Taxonomies in Information Management

Taxonomies to support the business

Lessons learnt about knowledge organization

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Taxonomy and metadata as "glue"

Knowledge and Information Management Governance
- KIM Governance involves having an integrated set of policies, processes, and defined roles covering:
  - Information Security
  - Knowledge Sharing
  - Data Management
  - Intranet Content Management and Maintenance
  - Taxonomy and Metadata Management and Maintenance
  - Records Management

Enterprise Search
- Virtual libraries on topics of common interest using taxonomy tags and pre-set search queries to pull relevant documents together
- Faceted Taxonomy to accommodate different perspectives on the content
- Search Clouds showing frequent search terms
- Theaurus containing alternate keywords pointing to taxonomy terms
- Best Bets pointing to high value documents
- Taxonomy governance includes review of search logs and user tags to assess candidates for Thesaurus or Taxonomy
- Use Tag Clouds to show contribution profiles of Intranet users

Intranet
- Information Architecture creates a design for an integrated information space - site structure, labels, page layout, how search and navigation is implemented

EMS → RMS → DMS → CMS → DAMS
- Records Management System
- Document Management System
- Content Management System
- Digital Asset Management System

Can emails be converted into corporate records? Records Management education and awareness
- Records Management Policy
- Records Management Metadata
- File Classification Plan with retention rules
- Digitization - converting paper records into digital format - must include metataggging

Content Migration Plan (including housekeeping)
- File Naming Convention

Master Data Management to harmonize with Taxonomy and Metadata Schema

Dashboard → Web 2.0
- Business Analytics Dashboard
- Blogs, Wikis, Microblogs, Social Tags

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Taxonomy and metadata as "glue"
Taxonomy and metadata as "glue"
Taskonomy: Information in Context
Info Mgr: We want to develop a common taxonomy which we can use to tag all the information that needs to be shared across depts.

CEO: That sounds like a lot of work - everything will have to be re-tagged.

Info Mgr: It will help people find information faster when they need it.

CEO: If I need to get hold of some information, I just call up the relevant person and they send it to me.

Info Mgr: But people don’t always know what information exists, or who has it.

CEO: Just let them see the other depts’ folders.

Info Mgr: But they are all structured and labeled inconsistently.

VP: I think you are exaggerating the problems, we’re doing okay as we are, right? We’re a successful business.
Taxonomy and metadata as "glue"

Knowledge and Information Management Governance

- Intranet Content Management and Maintenance
- Taxonomy and Metadata Management and Maintenance
- Records Management
- Information Security
- Knowledge Sharing
- Data Management

Virtual libraries on topics of common interest using taxonomy tags and pre-set search queries to pull relevant documents together.

Faceted Taxonomy to accommodate different perspectives on the content.

Search clouds showing frequent search terms.

Best bets pointing to high value documents.

Thesaurus containing alternate keywords pointing to taxonomy terms.

Taxonomy governance includes review of search logs and user tags to assess candidates for thesaurus or taxonomy.

Use tag clouds to show contribution profiles of Intranet users.

Information Architecture creates a design for an integrated information space - site structure, labels, page layouts, how search and navigation is implemented.

Metadata Schema (including the taxonomy facets) provides the capability to integrate, manage and access content from multiple sources.

Intranet

EMS
- Email Management System
- Can emails be converted into corporate records? Records Management education and awareness

RMS
- Records Management System
- Records Management Policy
- Records Management Metadata
- File Classification Plan with retention rules

DMS
- Document Management System
- Digitization - converting paper records into digital format - must include metadata tagging

CMS
- Content Management System
- Content Migration Plan (including housekeeping)

DAMS
- Digital Asset Management System
- Master Data Management to harmonize with Taxonomy and Metadata Schema

Dashboard
- Business Analytics Dashboard

Web 2.0
- Blogs Wikis Microblogs Social Tags

Enterprise Search

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Lessons learnt about knowledge organization

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Our Business Environments

Complex

Chaotic

Knowable

Known

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What Taxonomies Do

1. Structure & organise
2. Common ground
3. Span boundaries
4. Sense-making
5. Discovery, visibility

Complex

Chaotic

Known

Knowable
Taxonomy Strategies

1. Structure & organise
   - Reuse operational and standard taxonomies
   - Negotiate based on implicit and private taxonomies

2. Common ground
   - Known
   - Trees
   - Facets

3. Span boundaries
   - Use thesaurus to map variant terminologies

4. Sense-making
   - Complex
   - Knowable
   - Maps

5. Discovery, visibility
   - Chaotic
   - Constant ‘disposable’ taxonomy building

TAGGING

Build multiple, simple typologies
- frameworks, matrices

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Four Taxonomy Projects

Sheldon - News Content

Jane - Image Management

Pam - Online Store

Hugh - SharePoint

http://www.aiim.org/Training/Certificate-Courses/Taxonomy-Metadata/Overview
Taxonomies in Information Management

Taxonomies to support the business

Lessons learnt about knowledge organization
Organizing Around Knowledge

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Organizing Around Knowledge

SLA Conference 2013 - Mon June 10 - #slataxo 17
Organizing Around Knowledge

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Classification Isn’t Organization

The taxonomy I created was totally Z39.19 compliant, gorgeous, comprehensive, informative, fully reflecting the authoritative info source.

The only problem was that it was presented entirely differently from the way the domain pros conceived of the information. I remember a disbelieving question: “what is this?”
Yes Doesn’t Mean Yes

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Book Signing 2pm

Book Signing with Patrick Lambe

Book signing with the author of Organising Knowledge: Taxonomies, Knowledge and Organisational Effectiveness, Patrick Lambe, Partner, Straits Knowledge.

Monday June 10, 2013 2:00pm - 2:45pm
Convention Center, Social Media Lounge

Presented By SLA