

Buy vs. Build: Taxonomy Tools

Identifying & Communicating Requirements

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taxonomy
BOOT CAMP >>>>

Gary Carlson

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.

Provides services for:

- Information Strategy
- Taxonomy management
- RFP development
- Project management
- Business Case developmen



Taxonomy Requirements Gathering

Defines the whole problem, not just the modeling problem

Provides a framework for the build versus buy decision

Gives different departments a chance to weigh in

Will often lead into difficult territory...

Factors Driving Requirements

Model

- Number of taxonomies
- Complexity of data
- Localization requirements
- Size of taxonomies

Integration

- Number of integration points
- Reports and Exports
- Custom Utilities
- API development

Usage

- Change Control
 - Number of user profiles - views
 - Change velocity
 - Business Rules
-

Taxonomy Project Overview



Problem being solved with the taxonomy

Cost of not solving the problem

Business impacts of the problem

IT impacts of the problem

Desired future state

Sources for Requirements

Source	Details
Existing information	Analysis of the existing information and the processes that deliver it to the website
IT infrastructure	Analysis of the applications and integration points storing and managing the information
Internal workflows & governance	Review of the content creation and editorial process with an emphasis on where taxonomies are or should be used
Market and customer research	Analysis of web analytics, customer surveys, customer comments, overall industry trends
Industry best practices	Incorporation of industry lessons learned and best practices
Internal expertise of the employees	Interviews with “on the ground” employees who interact with the taxonomy (whether or not they know what a taxonomy is).
Legal	Review of any legal implications or requirements that pertain to taxonomy management

Modeling Objects

Taxonomies that need to be managed

- Types of structures – flat, hierarchical, thesauri, graph, etc

Types of terms to be managed

- Properties associated with the terms
- Business rules for the terms

Relationships between terms

- Hierarchical, Synonyms (entry), Associative, etc
- Properties associated with the relationships

Relationships between taxonomies

User Profiles

Analysis of different user profiles interacting with the Taxonomy Tool.

Users may be end users or system interfaces.

Includes, Job roles, level of interaction with the taxonomy, types of interaction with the taxonomy (read only, edit, create, etc)

System Integration

For each system level Integration...

What level of complexity can the consuming system handle?

What types of updates can they accommodate?

Frequency of update, formats, bi-directional or uni-directional...

Import/Export Updates

Updates	Description
Description	Description of the Update
System Profiles	List of systems or profiles initiating the update
Frequency	How often are the updates made
Actions	Full description of the actions being taken
Format	Desired format of the results
Delta	Full updates or delta updates
Validation Processes	What data validations processes required during the Updates
Size of Update	Number of objects and attributes to be updated
Bi-Directional	Are the updates bi-directional? If so, Abandon all hope ye who enter here.

Workflow and Governance

Change Control

Roles of different user profiles

Frequency and type of changes

Business rules and notifications

External Processes

Data validation

Custom Ids

Workflow triggers

Pre/post processing

etc

Questions?

Thank You

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