

# Using Enterprise IA to Support Business Strategy

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ASIS IA Summit – Memphis 2009

This presentation is slightly modified from the one delivered at the conference

# Gary Carlson

20+ years- product  
management, consulting,  
taxonomist

Taxonomy, Information  
management, content  
management - strategy



## Where we started

- Home grown systems not scaling
- Organic taxonomy not meeting our needs
- Lack of data governance
- Multiple disparate systems which don't play nicely with each other (and which are not well understood)
- General understanding that we needed to change but unable to justify the initial expense

# A quick look at Enterprise IA

For the purposes of this presentation... we view “Enterprise Information Architecture” as the creation, design, management, governance and integration of information that:

Is shared by two or more systems

Has *Customers* that include backend systems, reports, dashboards, customer facing sites, etc.

Is managed with strong change control and security requirements

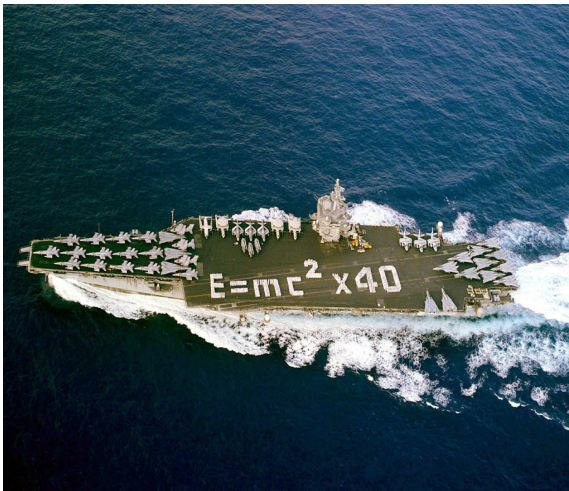
Is managed by business owners as well as technical users

Requires schemas and taxonomies as much as wireframes

# Enterprise???

A large organization with multiple business units sharing a common mission.

In general the different business units (divisions) may have their own mission statements designed to support the enterprise mission (they are not always in sync).



# What is a Business Case?

Describe the project goals and outcomes to all participants (executives, contributors, IT, Marketing, Legal, etc)

Used to stage, scope, and justify the project

Brief – generally less than 2 pages

Contains:

- Problem / Opportunity
- Cost
- Solution
- Approach

# Sources for Analysis for the Business Case

Source	Details
Existing information	In depth analysis of the existing information and the processes that deliver it to the website
IT infrastructure	In depth 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 areas where data consistency could be improved
Market and customer research	Analysis of web analytics, customer surveys, customer comments, overall industry trends
Industry best practices	Incorporation of lessons learned and best practices in the industry.
Internal expertise of the employees	Extensive interviews with employees who are “on the ground” as these insights are often the quite valuable.
Legal	Review of any legal implications or requirements in the content creation and publication process

# Primary meetings with stakeholders

- Opportunity to test and refine initial business case
- Build trust and relationships with the stakeholders who will be essential for project approval and implementation
- Most people already know what needs to be done to fix things
- Cross pollination of ideas early in the process



The problem / opportunity statement addresses **well understood and accepted organizational goals** like:

- Revenue
- Brand
- Operational Efficiency
- Business Intelligence and reporting
- Other mission/vision driven priorities  
*most relevant for non-profits and government projects*

It should not mention technology, taxonomies, content formats, etc

- We focused on Revenue and Brand Health
- Operational Efficiency was definitely monitored and positively impacted, but top line gains were seen as a better / easier justification for the project.

A number of studies regarding the strengths and weaknesses of the their brand. Using these studies and internal marketing goals we were able find areas where an improved information infrastructure would have direct impacts in both strengthening strengths and addressing areas of concern.

In fact many of the goals were not attainable without improvements to the information infrastructure.

We used many sources, including:

- customer interviews

- web analytics

- employee insight

- industry best practices

A number of improvements to the information infrastructure were identified that directly and measurably impacted the online sales funnel.

Anecdotal evidence and industry research suggested that this would also impact retail sales as well

Directly calls out the potential ROI for the project

In general this includes

- New revenue
- Savings
- Improvements to Brand
- Etc

Should be measurable and easily reported on

ROI should be as rigorous as possible. (we spent 4 weeks reviewing our numbers)

## Cost - Identified a revenue based ROI



Used existing sales funnel data

Directly mapped impact of our recommendations to specific parts of the funnel

For example: One part of the sales funnel was the % of site visitors viewing product pages. We focused many recommendations on ways to increase this percentage. Recommendations included infrastructure, workflow, and site design components

Reviewed and validated results with multiple stakeholders during the process

Result was a multi-million annual ROI in increased revenue

Identified areas where customers were frustrated with the online experience

- Frustrating experience finding and comparing products
- Difficulty surfacing expertise

Identified areas where infrastructure was not optimized to get it message and vision out in timely fashion

Overview of how the problem is going to be solved or the opportunity realized

Includes:

- Types of IT, workflow, site design changes to be addressed
- Scale of changes
- Prioritization of Recommendations
- Impacts to business

Should mention the types of key performance indicators for the project



Prioritization of recommendations

Identification of resources required

- Staffing
- Governance
- Hardware and software required
- Loose time line or level of effort estimate

## Recommendations

- Create infrastructure to better support the creation and management of relationships between all offerings (products and content)
- Long term strategic plan for information management which includes
  - The data to be managed
  - Increased re-use of product categorization and metadata definitions
  - Systems required to support the information management
  - Short term and long term staffing models, and work flows
  - Address short term wins already identified

- Increased revenue caused by a larger number of people getting to product pages
- Reduced involvement of developer/production resources in updating of content or relationships between content
- Reduce the number of customers leaving the site because they could not find what they were looking for
- Increase in the number of paths that a customer can take to get to products

- Resources were made available including full time Program Manager
- Customer put full support into project, from the director to the individual contributors
- People were able to see their input in the draft and final documents
- Widespread understanding of what needed to be done
- Provided targeted summaries to different groups (IT, Executives, Marketing, Online, Production, etc)
- Well defined methodology gave people confidence in results

- Widespread acceptance of the Business Case eased acceptance of other deliverables – most notably the Recommendations document
- This approach socialized the project across the organization, helped minimize political landmines by building credibility up front
- Implementation of many of the recommendations was funded (Fall 2009)
- IT heavily invested in moving forward with the project

Identify the business problem at the start of any project

Gathering requirements surrounding information management is a huge process and can lead to many different areas of an organizations

Align your projects with the business and preferably with revenue, rather than efficiency

Have Fun

# Final Advice

1- Follow the money

2- Follow the money

3- Follow the money

## Checklist:

Document exactly how information supports the business

- ROI
- Legal requirements
- Brand management
- Customer Satisfaction
- Business / Financial reporting

Get involved with the marketing team



Questions?

Thank You!

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