



ENTERPRISE KNOWLEDGE

Governance and Iteration of Taxonomies

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Founder and Principal



Agenda

- Defining the Business Taxonomy
- Taxonomy Governance Challenges
- The Keys to Taxonomy Governance

DEFINING THE BUSINESS TAXONOMY



Taxonomy Definitions

tax·on·o·my (tāk-sōn-mē)

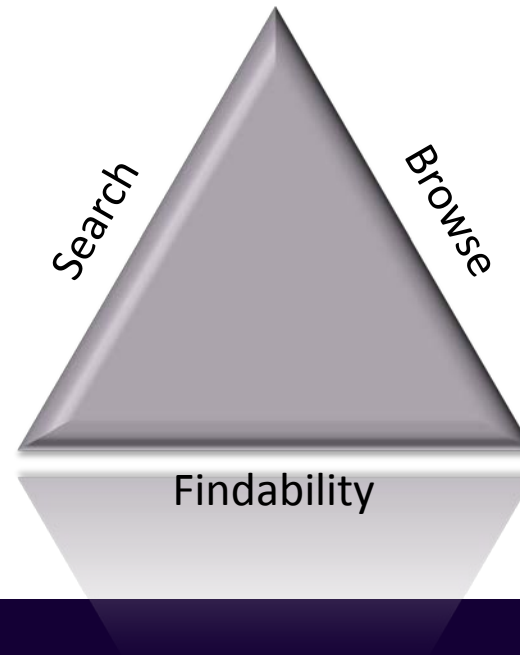
n. pl. **tax·on·o·mies**

1. The classification of organisms in an ordered system that indicates natural relationships.
2. The science, laws, or principles of classification; systematics.
3. Division into ordered groups or categories: "Scholars have been laboring to develop a taxonomy of young killers" (Aric Press).

Zach's Definition – Controlled vocabularies used to describe or characterize explicit concepts of information, for purposes of capture, management, and presentation.

Taxonomy and Metadata

- Provide structure to unstructured information.
- Join or relate multiple disparate sources of information.
- Provide multiple avenues to find and discover information.
- Enable findability.



Taxonomy and Metadata



Free Text Entry

Brochures & Manuals
Memos
News
Policies & Procedures
Presentations
Reports
...

...
Employee Services
Compensation
Retirement
Insurance
Education & Training
Manufacturing
Safety
Quality
...

Metadata "Card"

Title

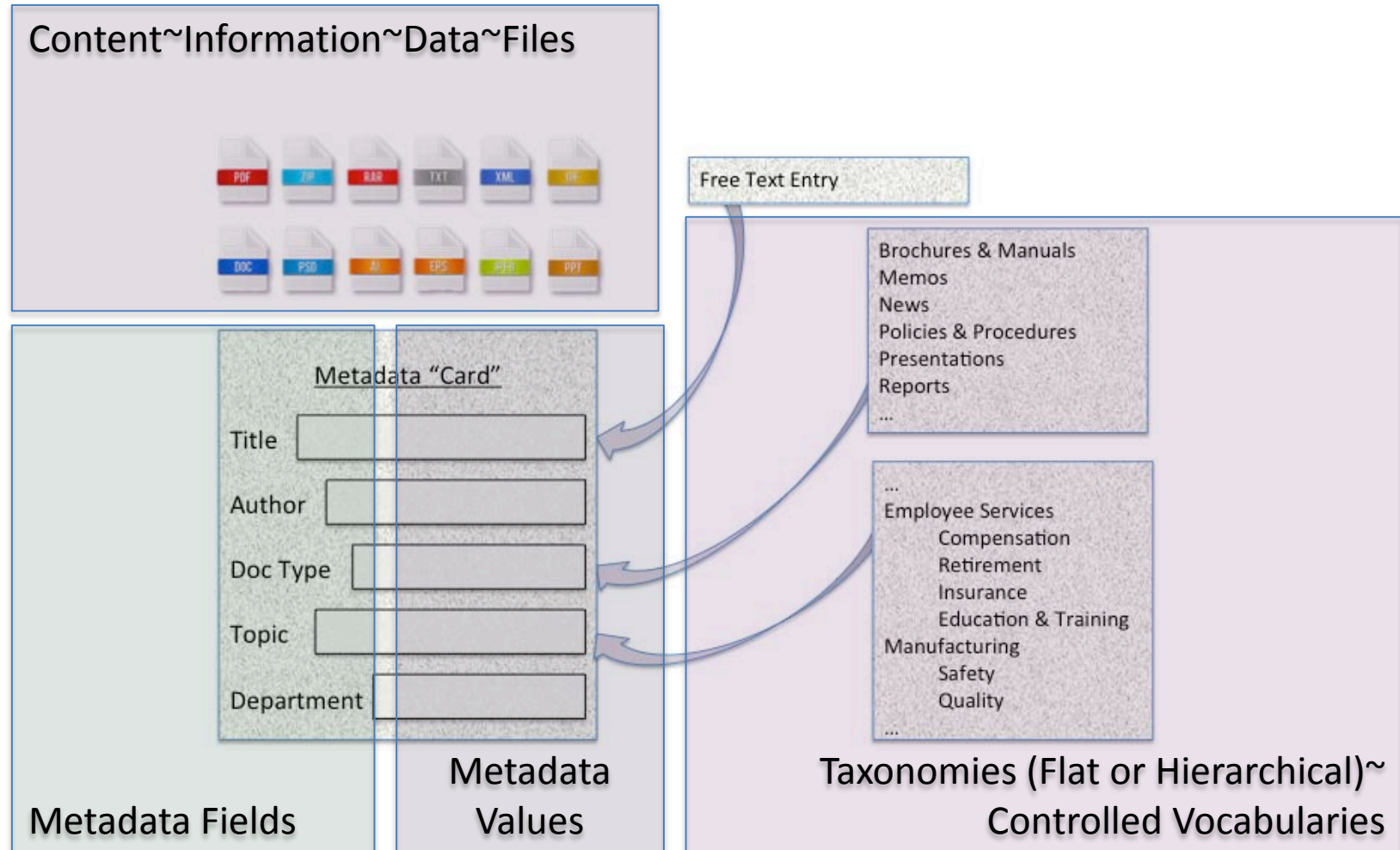
Author

Doc Type

Topic

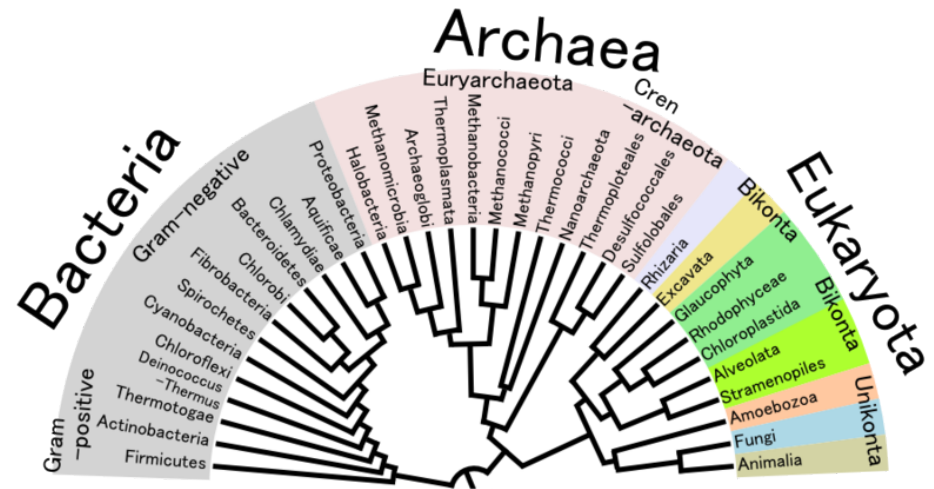
Department

Taxonomy and Metadata



Traditional v. Business Taxonomies

- Traditional taxonomies are classification for the sake of classification.
- Business taxonomies are classification for the sake of findability.



The Business Taxonomy

- Usable – Easy to adopt and utilize for any skill level.
 - Relatively flat (2-3 levels)
 - “Easy” to navigate
- Intuitive – Does not require training. Reflects the way the user thinks.
- Natural – Uses the organization, vocabulary, and logic of the user.

The Business Taxonomy

- Tend to be less rigid and constrained.
- Influenced by “traditional” usability design.
- Driven by the content and needs you have today.
- Leverages multiple categorization approaches (via multiple metadata fields and multiple taxonomies).
- Accepts imperfect categorization.

TAXONOMY GOVERNANCE CHALLENGES



Taxonomy Governance Challenges


- Long-term ownership and responsibility
- Responding to feedback and usage from enterprise of users
- Interdependencies of taxonomies
- Sustainable iteration while adapting to changing businesses

Long Term Ownership and Responsibility

Historical conflict between owner of taxonomy design project, owner of system in which taxonomy is actualized, and owner of function/business.




Long Term Ownership and Responsibility



Functional/Business
Owner

Priority #1: Does it work for the business?


- Does it make sense to business users?
- Will business users be able to capture, manage, and find the information they need?
- Will it sustain the support of the business?



System
Administrator

Priority #2: Does it work for the system(s)?

- Can design be implemented within the system(s)?
- Does it cause an unreasonable increase in administrative burden?



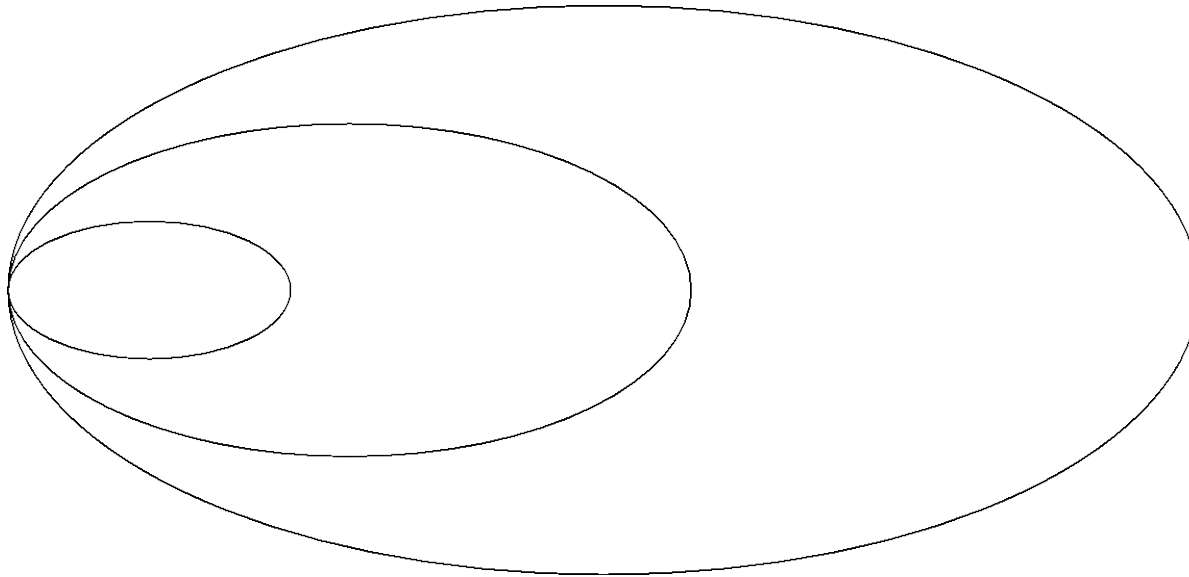
Taxonomy
Designer

Priority #3: Does it work for the taxonomy?

- Does it follow design best practices?
- Does it support the long-term sustainment of the enterprise taxonomy design?

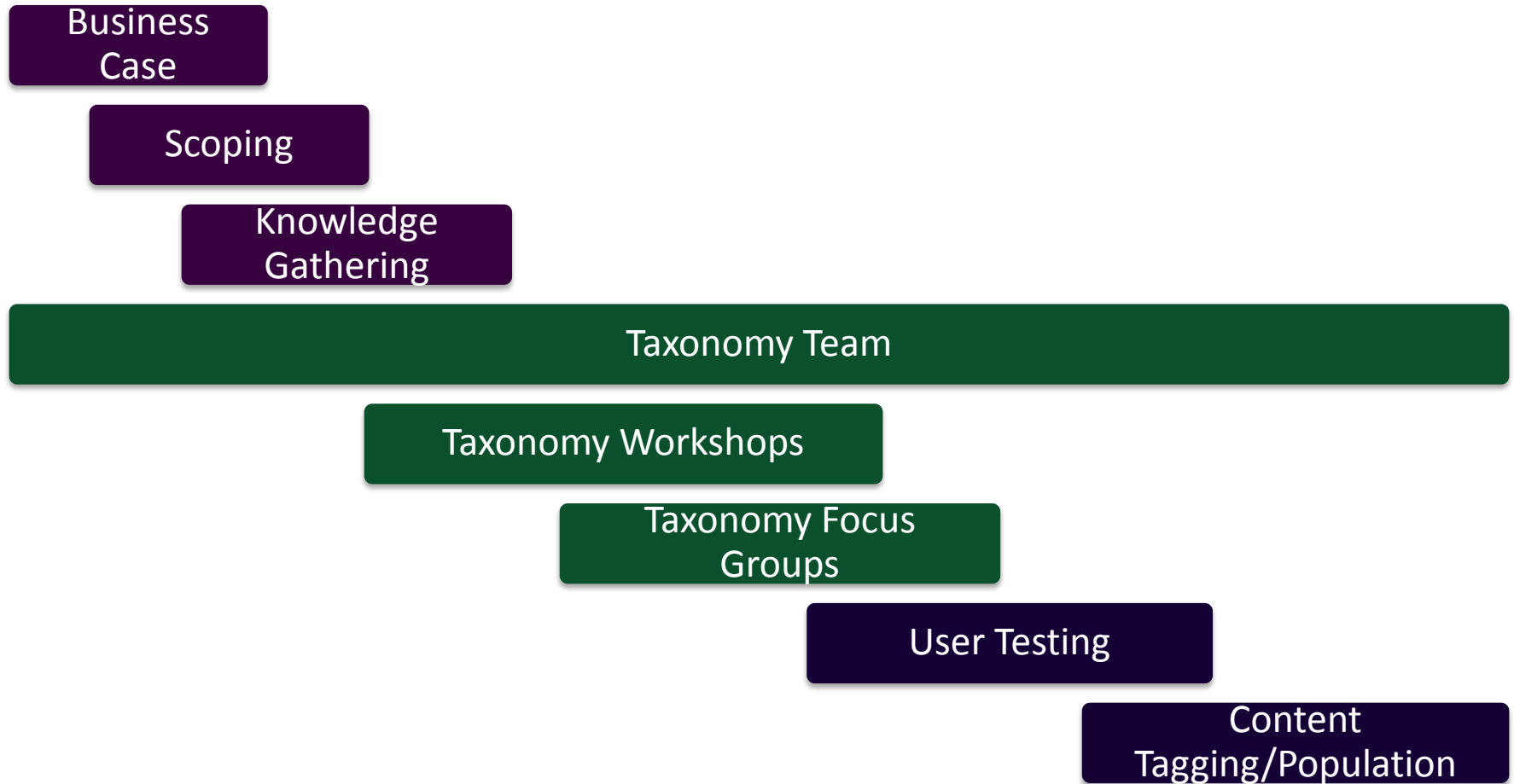
Responding to Feedback and Usage

Most taxonomy design efforts “touch” only a small percentage of the potential body of users. Taxonomies must be designed to change after rollout.



- Taxonomy Team and Core Stakeholders
~12-25
- Focus Groups ~50-100
- Testers/Validators
~75-225

Enterprise Knowledge's Taxonomy Design Methodology



Responding to Feedback and Usage

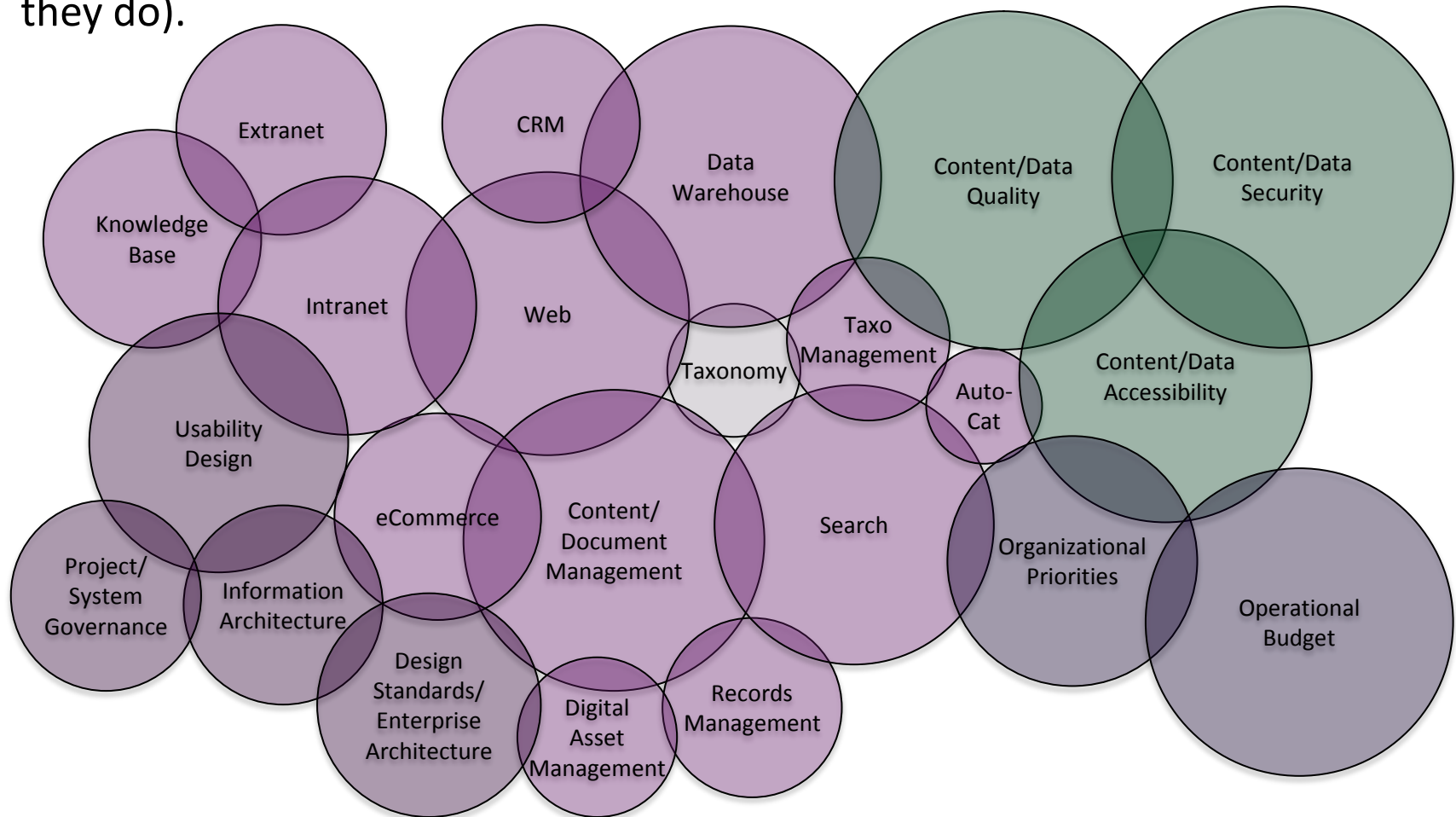
- Active Feedback
 - Surveys
 - Interviews
 - Town Halls
- Passive Usage/Analytics
 - Clicks (Paths, Dead-ends, Content Opened)
 - Searches (Key Words, Frequency, Patterns)
 - Usage (Loyalty, Search v. Browse)

Active v. Passive

	Active	Passive
+	<ul style="list-style-type: none">• Provide potentially powerful anecdotes for marketing• Provide direct guidance on requirements for improvement• Identify “must-haves” for prioritization	<ul style="list-style-type: none">• Represent all users• Present fact instead of perception• Provide consistent data for trending
-	<ul style="list-style-type: none">• Do not represent full body of users• Potentially tainted by externalities• May be skewed toward most vocal users	<ul style="list-style-type: none">• Require inference, subject to misinterpretation• Do not necessarily account for business priorities

Interdependencies of Taxonomies

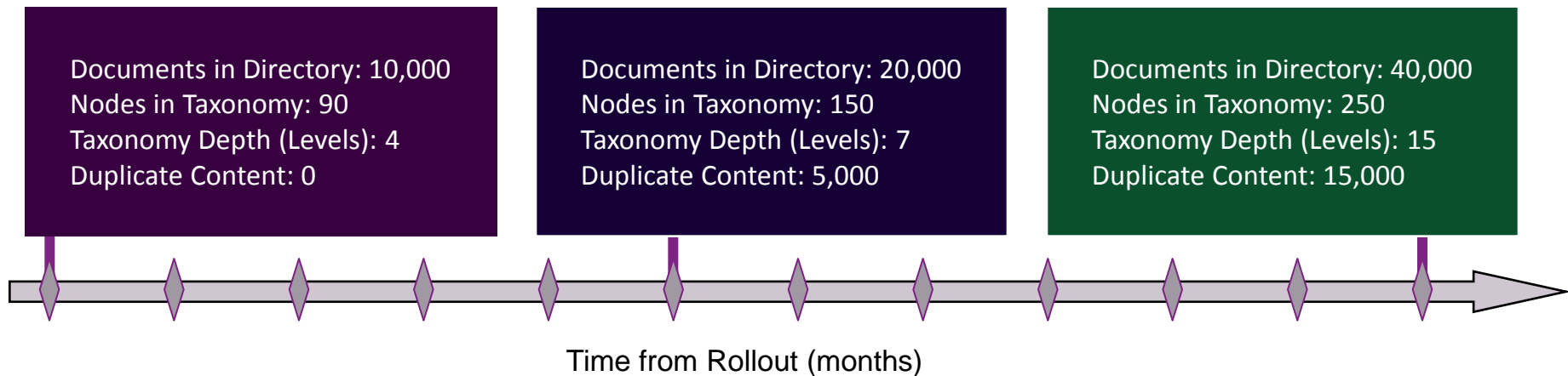
Taxonomy design efforts seldom exist in a vacuum (and probably shouldn't if they do).



Sustainable Evolution

Without appropriate management, taxonomies can atrophy or metastasize quickly.

- Initial efforts can quickly be degraded without effective governance
- Lack of oversight will result in poorly named content and folders
- Lack of coordination will result in duplicated, inappropriate, or incorrectly placed content



THE KEYS TO TAXONOMY GOVERNANCE

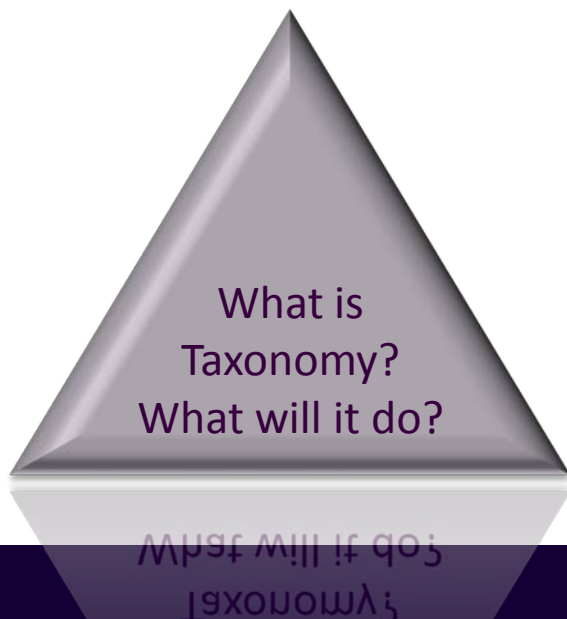


The Keys to Taxonomy Governance

- Business Case - Mission
- Roles and Responsibilities
- Policies and Procedures
- Communications, Education, and Marketing

Business Case - Mission

- Define clearly the what, why, and for whom of the taxonomy and the governance document itself.
 - Clearly define the scope
 - Set expectations upfront
 - Sell constituents on why they need a taxonomy



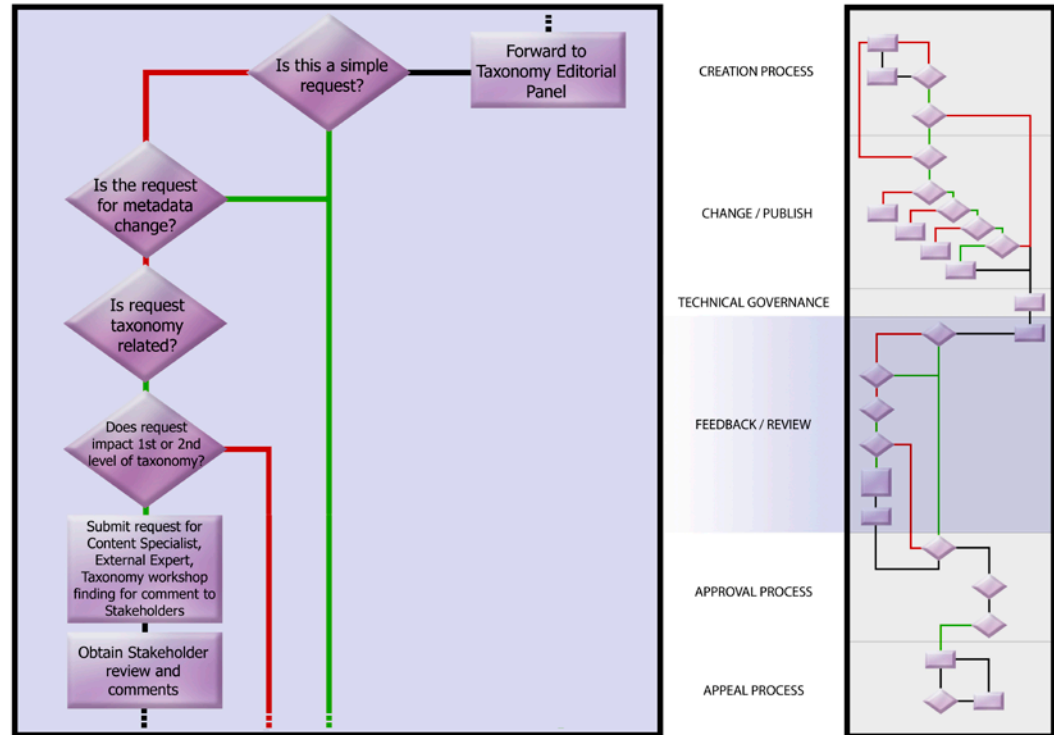
Roles and Responsibilities

- Reference back to Roles and Responsibilities.
- Simple, graphical, written for the end users.
- Provide business users ownership within the project.

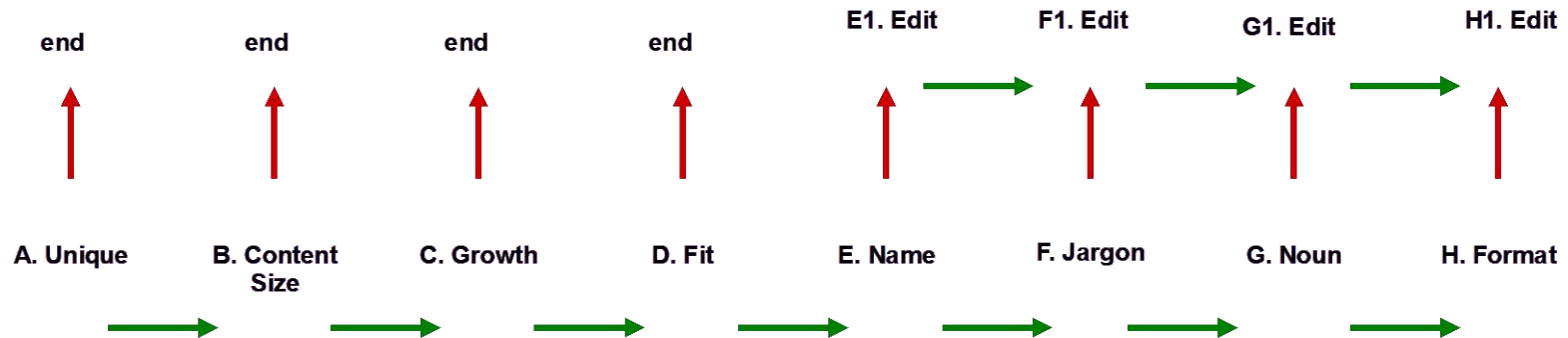
Role	Primary Responsibilities
Editorial Panel Co-Chairs	<ul style="list-style-type: none">►Oversee all Panel activities and ensure decisions are transparent, disciplined, and autonomous►Determine relevant rules when there is a conflict in application►Build board consensus, and represent outliers through the appeals process
Taxonomy Editorial Panel and its Members	<ul style="list-style-type: none">►Oversee the taxonomy activities►Initiate information gathering and consensus►Rectify conflict of pre-defined rules►Ensure that the Taxonomy Editorial Panel has a current, written mission statement, objectives, and a vision►Ensure that the Taxonomy Editorial Panel has written taxonomy policies►Cooperate in the identification and funding of required resources►Promote awareness and use of the taxonomy and metadata standards►Conduct ongoing Taxonomy Workshops
Content Specialist	<ul style="list-style-type: none">►Act as the Panel's liaison to content creators (i.e. users)►Estimate costs of proposed changes►Communicate formal intent and/or taxonomy evolution commitment►Evaluate and provide recommendations to the Taxonomy Editorial Panel►Maintain the physical snapshot of the physical taxonomy, and a thesaurus of metadata terms
Technical Specialist	<ul style="list-style-type: none">►Estimate technical level of effort for proposed changes►Help obtain data from various systems►Understand the hierarchal content organization and impact of changes►Address any changes made to the site navigation

Policies and Procedures

- Reference back to Roles and Responsibilities.
- Simple, graphical, written for the end users.
- Ideally segmented for easy reference.
- Strive to actualize within the system(s).



Policies and Procedures (cont.)



- A. Is the term unique, is it duplicative, and will it require content re-categorization?
- B. Is there ample content to fill necessitate the term (i.e. at least 5 content pieces)?
- C. Will the term be able to grow over time?
- D. Does the term fit into the existing first and second level taxonomy?
- E. Does the name of the term match its content and intent?
- F. Is jargon part of the term?
- G. Is the term a noun?
- H. Is the term properly formatted with regards to capitalization, abbreviations, symbols?

Communications, Education, Marketing

- Give users the ability to learn about the taxonomy by a range of means:
 - One-on-one meetings
 - Live presentations
 - Documentation
 - Animated Tutorials
 - Context Sensitive Help
 - White Papers
- Create two-way communications and prove it means something
 - Document decisions and archive all input
 - Make all feedback available to end users
 - Provide means of communication via the system
- Market the value of the taxonomy and effective metadata use – mandates will not be sufficient

The Business Case for Taxonomy Governance

- Average taxonomy refresh project:
 - 2-4 Months: \$100k-\$400k
- Taxonomy Governance:
 - Initial consulting investment: \$30k
 - In-house support/management: \$21k*

*Assumes 4 hours/week at \$100/hr

Summary Best Practices

- Treat taxonomy as a long-term investment
- Establish clear taxonomy governance:
 - Business Case - Mission
 - Roles and Responsibilities
 - Policies and Procedures
 - Communications, Education, and Marketing
- Maintain the Taxonomy Team to guide future development
- Continuously reexamine the taxonomy
- Establish mechanisms to gather user feedback and respond to it in a timely manner

Most of the work in an average taxonomy project will take place within the Maintenance and Evolution Stage.

No initial rollout of a taxonomy will yield 100% perfection. Striving for that will only delay your project and risk your sanity. By preparing for this on going work, you ensure the hard work of the project team will not be lost. With the correct mechanisms in place, the team can respond to user feedback and bring the taxonomy closer to 100% perfection over time.



ENTERPRISE KNOWLEDGE

Thank you.

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