Project 5
Affinity diagram

Overview

Learning how to run an affinity diagram session, and being confident in doing so, is one of the most important skills for a UX professional.

In this project, you'll review all of the research you conducted in your previous projects. Take notes during this review and then use those notes to create an affinity diagram which will represent your analysis of what you've learned so far.

Ideally for this task, you should get at least one other person to help you. It isn't compulsory to get another person involved, but creating an affinity diagram works best as a collaborative exercise. They'll have to review all the research too so it's a bit of a commitment for them. So give them advanced warning and bribe them with plenty of chocolate. And maybe a free lunch.

Objectives

- Create an affinity diagram
- Learn how to put structure on qualitative research data
- Learn the power of collaborative analysis
- Showcase this technique in your portfolio

Tasks

There are lots of tasks involved in the project, which are outlined below. Here's some important advice before you start - take photographs at every step during this project. When you're writing on each Post-it. When the Post-its are up on the wall in a mess. When you're making sense of the Post-its. And at the end.

This before, during and after will help tell the story in your portfolio. Also, remember that the end result of this exercise is an affinity diagram that you can use to create a customer journey map. It's always useful to know the end point before you start.

1. Share your research data. Prior to the affinity diagram session, your helper will need to see the research recordings and take notes. You'll need to explain what they should be looking for when taking notes:

   - For the usability tests, they are looking for primary and secondary goals, pain points and mental models
   - For the depth interview, they are looking for goals and context

2. Take your own notes. You also need to document your initial assessment of the research. Review the recordings and for each session, make note of everything you feel is relevant to describing the current user experience: goals, behaviours, pain points, mental models and contextual information.
   Don't worry about capturing everything. And there's no need to classify your notes as being a goal or a behaviour etc. Remember, this is messy and subjective. Feel free to be freeform.

3. Prepare a room for the affinity diagram exercise. You'll need a large whiteboard or use our favourite portable whiteboarding product: the magic whiteboard. You'll need a stack of Post-it notes and whiteboard markers. And your laptop to review the recordings, if necessary.

4. Begin the process of creating the affinity diagram. Using Post-it notes, write down any notes or observations from your notes that you deem relevant to articulating the current airline booking experience.
   Some tips:
   - Write one observation per Post-it only
   - Be as descriptive as possible within the Post-it note - remember somebody else will be trying to read it too
   - Allow 30 minutes for this part of the exercise. Give yourself more or less time as required

5. Organise the Post-its. Stick them all on the whiteboard and start to organise them into groups that make sense.
   Some tips:
   - Start by taking two Post-its that seem related and group them together
   - Keep adding more if you find other relevant Post-its
   - Feel free to break up groups and rearrange them if you don't think they work

- Get granular with your groups. Wherever possible, take large groups and organise them into smaller subgroups.. The more specific the group, the more useful it will become when redesigning the process
- Some Post-its don't belong to any group. These are single group Post-its. Don't waste time trying to find them a home. Just leave them as singletons
- Allow 60 minutes for this activity

6. As per the module video, draw a border around each group and give it a meaningful name. It should describe what the group means. If you are having difficulty describing the group, it means you haven't organised the Post-its into truly logical groups. You probably need to subdivide the group further.

7. Finally, sequence each group in chronological order. Assigning number one for the first group encountered by your users on their journey, number two and so on. Some groups might be encountered more than once or might be a constant experience throughout the journey. Make note of these.

8. Review your work. You should have clear groups that correspond to (usually) negative experiences that need to be addressed during a redesign of the website. Your research data has gone from highly unstructured to relatively structured. Further structure will be applied in the next exercise.

Key considerations

- You are free to create the affinity diagram in any language
- Projects are not graded but reviewed to ensure a sufficient level of work has been done

What do you need to upload to your Dropbox folder?

Take a photo of your affinity diagram. Make sure you get everything into the photo but that it's close enough to read the group names. If you need to take a handful of photos to capture this, that's fine.