



Spotlight On

Taxonomy Strategies

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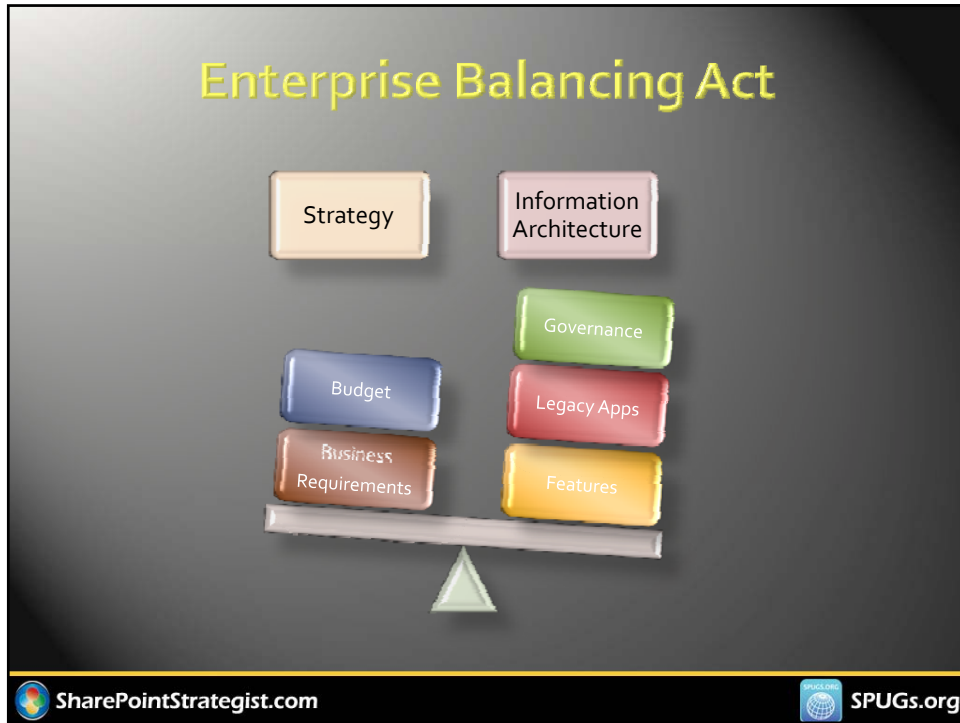
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About Me

- ▣ Technology professional with 18 years experience in integration, project management, custom application development, visual production and corporate training.
- ▣ AIIM Certified Enterprise Content Management Practitioner
- ▣ Currently IT Project Manager & SharePoint Architect for Skechers USA, a global footwear manufacturer
- ▣ Principal Enthusiast at my blog SharePointStrategist.com
- ▣ Vice Chair of SPUGs.org, non-profit dedicated to promoting SharePoint User Groups
- ▣ 12 Years as a content management specialist for legal and government industries

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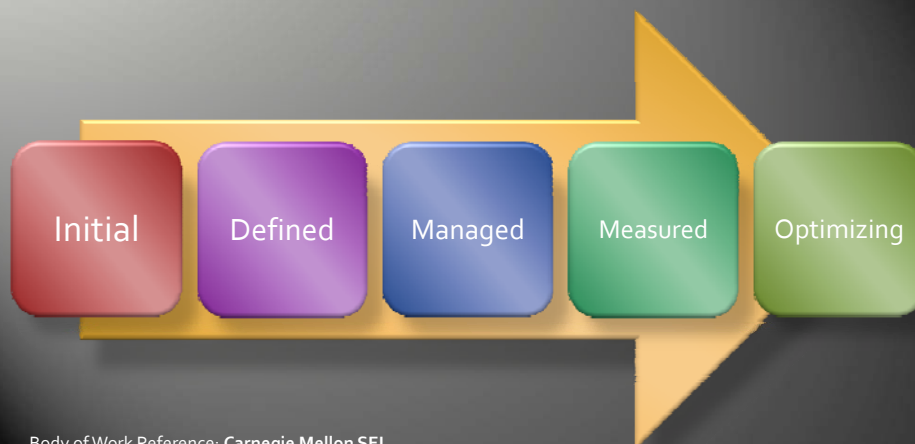
- ## Common SharePoint Issues
- ❑ Search does not return relevant results
 - ❑ Folders hide relevant information; not named well
 - ❑ People do not take time to implement governance & taxonomy in advance
 - ❑ Business users and IT do not value the same functionality and face communications and policy challenges as the system expands
 - ❑ Resistance to change
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Taxonomy for Business Users

Taxonomy: The practice and science of classification

- Taxonomy originally created for librarians
 - Dewey Decimal System, created 1876 by Melvil Dewey
- Hierarchical or parent/child relationships
- Adult mind works this way naturally
 - Precursor to pattern recognition
- Business environments have different needs
 - Sector specific terminology
 - Retail vs. Legal; Government vs. Entertainment
 - User friendly language
 - Distributed management techniques

CMMI: Capability Maturity Model



Body of Work Reference: Carnegie Mellon SEI
<http://www.sei.cmu.edu/cmmi/general>

Where are you at?

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      A[No Taxonomy] --> B[Understand Need]
      B --> C[Design & Develop]
      C --> D[Implement]
      D --> E[Managed Taxonomy]
  
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- ❑ Understanding the need requires continuing education on taxonomy implementations and your business
- ❑ Who will sponsor the project? Recruit executive leadership
- ❑ Implement at division or group level first – run a pilot project!
- ❑ Define management & update policies in advance

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Types of Taxonomies

Method	Definition
Facet-based	Information categorized into multiple taxonomies or “stackonomies” based on unique characteristics including topic, function, etc. (Common on shopping sites)
Subject-oriented	Information categorized by subject or topic.
Functional	Information categorized by the process to which it relates
Organizational	Information categorized by corporate departments or business entities.
Document Type	Information categorized by the type of document

Collaborative Resource: Bill Williams

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Taxonomy Committee

- ❑ Requires a taxonomy cheerleader as well as technical specialists
- ❑ Cross functional team for most valuable input
- ❑ Useful to have professional facilitation or skilled communicator for leadership
- ❑ Initial suggestions can be crafted in a small group and circulated for input
- ❑ Give people a visual representation of usage

The Right Resources



Steps for Success

- ❑ Create your core team – define roles
- ❑ Understand your existing data structures, taxonomies (official/unofficial)
- ❑ Map usage & success of existing tools
- ❑ Determine pilot test group
- ❑ Design & develop
 - Select taxonomy type
 - Document and review with business users
 - Populate with content
- ❑ Launch, train, repeat

Facts from the Field

- ❑ Good taxonomy will foster user adoption
- ❑ Integral part of governance strategy
- ❑ Required for best practices implementation of search and life cycling
- ❑ Creation process fosters collaboration across the enterprise
- ❑ Assists user community to think of data as owned by the enterprise not individual “tribes”
- ❑ It is never “done”

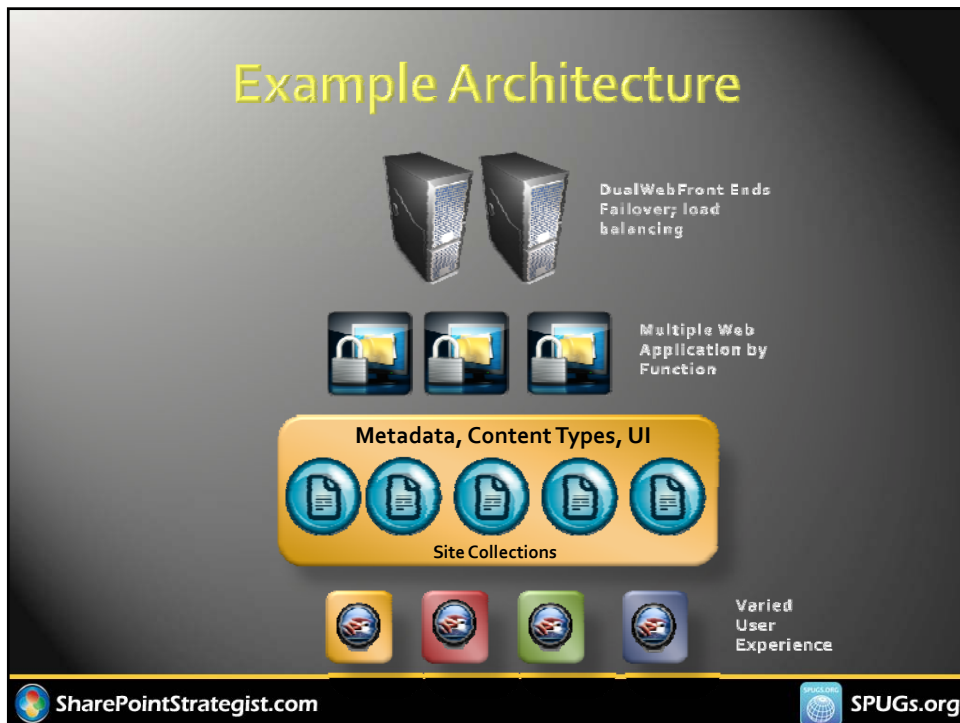
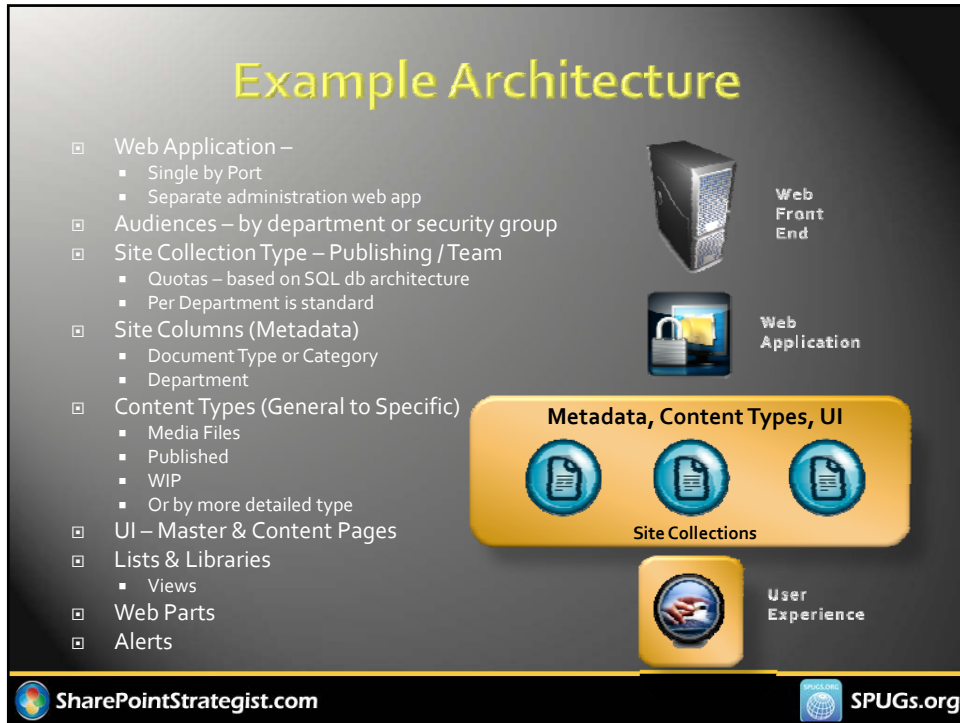
Design Considerations

- ▣ **Taxonomy** - How you classify data as expressed through:
 - Database & web app design
 - Content types
 - Custom columns
 - Other metadata
- ▣ **Legacy Integration**
 - Links to external databases & other LOB apps
- ▣ **Data Conversions**
 - Unstructured to Structured Data
 - File Stores

Compliance & Governance

- ▣ Information retention policy
 - Document & data life cycles
- ▣ Legal (litigation & other requirements)
- ▣ Executive management review/approval
- ▣ Enterprise change management policies
- ▣ SOX
- ▣ HIPPA

Each consideration can be handled by defining metadata with associated workflows, audit trails, publishing sites, content expiration and a taxonomy that identifies the owners & categorization of content.



Resources

- ▣ Microsoft TechNet
 - Architecture & Deployment tools
- ▣ MVP Community – Twitter, Blogs
- ▣ My Blog: SharePointStrategist.com
- ▣ Peers & User Groups
- ▣ Training