

Making the Case for Business Taxonomy

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Abstract

This paper defines potential returns that may come from the consideration, design, and implementation of a business taxonomy at the outset of your organization's information management initiatives. The paper discusses the benefits a well-designed business taxonomy may offer to your users for the storage and management, findability, and overarching interoperability of information and information systems.

The Evolution of Information Management

Over the last decade, vast amounts of information have flowed from individual sources such as personal hard drives, file shares, and hard copies into electronic repositories, including portals, intranet websites, and document management systems. With these content migrations, the management of this information has changed drastically. As many of these online systems are owned and managed by "average" business users, the responsibility for the proper placement and tagging of content shifted from a small group of librarians and information professionals to a much wider pool of content managers. This democratization of content management has yielded significant benefits. Information is generally more accessible and more readily shared. However, it has also commonly resulted in mismanaged content placed in areas that are unintuitive for users or subjected to incomplete or inconsistent tags, making it difficult for users to find.

Business taxonomy design surfaced as a simple answer to address these issues as it is driven by the actual end users. The business taxonomy focused on the organization and categorization of content to make it simple and intuitive for end users. Additionally, end users aided in the creation as they were asked to apply tags to the content. If designed correctly, the business taxonomy gave content managers a powerful, intuitive tool to better categorize their content. More importantly, all end users received the means to simply and quickly wade through information available to them to find exactly what they seek.

The business taxonomy concept dictates that system designers identify metadata fields based on the primary means by which content should be categorized (e.g., topic, audience, location, document type, managing department). A separate taxonomy of these metadata values then is defined to populate each field. If the same care for intuitive design is put in place for each additional metadata field and its associated taxonomy of values, the end result will be a comprehensive, yet inherently simple, strategy for end-to-end information management, retrieval, and interoperability.

Business taxonomies have quickly gained traction within many organizations as a key component of information management projects. However, there are still those that remain unconvinced or unwilling to invest the proper resources in the design of business taxonomies. Some organizations myopically balk at the necessary investment of time and resources required for an effective taxonomy design that captures the categorization and usability needs of end

users. As a result, some organizations invest millions of dollars in information management technologies without investing in the appropriate categorization that will make the search and browse capabilities truly functional. This paper will make the case for business taxonomy, by explaining the benefits it offers to any information management effort.

Business Taxonomy for Storage and Management

A business taxonomy can and should be used as the primary storage design for an organization's content. Organizing all content using the same core design strategy supports the interoperability of systems by having them share a single design. The potential benefits of having various structured and unstructured information sources able to relate common topics and types of information is virtually limitless. For instance, a database user will be able to find documents or tacit collaboration information on the very same topic he/she was querying from the database. Equally, someone reading an article will be linked directly to specific statistics on the same topic stored in a database. Moreover, by organizing all corporate knowledge in a single manner, the overall usability of an organization's knowledge systems drastically increases. Users will no longer be asked to learn the organization of one system only to find they must learn a completely different design for the next tool.

Using a consistent business taxonomy for content storage also helps organizations understand the information they have as well as the information they lack by shining a light on areas that are under-populated or otherwise lacking in content. Equally, by collocating like information within a single taxonomy design, organizations will be able to leverage related information that previously was divided into separate areas of management or between completely different systems.

Furthermore, using a business taxonomy for storage allows content owners and managers to benefit from the simple and intuitive designs that such a structure offers. Whereas standard information repositories are often organized both inconsistently and counter-intuitively, a business taxonomy design is characterized by simplicity, with common business language and clearly defined usability constraints, including minimal depth and breadth. When business taxonomy designs are applied as the primary storage structure for corporate information, content owners and managers typically respond positively. Both the amount and quality of content should increase, as well as the consistency of content placement within the system.

Business Taxonomy for Findability

A business taxonomy has the potential for an even greater impact on the effective retrieval of content, or findability, by end users. All end users can be easily divided into either natural browsers who like to "click" through a structure to find the information they seek or natural searchers who prefer to enter a search term and pick the results they wish to explore further. A business taxonomy serves both natural browsers and searchers as it provides end users with multiple ways to access the same information.

For browsers, the business taxonomy may be translated into the core navigation of the site in much the same way that it may be used as the primary storage structure. Surfacing business taxonomy as navigation ensures that the primary site navigation offered will be based in simple and logical design concepts, with usability taken fully into account. More importantly, employing business taxonomy as the foundation for navigation opens the door for more faceted navigation to be enabled in the future. Faceted navigation essentially takes advanced search functionality that allows the user to combine multiple metadata criteria to pinpoint specific content. However,

instead of hiding such functionality in a seldom-used Advanced Search screen, a facet search is surfaced as intuitive navigation, approachable by any end user. If designed correctly, this can provide an extremely flexible and intuitive user experience. Faceted navigation gives each user the option of finding the documents based on their unique criteria. In short, this functionality puts more power in the hands of the end users to define their own experiences. However, a faceted search will only work if consistent tags powered by well-defined business taxonomy have been applied to the content within the system.

As with browse, search can be drastically improved through the application of metadata tags on an organization's content. Virtually every search engine leverages metadata to determine the weighting of search results. With a consistent business taxonomy powering these metadata values, search results can be fine-tuned and refined over time. These additional metadata values can also be used to refine initial search results (similar to the faceted browse discussed above) in order to target the specific content that the end user is seeking.

Conclusion

If business taxonomies are considered at the outset of information management projects, a foundation will be set that will allow organizations to expand and evolve their designs over time. Benefits in the storage and management, findability, and interoperability will grow over time. A disorganized system will be prone to stagnation, limited end user adoption, misuse, and increasing chaos. The relative cost to design and implement a simple business taxonomy pales in comparison to the failure of an effort lacking one. The potential benefits of a business taxonomy are substantial and the returns are immediate. No organization can afford to overlook this critical piece of its information management projects.

About the Author

Zach Wahl leads the Knowledge Management Practice at Project Performance Corporation (PPC). He has led major Enterprise Information Portal deployments for a variety of organizations, including Pratt & Whitney, Columbia University, the Department of Defense (DoD), the International Monetary Fund, and the Department of Energy (DOE). Mr. Wahl has developed his own taxonomy and metadata design methodologies, authored a series of courses on portal knowledge management and development, and is an internationally recognized speaker and trainer on the subjects of eGovernance, portals, and taxonomy design. He sits on the board of the Washington DC Knowledge Management Institute and is the Chairman of IIRUSA's Enterprise Web, Portals, and Collaborative Technologies conference.

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About Project Performance Corporation

Founded in 1991, Project Performance Corporation (PPC), the North American operating arm of the international consultancy AEA, is a management and information technology consulting firm in the business of simplifying complex problems for top government and Fortune 500 decision makers. PPC's Knowledge Management Practice has helped over 160 public and private organizations successfully implement the full lifecycle of portals and other knowledge management tools.

