

# Contacts Fields Card Sort

This card sort exercise was conducted from February 6 - 12, 2018 by internal Herbalife employees. The goal of this card sort was to get consensus on logical groupings of fields on the contact page. The current iteration of this page has confusing categories and fields just thrown in. It was conducted to support [User Feature 440](#).

## Results

You can find the Card Sort Exercise [here](#).

When reading the results table, keep the following in mind:

- All fields marked above 50% are marked in green.
- All fields between 30% - 49.99% are marked in yellow.
- Anything below 30% falls in to the outlier category, and will be ignored.

The results are as follows:

Items	Personal Information	Contact Information	Business Information	HN Connect Information	Not Needed For Anyone
First Name	57.10%	42.90%	0%	0%	0%
Middle Name	57.10%	28.60%	0%	0%	14.30%
Last Name	57.10%	42.90%	0%	0%	0%
Suffix	42.90%	42.90%	0%	0%	14.30%
Local First Name	42.90%	28.60%	0%	0%	28.60%
Local Last Name	42.90%	28.60%	0%	0%	28.60%
Gender	85.70%	14.30%	0%	0%	0%
Marital Status	85.70%	0%	0%	0%	14.30%
Birthday (with only day and month specified)	85.70%	14.30%	0%	0%	0%
Age Range	71.40%	14.30%	0%	0%	14.30%
Language Preference	85.70%	14.30%	0%	0%	0%
Primary Email	0%	100%	0%	0%	0%
Secondary Email	14.30%	71.40%	0%	0%	14.30%
Primary Phone Type	14.30%	57.10%	0%	0%	28.60%
Primary Phone (with country indicator)	14.30%	85.70%	0%	0%	0%
Secondary Phone Type	14.30%	57.10%	0%	0%	28.60%
Secondary Phone (with country indicator)	14.30%	71.40%	0%	0%	14.30%
Social Accounts (Facebook, Twitter, etc.)	14.30%	85.70%	0%	0%	0%
Preferred Method of Communication	28.60%	71.40%	0%	0%	0%
Primary Mailing Address	28.60%	71.40%	0%	0%	0%
Interests (checkboxes). Change to "Motivations".	42.90%	14.30%	42.90%	0%	0%
Last Order Date	0%	0%	100%	0%	0%
Contact Type	0%	28.60%	42.90%	28.60%	0%
Lead Rating	0%	0%	57.10%	28.60%	14.30%
Lead Priority (hot / cold)	0%	0%	57.10%	28.60%	14.30%
Country of Residence	42.90%	42.90%	14.30%	0%	0%
Relationship	28.60%	0%	57.10%	14.30%	0%
Herbalife Anniversary	14.30%	14.30%	71.40%	0%	0%
Club Customer (checkbox)	14.30%	0%	85.70%	0%	0%

Loyal Customer (checkbox)	0%	0%	100%	0%	0%
Wellness Customer (checkbox)	0%	0%	100%	0%	0%
Type of Lead	0%	0%	57.10%	42.90%	0%
Created Date	0%	28.60%	28.60%	42.90%	0%
Lead Submission Date	0%	0%	57.10%	28.60%	14.30%
Lead Acceptance Date	0%	0%	71.40%	28.60%	0%
Distributor (long string value ?)	0%	0%	57.10%	14.30%	28.60%
Date of Age Capture	28.60%	0%	0%	28.60%	42.90%
Contact Source	0%	14.30%	28.60%	42.90%	14.30%
Contact Origin	0%	28.60%	14.30%	28.60%	28.60%
Comments	14.30%	14.30%	0%	57.10%	14.30%
Secondary mailing address	14.30%	71.40%	0%	0%	14.30%

### Additional Comments:

Primary Phone / Email could be "Phone" and "Email". Secondary Phone / Email could be "Alternate Phone" and "Alternate Email".

### UX Recommendations:

- All fields in green should belong to the column it is in. For example, First Name in Personal Information
- All fields in yellow alone should go in the column it is in. For example, Date of Age Capture in Not needed.
- All fields with yellow in multiple columns need to be finalized. For example, Country of Residence in Personal Information and Contact Information.
- Change the labels of primary and secondary phone, email and address to "Phone, Email, Address" and "Alternate Phone, Alternate Email, Alternate Address" respectively.
- Roll the Phone Country field in to Phone.
- Remove the "HN Connect" section. Any orphans from this column in green or yellow will need to find a different home (Contact Source and Comments).
- Comments label needs to be changed to "Personal Notes" or something similar.