



Quantitative brand architecture validation

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Quantitative brand architecture validation

The client | [AlphaCo](#): A B2B software company with an expanding portfolio of accounting and bookkeeping products/ services for small businesses.

01

Context

Given AlphaCo's expanding portfolio of products and services, a newly organized brand architecture was developed to guide users to the correct information.

02

Issue

Internal teams at AlphaCo proposed a new brand architecture, but leadership won't move to adopt it for an upcoming website redesign without quantitative validation.

["We're numbers people"](#)

– AlphaCo Senior Brand Manager

03

The ask

Quantitatively validate the new brand architecture.

Quantitatively and qualitatively motivate a choice among labels at two levels.



The solution

Planning: Our team had never quantitatively validated a brand architecture prior to this engagement. I researched and proposed a new method, tree testing, with A/B testing of labeling candidates.

Instrument: Online tree-test survey (Optimal Workshop) of 400 small business owners and accountants. A/B testing of brand architecture and 4 sets of labels. Follow-up survey to gauge participants' subjective experience with the architecture

Timeline: 3.5 weeks

My role:

1. Client communication (w/ team)
2. Survey development
3. Data collection
4. Story-development & visualization (w/ team)

Agency + Client education: What is a tree test?

Tree testing is an unfamiliar methodology to most: I needed to educate and assure both Lexicon upper management and the client team on the basics and distinct advantages of tree testing for brand architecture research before project approval.

Research proposal: *What is a tree test?*



Sample Question

Task 1 of 9

Imagine you are a business owner at a small company. At the end of the month it is time to make sure all staff receive their compensation. Using the menu below, where would you find information to accomplish this task?

Manage your compliance

Manage your money

Manage your workforce



Manage your compliance

Manage your money

Manage your workforce



Get payroll

Get benefits

Get organized

Get expert advice

Manage your compliance

Manage your money

Manage your workforce



I'd find it here

Get payroll

Employee payment

Payroll taxes

Get benefits

Get organized

Get expert advice

Client education

Before moving forward with research, we had to define and walk-through a simple tree-test:

A tree test is a quantitative UX research method to validate information architectures:

1. Confirms that architecture is clear and navigable
2. Identifies where users get lost or backtrack, yielding direct insights on where and how to improve.

Participants complete the study online (unmoderated). Success rates, click paths, and time-on-task are collected automatically.

Setting expectations

Primary Measure: Success Rate

The percent of respondents who successfully navigated the tree on the assigned task.

%80+	Excellent
65-80%	Very good
50-64%	Needs work
<50%	Needs major redesign

Secondary Measure: Directness

The percent of respondents who navigated the tree without backtracking.

%70+	Pass
<70%	Difficulty finding right path

Secondary Measure: Subjective Navigability rating

Respondents rated ease of navigation on a 5-point likert scale.

>60% 'Easy' / 'Very Easy' ratings & <20% 'Difficult' / 'Very difficult' ratings	Pass
<60% 'Easy' / 'Very Easy' ratings or >20% 'Difficult' / 'Very difficult' ratings	Suggests frustration

Defining success

Success rates during a tree test are expected to be roughly 20% lower than actual success rates on a finished product (a full website or software with camera-ready graphic design).

Success rate benchmarks are derived from industry-wide tree testing standards. The architecture is validated at 65% or higher.

Additional indicators of success are drawn from:

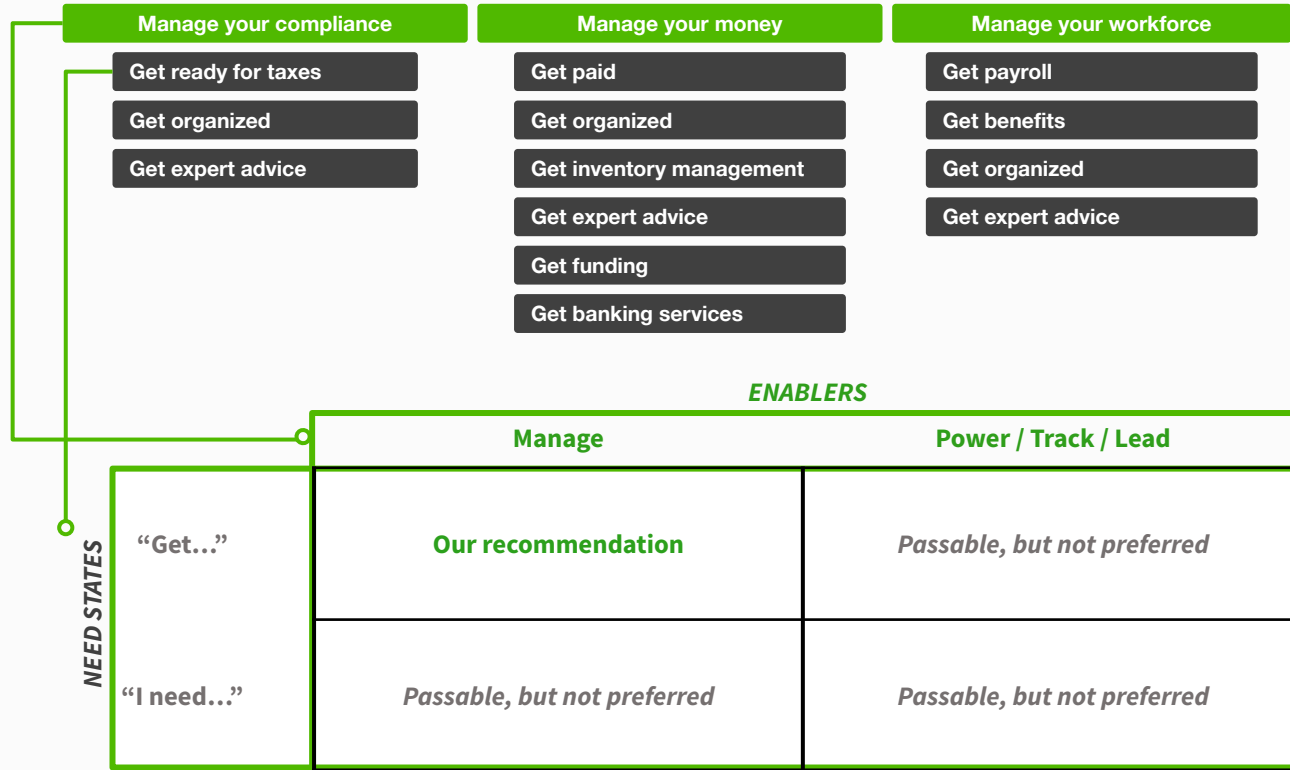
Scalar (Likert) questions in post-test survey

Open-ended questions giving testers an opportunity to comment on navigability

- ★ Our team dedicated considerable time in early stages to aligning on expectations with the client team. Otherwise, a success rate of 65% could seem shockingly low.

Our Recommended Architecture:

For a clear and consistent system that allows for portfolio expansion, use this structure with these labels



Executive Summary: Overall Good News

Is the Architecture Navigable?

YES: 73% of respondents rated the system as easy to navigate.
The overall success rate (68%) exceeded benchmark.

Enabler Level:

“Manage” is preferred over
“Power / Track / Lead”

Need State Level:

“Get...” is preferred over
“I Need...”

Additional Insights

- Both *“Money”* and *“Compliance”* on the Enabler level might be sources of minor confusion.
- A general pain point: the *“I might need a document”* mindset.

Unpacking

Easing into details

We've just shared our recommendation, so now it's time to explain ourselves.

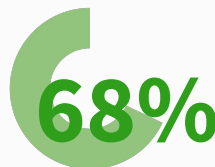
Still at quite a high level, we start introducing numbers in a graphically impactful way and in plain view of the main result ("the proposed architecture is validated!")

At this stage, we wanted to show that *any* option the client chose was a potentially good direction. This keeps:

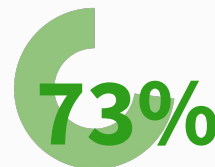
1. The report positive,
2. The cognitive load low, and
3. The clients' secret preference safe before delving into winners and losers

AlphaCo's proposed architecture is validated across all candidate label sets:

Participants successfully navigated the architecture, positively rated *Ease of Navigation*



average success rate across versions.



of participants said they found navigating the menus *easy* or *very easy*.

Key: Success rate	
> 80%	Excellent
65–80%	Very good
50–64%	Needs work
<50%	Redesign

Unpacking, cont'd

More easy numbers

As before, we keep numbers to a minimum and apply meaningful color-coding and graphs to start to see how the different versions of the architecture differ from each other.

Top-level Labels: *Manage* Outperforms *Power / Track / Lead*

Manage saw higher success rates and directness scores, indicating easier navigability with this labeling approach.

All labels at the Enabler level were rated highly for key attributes. **Manage** came out slightly ahead.



*Mean rating of 4.74 on 1–6 Likert scale indicates high overall reception.

[APPENDIX: RATINGS](#)

In the weeds

For the “numbers people”

This table was created for the client’s research team, which fully articulates the data reported in aggregate on the previous slides.

We walked the client through this and the subsequent slides so that they could fully understand their data and make more informed decisions. They’re “numbers people” after all!

How did navigability vary across tasks?						
SUCCESS RATE BY TASK			VERSION			
			B	A	D	C
			Manage + Get	Power/Track/Lead + Get	Manage + I need	Power/Track/Lead + I need
TASK	1	Employee payment	72	53	65	61
	2	Time tracking	89	78	83	76
	3	Money movement	75	62	70	73
	4	ST Loan	79	65	77	75
	5	Bookkeeping	64	53	58	47
	6	Manufacturing	60	57	65	61
	7	Invoices	72	72	77	71
	8	Reports	67	66	53	57
	9	Expense tracking	74	80	60	70
Overall success rate			72	65	67	66
Key: Success rate						
> 80%	Excellent	50–64%	Needs work			
65–80%	Very good	<50%	Redesign			

Client education, redux

Empowering the client to present the results to their internal teams

Tree tests provide a wealth of information, so much so that it can be intimidating or confusing for clients.

We overcame this with detailed visualizations and instructions for how the client can fully engage with their data (beyond accepting our recommendation at face value).

Destinations Map: How to Read

Numbers represent how many participants selected a specific function label as the solution for each task (combined from all 4 versions; $N = 401$).

Green boxes are **correct** destinations.

Incorrect destinations are color-scaled in red (i.e., a heat map): darker red = more participants who chose the incorrect solution. Color-scaling is *by task* (in columns).

Read by columns: Identify where participants most often went wrong for a given task.

Reading by rows: Identify function labels (third level) that serve as *distractors*: functions that consistently sound like a believable correct solution, even when they're not.

DESTINATIONS			TASKS								
			1	2	3	4	5	6	7	8	9
X your compliance	Y tax guidance	Tax documents	10	1	3	4	4	1	2	29	48
		Expense tracking	3	0	6	4	14	1	3	22	113
	Y organization help	Reports	16	29	22	5	23	37	19	162	11
		Document Storage	2	6	6	3	8	51	3	11	14
Y expert advice		Accounting	3	2	10	8	73	4	6	43	14
	Y payment	Invoices	22	3	12	1	1	0	293	1	10
		POS Payment	16	1	7	4	2	0	17	2	3
		Expense tracking	1	4	49	5	39	5	4	8	74
Y organization help		Reports	4	8	32	2	9	3	5	31	25
		Insights	0	0	3	0	7	3	0	7	2
	Y inventory management	Manufacturing	1	3	1	1	2	244	1	3	3
		Sales	1	3	27	6	11	15	16	20	26
Y expert advice		Bookkeeping	4	1	11	15	149	1	2	17	25
		Capital	6	0	2	74	1	1	0	1	0
	Y funding	Short-term loan	5	0	0	175	0	0	0	0	0
		Credit	2	1	0	48	2	1	3	0	1
Y banking services		Money movement	32	0	209	39	20	1	13	14	15
		Crypto management	1	0	1	0	1	1	0	1	1
	Y payroll	Employee payment	252	37	1	1	1	0	5	3	1
		Payroll taxes	6	5	3	0	1	0	0	2	10
Y benefits		Healthcare	5	0	2	0	1	0	0	0	0
	Y organization help	Time tracking	7	290	1	1	3	14	7	12	3
	Y expert advice	Workforce consulting	2	7	2	5	29	18	2	12	2