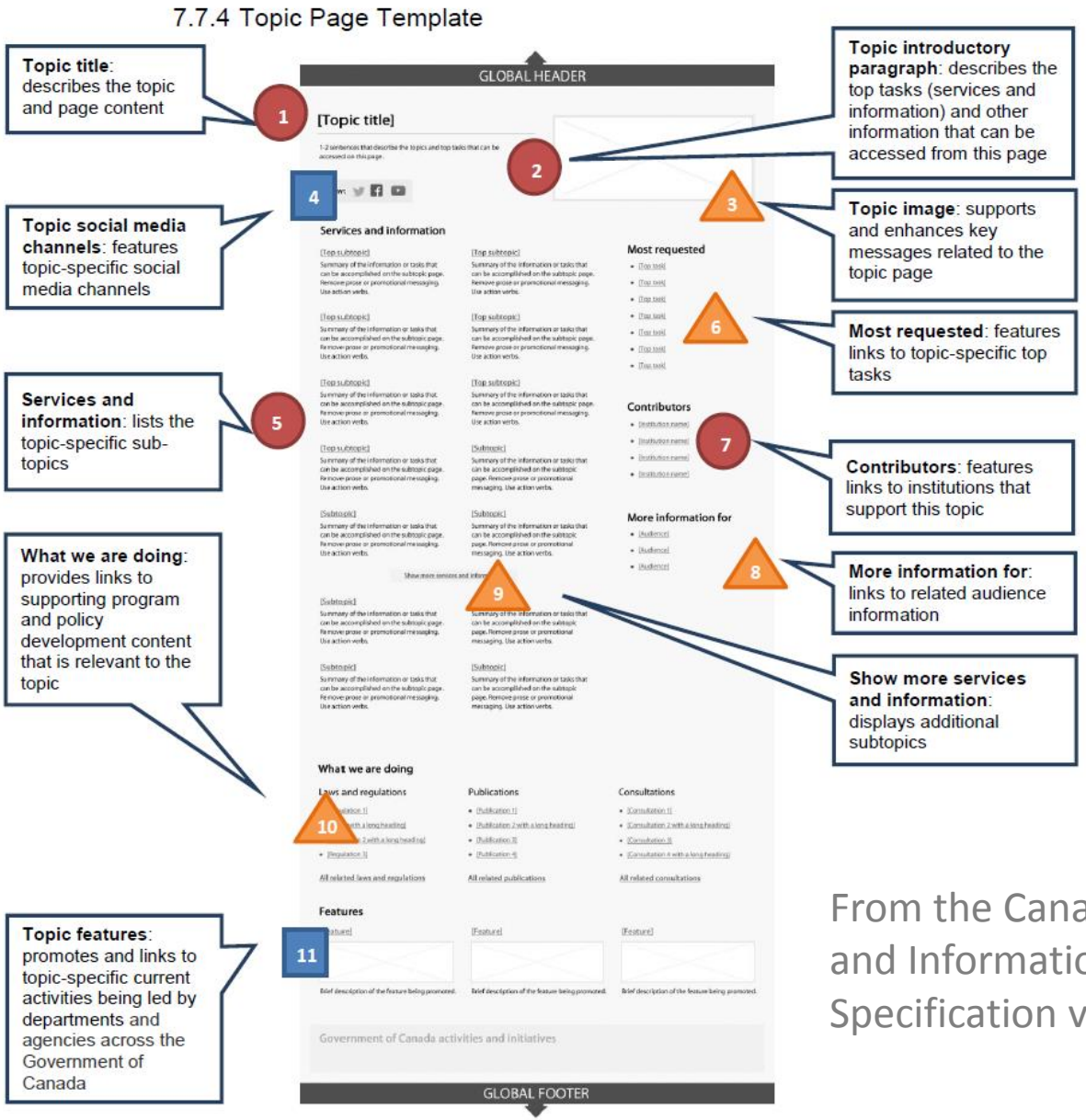
To gauge readability, evaluate the reading level of content that supports your top tasks as follows:

- navigation content (home, theme and topic pages), destination content and text appearing in web applications for general population audiences: target Grade 6 to 8
- specialist content, including web applications designed for specialist audiences: institutions must determine the appropriate grade level and apply this level across all content

To assess if your content meets the requirements for readability, you can use Word's free Flesch-Kincaid tool.

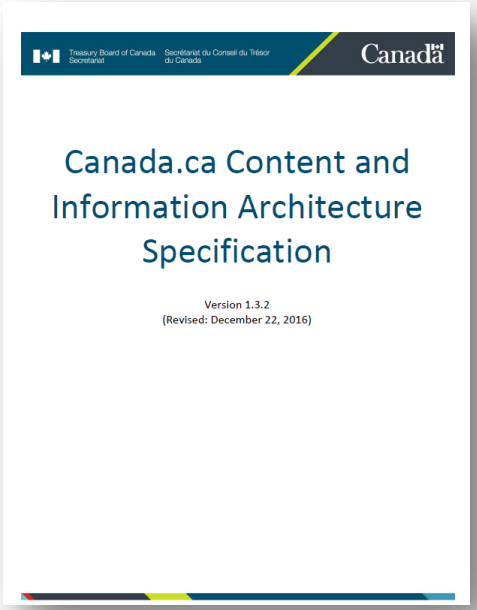
From the Canada.ca Content Style Guide v2.0

Examples of rules

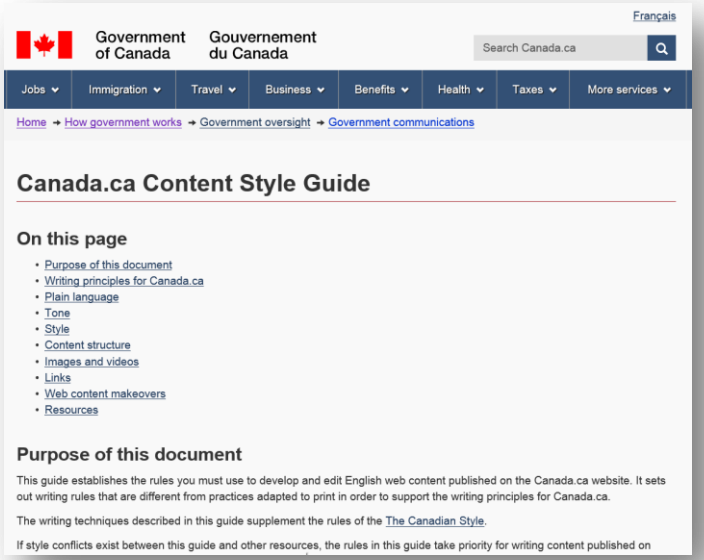


From the Canada.ca Content and Information Architecture Specification v1.3.2

The result



Our design manual



Our style guide

- Rules for an entire enterprise can use as tools to improve their content
- A testing habit
- Mechanisms to continuously improve

Delivering improvements

Targeted pilots

Optimization projects: improving existing digital services for citizens

- Small teams working in a short timeframe
- Doing a single cycle of test-and-improve
- Focusing on specific aspects of high-demand online services
    - Typically the “getting started” tasks, like understanding eligibility criteria or meeting prerequisites
- Using processes derived from Design Sprints and Top Task Management
    - Starting from a baseline usability test
    - Measuring task findability, task completion and time on task

The actors – multidisciplinary teams

Digital Content Design

Program/Policy Expertise

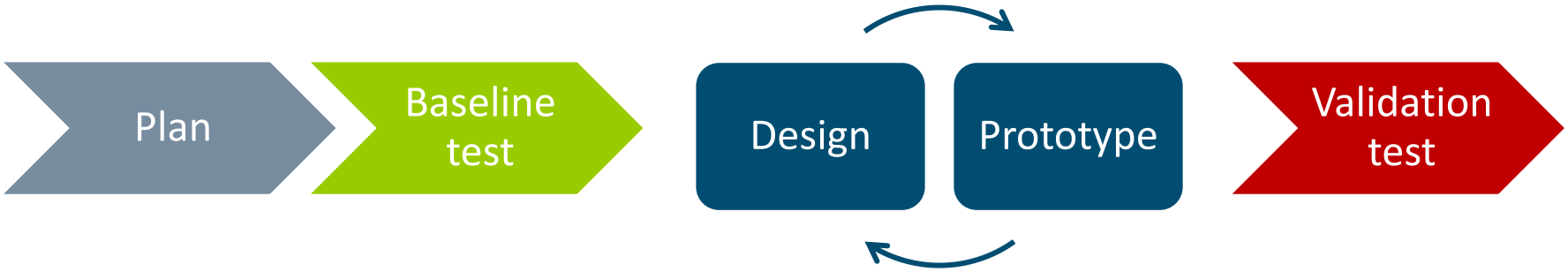
Usability Research

Prototyping

Project Management

The Process

Timeframe: 3-4 months



Identify core tasks and develop scenarios

Capture and analyze baseline task data for live content

Re-organize/re-work content to solve task issues

Capture and analyze task data for prototype

Case study – “Starting a business” pilot

Minimal investment, solid return

- **Duration:** Oct 2016 – Jan 2017 (3.5 months)
- **Project team:** 9 team members from TBS, ISED and CRA
  - Plus 3 consultants to design & run tests, analyze data and recommend solutions
- **Optimization target:**
  - +15% task success and findability rates
  - Overall reduction in time-on-task
- **Product outcome**: prototypes ready for integration into production environment
  - Flatter IA structures,
  - Clearer and simpler content
  - Improved design patterns – adopting and extending TBS guidance

Planning – task ID

Task Title	Scenario	Success Requirement
1. Legal steps	Imagine you are going to start a home business in Winnipeg, part-time as a consultant. Find out what you can find out about any essential legal steps in that process.	Find at least 1 essential legal step: register, choose a unique name, register for business number, incorporate, get permit
2. Name your Business	You want to name your new business 'SOMOS'. Check if it is legal or illegal for you to start using that name.	Use of name illegal - SOMOS already registered
3. Incorporate	You have decided to incorporate your business. Is it possible to submit the application form online, and if so, how much it will cost?	Yes - $200 to file online
4. Charge GST	You expect to earn about $1,000 a month from your new business for the first six months. Find out (yes or no) whether you must charge GST to your customers.	No
5. GST Account	Your business needs to start collecting GST. Find the official first step you must take.	Register for Business number and GST account - Register online button in English or French equivalent
6. Pay employee	Your first employee starts work next month. Find out (yes/no) if there is an official step you must take before or very soon after you cut their first paycheque.	Yes –register for a payroll account CRA

Usability testing

Combine new approaches with established methods

Moderated

- Proven methodology for behavioural research
- Deep insights into issues with task findability and completion
- Expensive, difficult to scale

Unmoderated, online

- Online testing tools rapidly evolving
- Promising for benchmarking, pilot testing
- Low cost, scalable

"Starting a business" participants

- Business students (20s)
- Mature adults (40s, 50s)
- Most new to starting a business
- Baseline testing: n=12
- Validation testing: n=34

Key consideration: test design, analysis of data/evidence requires expertise

Design/Prototyping

The path of least resistance

Aligned to GC toolset: GitHub

- Used for Web Experience Toolkit
- Outputs HTML, easy integration into production environments – or other prototypes
- Manageable learning curve

Collapsed traditional silos between content, design and coding, via:

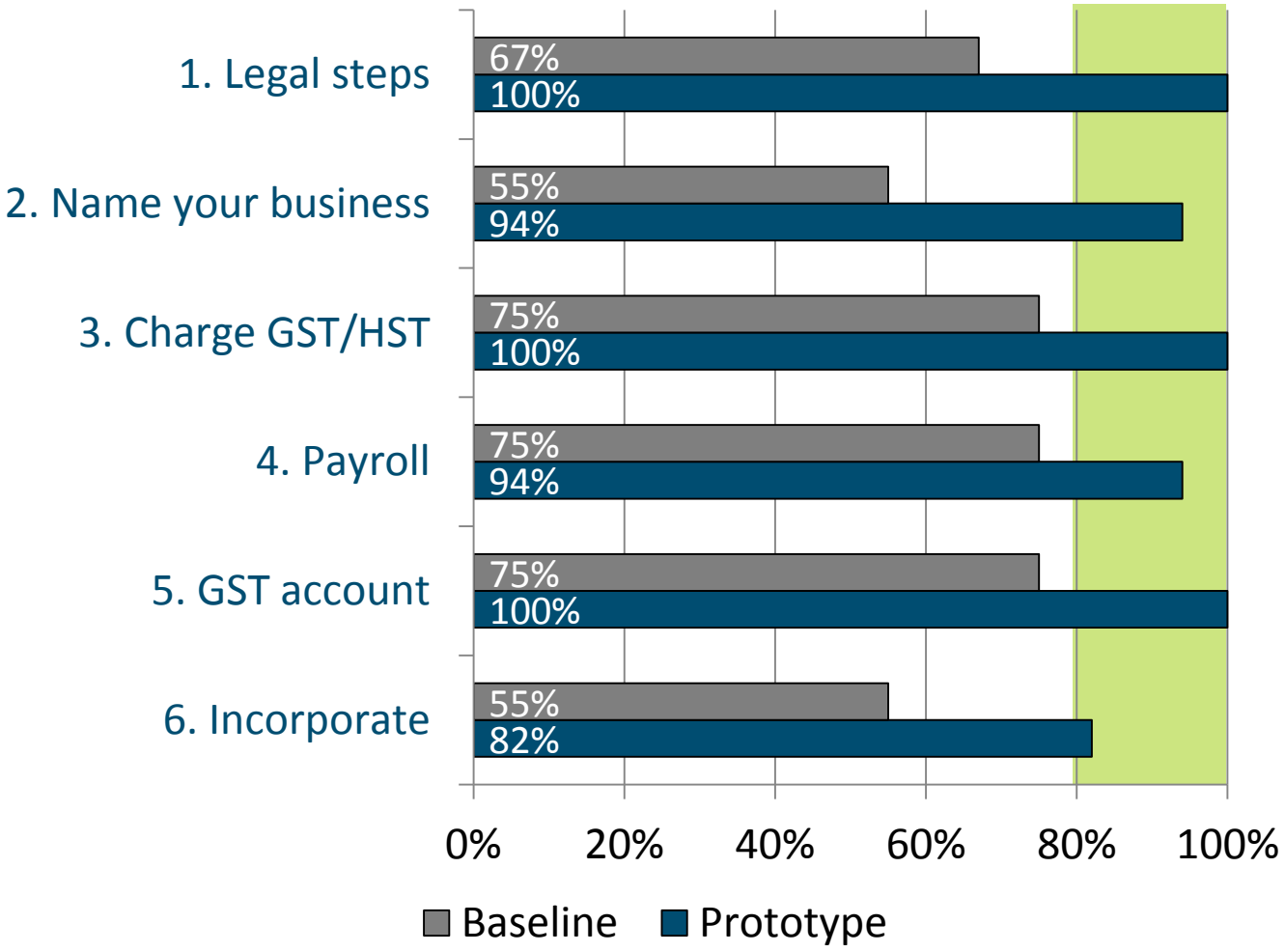
- Weekly design meetings
- Working in pairs

"Starting a business" prototyping

- **58 pages**
- **8 contributors**
- **600+ edits**

- Nearly all team members contributed "commits"
- Most had never used GitHub before

Task findability – before and after

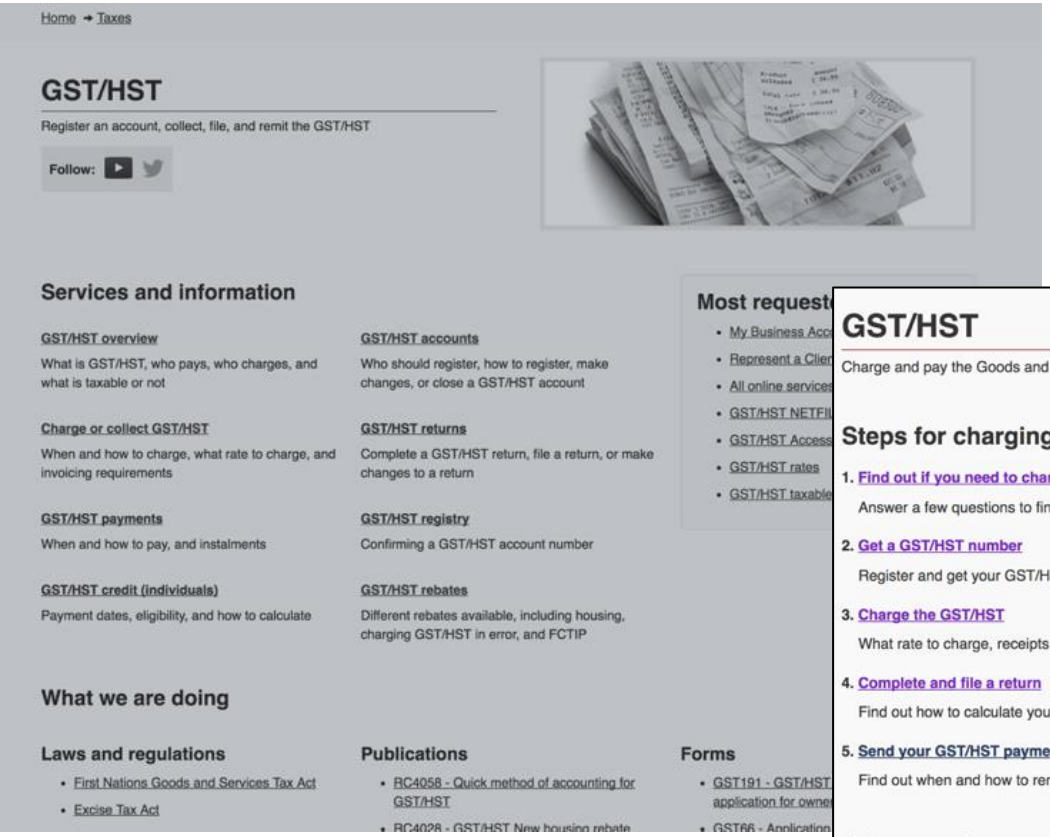


+28%

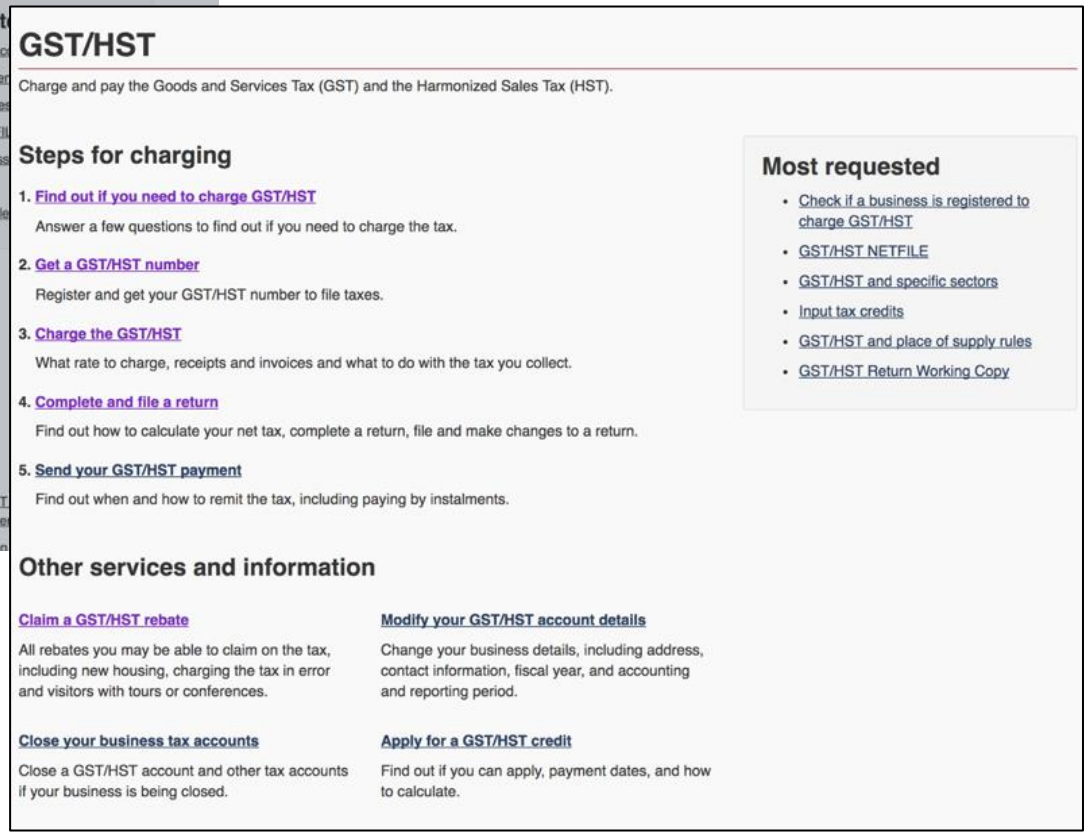
Improved **Task Findability** rate

Example – step-by-step pattern

Before – topic page pattern

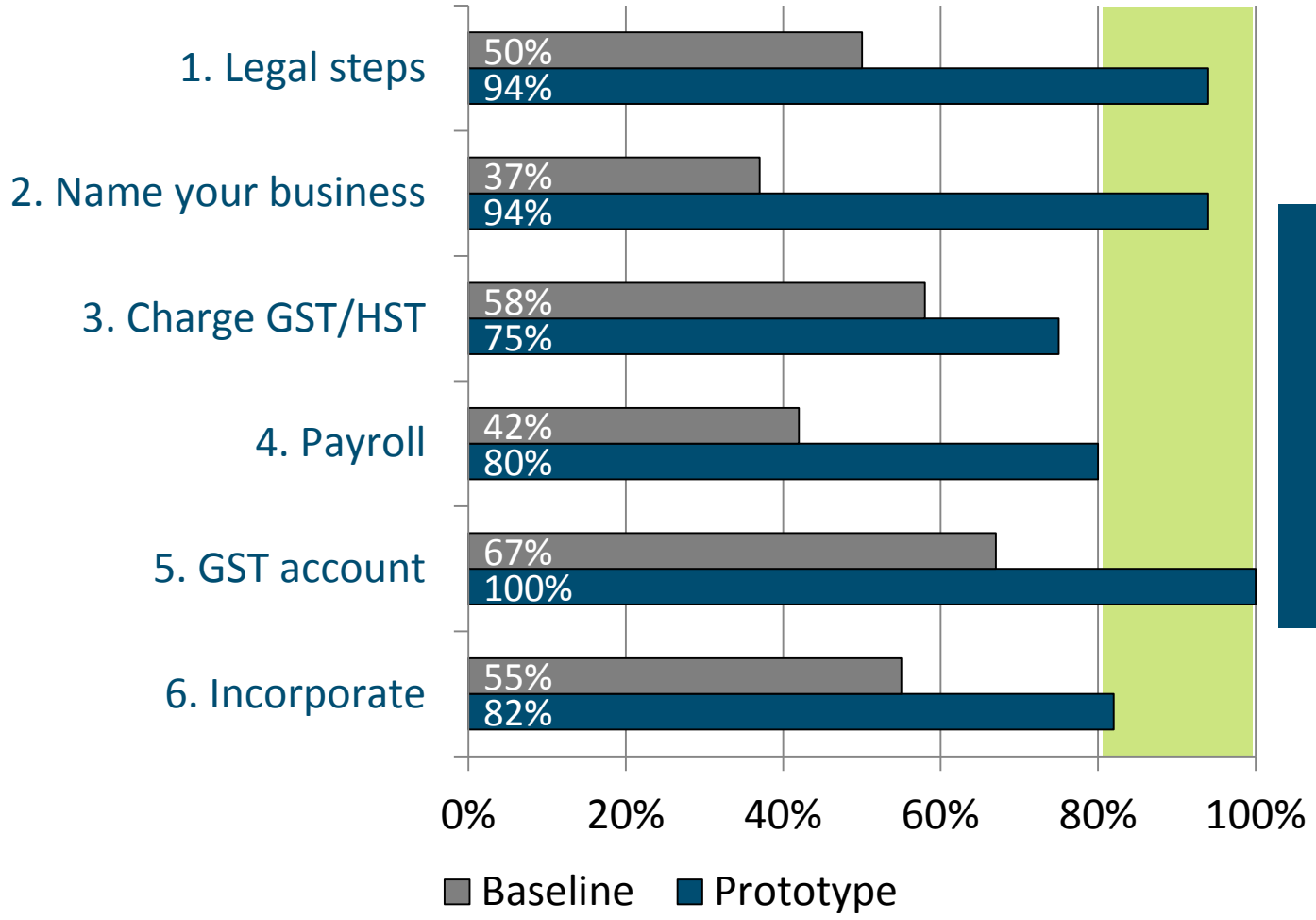


After – vertical steps pattern with action-oriented links



Action oriented links (Get a GST/HST number) were much more effective than noun oriented links (GST/HST accounts)

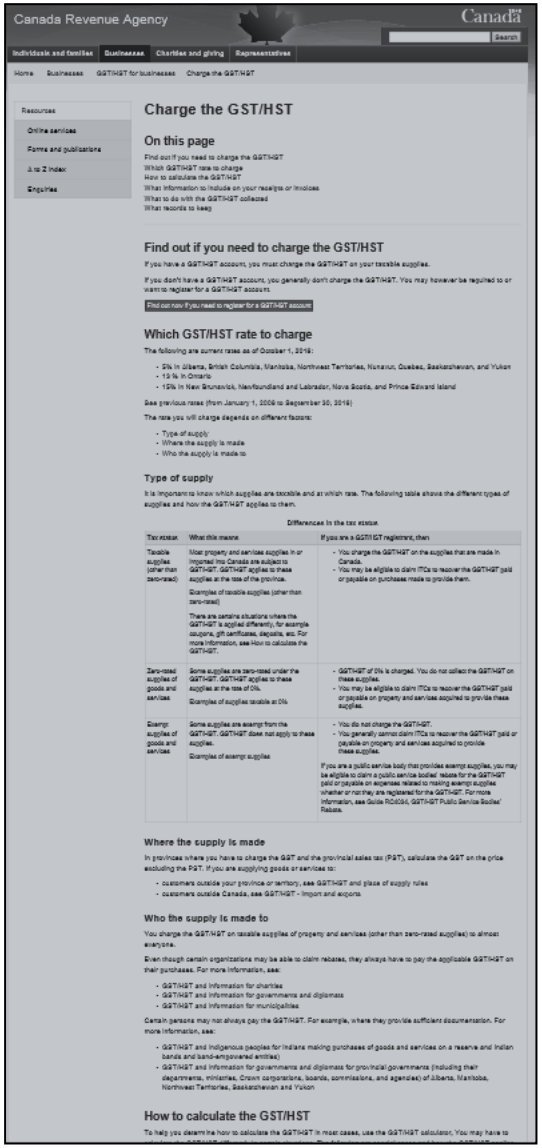
Task success – before and after



+35%

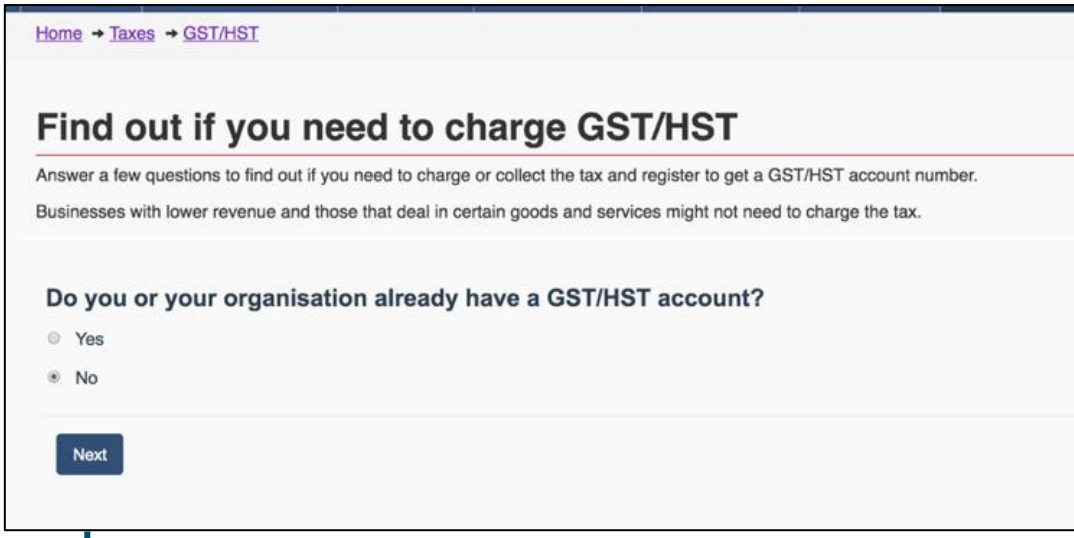
Improved **Task Completion** rate

Example – question-and-answer patterns

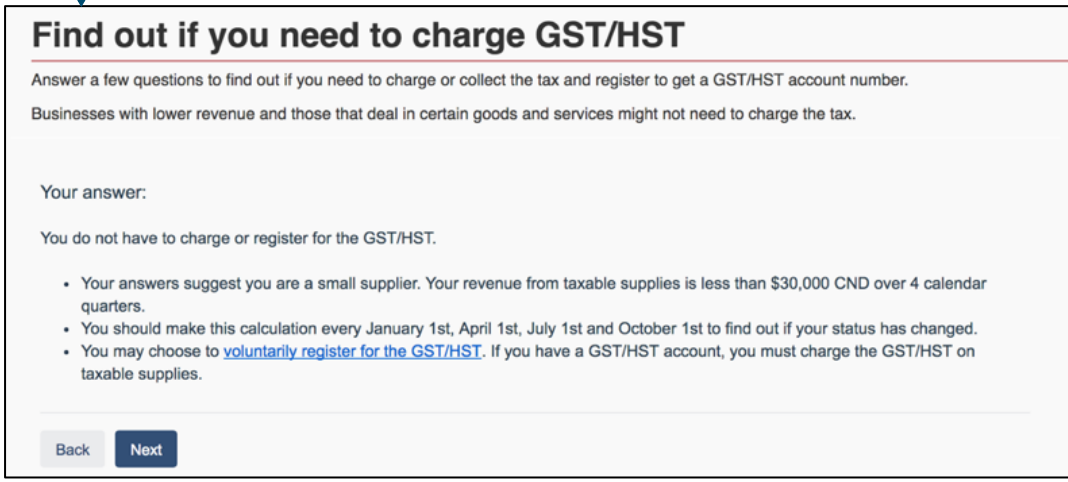


Before – Long page with tables to explain requirements

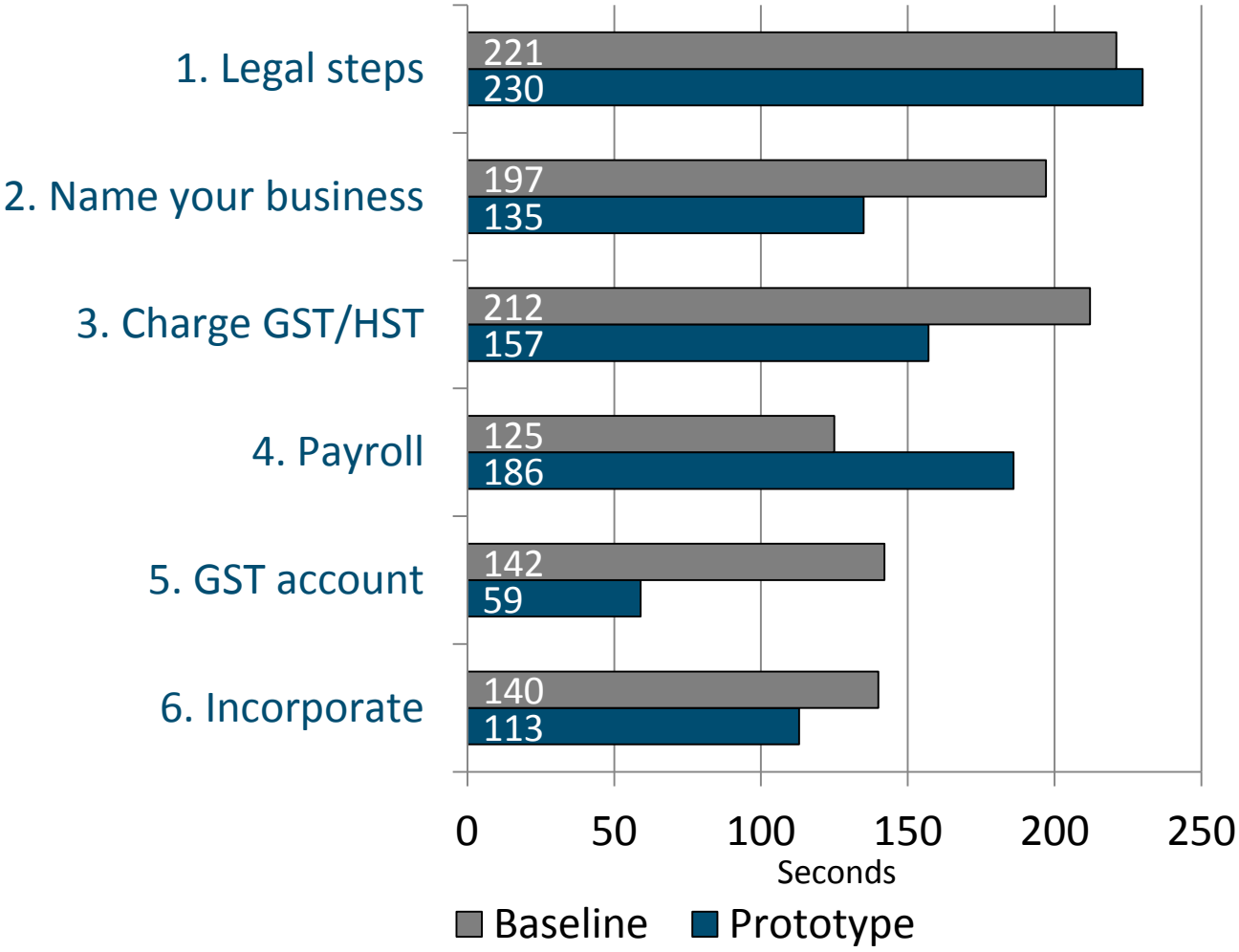
After – series of Qs & As, aka "Wizard"



(Max. of 4 more plain language questions)



Time on task – before and after



-15%

Reduced
Time on Task

Targeted pilots - learnings

Pilots as nudges

- Behavioural evidence drives optimization
- Optimization can be achieved without massive investments
- Real-world test of design patterns à evolving the guidance

Multidisciplinary collaboration

- Quick and effective decision making, grounded in evidence
- Facilitated by working together on prototypes

Digital design

- Small-scale changes can result in big improvements
- Powerful patterns: Step-by-step, question-and-answer
- Clear and simple language is key

The Takeaways

Document rules and treat them as tools

Collaboration pays dividends

Choose words people understand,
and display them in ways they expect.

Fix what people care about to
drive improvements.

Evidence matters

We’re just getting started…

- Expand this approach to optimize **more** and **more** and **more** top tasks
- Continue to nudge teams to **look to the people** outside their buildings

Thank you

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