

Growing Taxonomies

Taxonomy Bootcamp 2010

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Experience:

20+ years of experience as a product manager, consultant, and taxonomist for information, content and knowledge management projects. Includes customer facing e-commerce and intranet projects.

Services:

- Information Strategy
- Taxonomy management
- RFP development
- Project management
- Business Case development
- Strategy and Training Workshops



Growing Taxonomies

Size???

Complexity??

Integrations???

Users???

Impact???

Business Units involved???

There will be political and technical issues that come with all forms of growth.

Mostly technical issues

Size (*Number of terms and relationships*)

This is really a scaling issue for the taxonomy management system. Biggest impact is when you outgrow your existing system. Systems and integration points may limit growth

Complexity (*creating new attributes, relationship types, business rules, workflows, etc*)

May impact the taxonomy management system, integrations, workflows, governance. Can be very expensive to impose the new complexity on the existing structures.

Integrations (*consuming systems*)

New systems may require different formats for import and export. Also, they may impact governance for existing taxonomies. Capabilities of systems may (will) limit growth.

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Mostly political issues

Users (*people or roles involved in creation, management, approval, etc of the taxonomy*)

As the number of users increases the governance processes, style guidelines and policies need to be documented very clearly. Additional user profiles may require additional user interfaces. Needs of existing users may slow growth.

Impact (*usage or dependence on the taxonomy within the organization*)

As more and more processes become dependent on the taxonomy the role of governance becomes more essential. Formal taxonomy QA cycles may be needed. Needs of existing systems may limit the type of change that can occur.

Business Units involved

Governance will become a central issue for the taxonomy.

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A key to managing growth is good communication and a clear set of policies describing what the taxonomy can and **cannot** do for the organization.

Well understood and transparent governance policies are essential – treat them like a service level agreement.

The business drivers for the governance policies **MUST** be understood and easily described

Systems...

The system managing the taxonomy must be able to scale in the following directions:

- Size and complexity of the taxonomy
- Number of users
- Workflow and governance support
- Integration at the API level or import and export

Technical resources must be available

Interfaces of systems consuming taxonomies must be flexible and must be well understood

Often taxonomy growth can be implemented as part of platform upgrades

Impacts go in both directions

Growth may be impacted or limited by the taxonomy model itself, the governance requirements, integrations, staffing, and technical capabilities of your technology.



Summary

Always have the business goals in mind and documented

Bringing on the new partners while continuing to meet the needs of the original stakeholders is all part of the challenge.

Balance group needs versus the organizational needs

Treat the taxonomy as a organizational asset, not a department asset

Good metrics

Good research to support changes

Questions?

Thank You

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This presentation can be found at:

www.garycarlsonconsulting.com/library