DrupalCon
PORTLAND 2024
6-9 MAY

Sandstorm + Milken Institute

Hitting 'Save As' & Transforming
UX, Taxonomy & Search for a Think Tank Website

Hi, we're Sandstorm®

Accessibility-certified, digital experience technology agency for purpose-driven brands

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+ **25+ yr** old digital experience design agency

+ **4,600+ hrs** of usability & UX research

+ **15+ yrs** building sites in Drupal

+ **CPACC (Accessibility)** certified

+ **WBENC** certified (women-owned)

+ **Yes, And...** philosophy

Project Snapshot

The **Milken Institute** is a **nonprofit, nonpartisan, global think tank** with a focus on finance, health and philanthropy.

We did research, design and development for their soon-to-launch new website.

Case Study Overview
- Discovery
- Collaboration & Architecture Principles
- Taxonomy
- Search

Before

Explore the program for the upcoming 2024 Global Conference, taking place May 5-8, 2024.

VIEW PROGRAM

EVENT

Global Conference: May 5–8, 2024

Join us for our 27th annual Global Conference, where thought leaders, innovators, and change-makers will convene to explore the theme "Shaping a Shared Future."

VIEW AGENDA

REPORT
Building a Resilient America: The New Consensus for Action

EVENT
Global Conference: May 5–8, 2024

REPORT
Modernizing Care for Obesity as a Chronic Disease: A How-To Guide for Employers
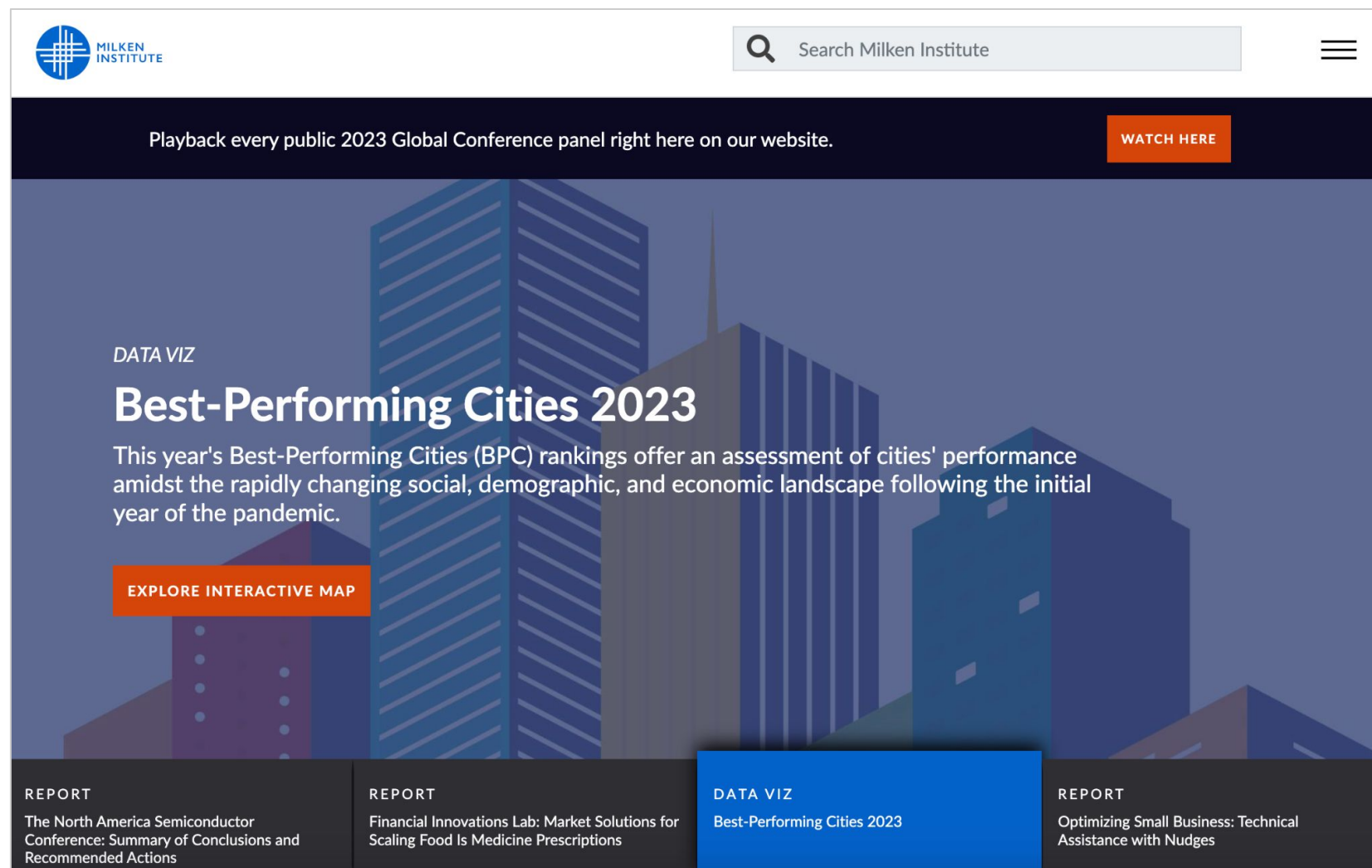
POWER OF IDEAS
Global Conference 2024 Collection

Catalyzing Solutions. Building Meaningful Lives.

Biggest Opportunities

- Better articulate **who they are and what they do**.

- **Improve visitor engagement** (most visits 2 pages or less).

- **Provide stronger conversion opportunities.**

- **Improve site performance and reliability.** The experience was dominated by loading spinners and sporadic outages.

Biggest Challenges

1. Timeline

2. Limited access to users

3. Equipping in-house team for ownership

4. Mission-critical event functionality

Discovery & Personas (...in a hurry)

- Stakeholder workshops, targeted follow-ups
- User interviews (1:1)
- Social media profile review
- Analysis of successful existing assets
- Content inventory
- Analytics
- Competitive analysis (AI)

"Save As" or Clean Slate?

The current site was on Drupal 10.

Benefits of Building from Existing Site:

- Limit the needs for content migration
- Eliminate the need to rebuild the Salesforce events integration

Drawbacks:

- Living with or addressing previous development choices
- Risks/fears that it was a bad egg that couldn't be saved

Decision: "Save As"

After conducting a code audit, we decided to work from the existing site.

1. Picked a cut over date (after which new content would be created on both sites)

2. Developed a Drupal architecture plan marrying existing content to future designs (creating, transforming or leaving as is)

3. Brand new theme and introduction of Layout Builder

1. **Be nice to content admins present and future**

Viewable pages should be managed as **content types** for simplicity in content management, templating, and not fighting Drupal.

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2. Be stingy in introducing new content types

Add one when:

- Content requires a unique set of fields
- A default Layout Builder layout will encourage consistency

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3. Minimize any changes

To events-related entities that have dependencies on Salesforce integration

#1 Thing We Heard in User Interviews

The desire to have content readily labeled by very specific topics.

- 1000s of nodes to tag
- 17 existing vocabularies
- Strong SME opinions on labels
- Project success tied to getting this right

1. **Reduce/Reuse/Recycle**

- Round up similar vocabularies
- Consolidate, remove duplicates, remove vague terms
- Pick the best closest one
- Transform: Update terms, delete terms, nest

2. Nest

In order to deliver on the narrow/specific terms our users wanted, we would need 80+ terms making nesting important.

3. Use AI to refine

Example Prompt

"How would you organize and revise these terms into a website taxonomy that is **clear, hierarchical and optimized for search?**"

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4. **Negotiate**

Review with SMEs to check
for omissions or inaccuracies

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And a Menu to Support It

Search

73 results for: happiness

SHOW ADVANCED FILTERS

Sort by: Relevance

Results per page: 12

PERSON

Laura Carstensen

Laura Carstensen is a professor of psychology and the Fairleigh S. Dickinson Jr. professor in pub
+ Read More

Nov 30, 2023

PANEL

Happiness and Sustainability: Changing Our Approach to Growth

We live in a world that often values output, busyness, and economic growth over subjective outco
+ Read More

May 7, 2024

PANEL

Wellness Lounge | Happy Not Perfect

Dec 7, 2023

PANEL

Happiness is a Warm Puppy

Puppy playtime has been shown to reduce blood pressure, promote focused interaction with others,
+ Read More

May 1, 2019

PANEL

Happiness is a Warm Puppy

Puppy playtime has been shown to reduce blood pressure, promote focused interaction with others,
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Apr 30, 2019
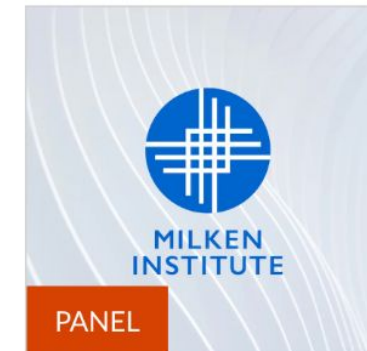
PANEL

Happiness is a Warm Puppy

Puppy playtime has been shown to reduce blood pressure, promote focused interaction with others,
+ Read More

Apr 29, 2019

The existing Solr search got a bad rap because of poor performance and design.

Search

Frequently requested features went undiscovered behind "advanced filters."

Search Web Components

by Kyle Einecker (ctrlADel)
drupal.org/project/search_web_components

Module provides a library of **flexible components** built on top of **Decoupled Search API endpoints**.

Leveraged for a variety of filterable experiences:
- Site Search
- Topic Pages
- List of Experts
- Event Program

"Gone are the days of fighting with Views and Ajax to get a half working search that site owners are *kinda* okay with."

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Search: Improved Design

- **Only filters that limit the list** appear

- **List updates instantly** when filters are selected

- **Filters are exposed** with collapsing and show more options as needed

- **Autocomplete dropdowns** for long lists (experts, events)

- **Number of results** indicated and user controls for how many to show

- Path to **sibling pages**

- **Context-rich** results

Lessons Learned

What We Would NOT Do Again

1. Rely as heavily on manual retagging
2. Wait to leverage AI for taxonomy
3. Saddle the in-house team with deployments

What We WOULD Do Again

1. User research to drive the direction for the navigation and how users expect to see related content displayed
2. Err on the side of transparency and collaboration
3. Use of Search Web Components

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We love questions!
And making Drupal friends!

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