



**DESIGN AND MODELING OF
INFORMATION AND EXPERIENCES**

**Using Taxonomies and Metadata
to Deliver Multi-platform Content
from your DAM Systems**

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Gary Carlson

@gcc_taxonomy

gary@factorfirm.com

factorfirm.com

Agenda

Introduction

Technical Content Strategy Overview

Information Model

Example

Wrap up

Overview:

Gary Carlson and Factor

Gary Carlson has recently merged his consulting practice into a company called Factor. Under Factor, Gary will continue to provide taxonomy and information management consulting services along with an expanded focus on the intersection between Information Modeling and User Experience.



Our primary offerings include:

- Taxonomy Development, Governance, Integration and Maintenance Strategy
- User Experience Strategy and Design
- Information Infrastructure Analysis
- Training and Best Practices Workshops
- Request for Proposal Development for Taxonomy/Ontology Tools

Partial List of Past and Current Clients



PEARSON

sears



UW Medicine

Microsoft



First, a few questions...

Technical Content Strategy Overview

Technical Content Strategy

The many elements of Content Strategy can be divided into two general areas, ***Editorial Content Strategy*** and ***Technical Content Strategy***.

Content Strategy	
Editorial	Technical
Message and Voice	Taxonomy / Metadata Design
User Experience	DAM / CMS Strategy
Content Creation	Search Implementation
Content Approve / Release	Systems Integration
Search Strategy	Performance Optimization

Multi-Channel Content Delivery

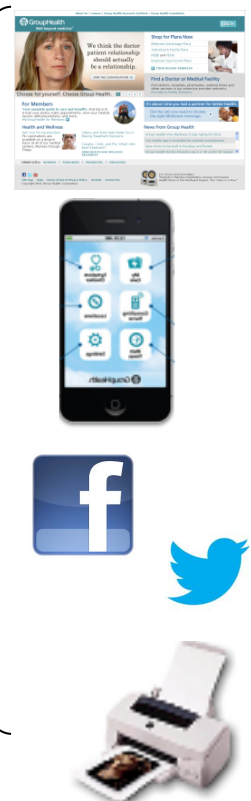
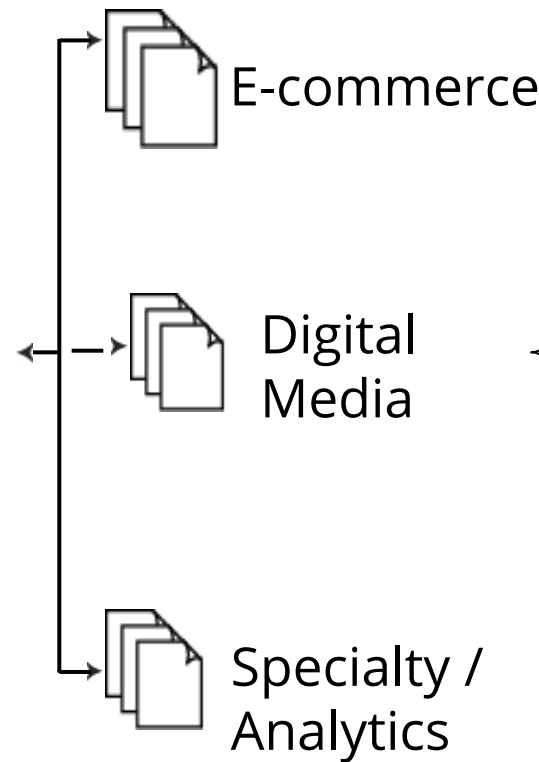
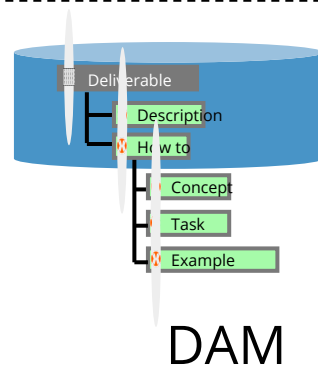
CREATE

ORGANIZE

TARGET

DELIVER

Capture
Creation
Approval
Revision
Etc.



Information Model

Governance

Rights Management

IP

Technical Content Strategy in DAM

Business goals

Assessment

- Information models
- Technical Infrastructure (DAM and related systems)
- Governance Requirements
- Identifies and supports key metrics and analytics
- Viable near term projects

Roadmap - Sustainable over time

Information Model for the DAM

- Information model is designed to support and be compatible with the DAM and related systems
- Supports key workflows and system integrations
- Supports regulatory and compliance requirements
- Supports multiple business cases and scenarios

Provides a governance and maintenance plan that provides transparency across the organization

The Information Model

Information Model Definition

This is a codification of a company's expertise as it relates to products, customers, workflows, business constraints, etc.

Taxonomies and attributes are designed to bridge the gap between content and customer

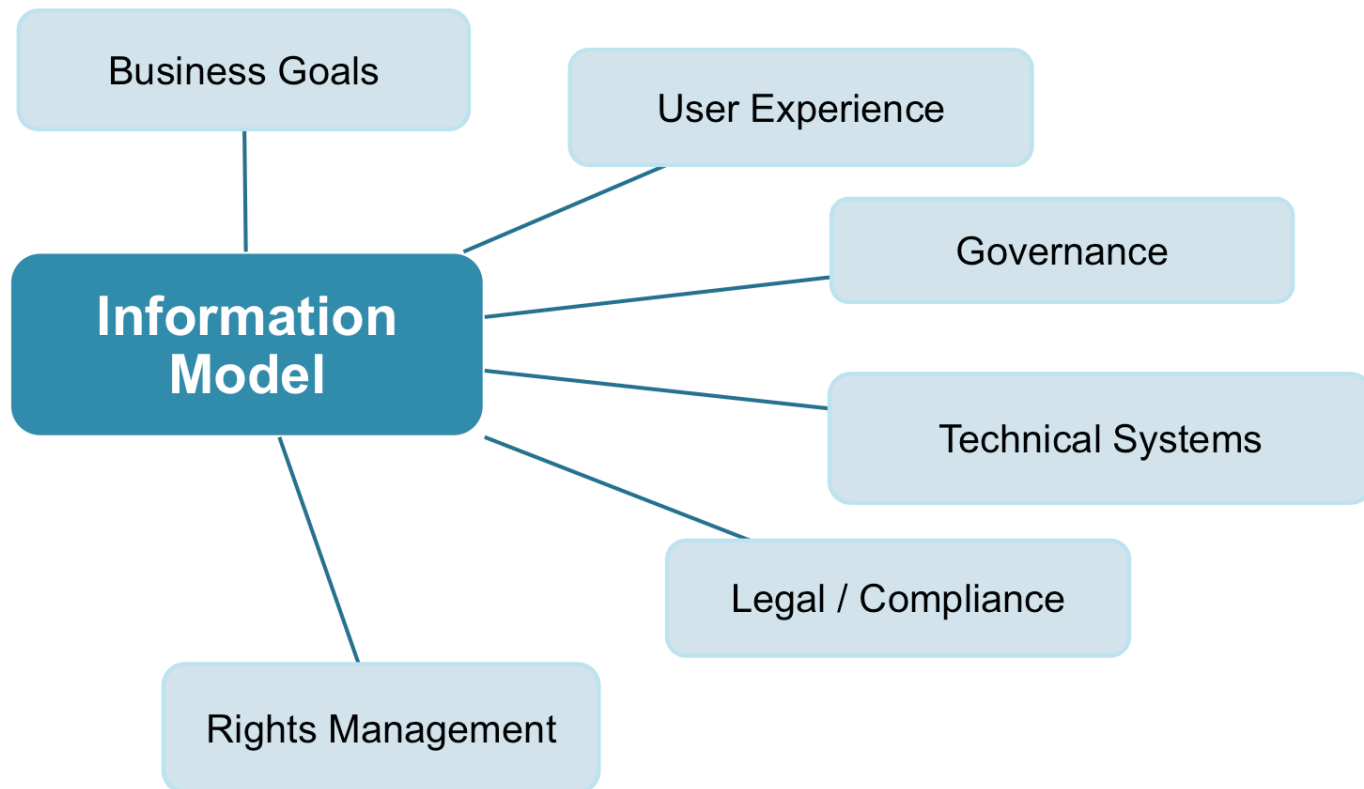
Bridges the gaps between systems and business units

Directly supports revenue, brand health and operational efficiency

This is an essential corporate asset that requires:

- Tools to support it
- Staffing to maintain it
- Governance procedures
- Visualization tools

Information Model for the DAM



Role of the Information Model

Information model support of the initiative

- Do all the taxonomies/metadata exist and are they up to date?
- Is the appropriate governance in place to keep them up to date?
- Does the content and design of the taxonomies support the use cases?

Information model support for the experience

- Are the taxonomies at the right level of granularity?
- Are the taxonomy terms presented in a way that people can understand?
- Language, Technical level, Geographically or culturally relevant?

Particulars of the Information Model

All or a subset of the following are required for the successful execution of a Technical Content Strategy

Metadata

System and integration
requirements

Maintenance Plan

Content Types

Taxonomies

Workflows

Governance Plan

What We Have Seen

Today's As-Is and the Challenges it Represents

Strategy driven by technology / information limitations

Hardwired (systems, publication, integrations, etc)

Single platform delivery

Inconsistent use of the Information Model (or multiple models)

Ad hoc workflows with little transparency

Lack of organizational readiness

What Marketing, IT, etc. Want Today

The evolving industry vision of multiplatform delivery and the shift to multiple platforms / screens...

Information as a service

- independent of source systems
- available programmatically

Flexible & Nimble delivery – Channels, content types, targets

Flexible & Nimble management

Information re-use – Consistency, lower costs

Transparency into all stages of the cycle

Gaps

No single view of the information

Lack of transparency and governance for both the information and the information model (taxonomies, metadata, etc)

Poor organizational alignment

Project or division perspective versus an enterprise perspective

An Implementation Methodology

ASSESSMENT

SPECIFICATION

IMPLEMENTATION

Business Goals Review

Content Audit

Taxonomy Audit

Governance Audit

Systems Audit

User Research

Project Goals/Metrics

Information Model

System Requirements

Governance Plan

Capability Plan

Evaluation Criteria

User Experience Design

Search & Navigation Optimization

Taxonomy Building

Auto-Classification & Tagging

Metadata Rules

RFP Authoring

Testing, Training, Workshops

Technologies

Search Text Analytics DAM CMS SharePoint Taxonomy Tools Social Media

An Example:

Retail Multi-Channel Publication

Example Business Goals – Retail & Brand

These are sample success criteria for a project designed to increase on-line sales and average order value for a retailer with strong web and store based sales. Work was primarily focused on the website.

- 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

Overview – Retail & Brand

Problem – Customers coming to the site with intention to purchase products were not getting to product pages. Customers were getting different information on-site versus in-store.

Approach – Enhance Information model to support easier cross linking of products, product information, and other brand supporting information

Solution – Identified key area of the on-line sales funnel and determined how to increase the number of relevant products available to customers

Example – Information Model

Create and manage consistent taxonomies for different product attributes (color, size, material, use, etc)

This required significant changes to internal workflows, resource allocation, and the IT stack

Enhance DAM, CMS and ERP systems to support a common information model (while also allowing them to support their own workflows)

This required a lot of linking of taxonomies rather than standardizing on one.

Company was switching ERP systems at the time so we were able to push some requirements into that process

Example - Workflow

Build tools to support better tagging and application of metadata in basic workflows

Integrate redundant workflows from different business units (part of this required shifts in the org chart)

Provide tools, transparency, and resources to support on-going maintenance of the information model

Model the underlying structure of workflows and design the information and user experience around them

Example – Technology

Create a central system to support the information model

Where there were different systems (i.e. ERP and everyone else) create strong bridges between them

Tie into reporting infrastructure

Push for a central taxonomy management system

Solution

Recommendations

- Create infrastructure to better support the creation and management of relationships between all offerings (product information and other 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

Role of Technical Content Strategy

Identified key areas in the on-line sales funnel where better presentation, re-use, and coordination of information was desirable

Identified and defined the taxonomies and metadata required to support the information

Identified and defined the systems, integrations, and technical processes necessary

Defined the governance and maintenance for long-term support of the information model and surrounding infrastructure

Defined the roles and tasks needed

In General...

Organizational Impacts

Often need to cross business units

- Governance and workflows need to address this
- Lines of communication may not be optimal for an ontology project
- Current processes may need to be broken and re-built

May have impacts on organizational structure
(where does the taxonomist / content strategist live?)

Complexity (and Opportunity)

When designing and executing, plan on the following areas of complexity:

- Information Models
- Technology / System Integrations
- Organizational Alignment
- Workflows
- Governance

Technical Content Strategy Checklist

- ✓ Align with organizational business goals
- ✓ Define measurable outcomes
- ✓ Identify all stakeholders and include them in the process
- ✓ Technical Systems are up to date and flexible
- ✓ Executive Sponsorship identified
- ✓ Cross divisional communication in place
- ✓ Expertise in place
 - ✓ Taxonomy and Metadata
 - ✓ Technology
 - ✓ Marketing / Sales
- ✓ Regulatory and Compliance issues are well understood

Wrap Up

Implementing a DAM system is often complex and expensive.

However, building out the information infrastructure to take advantage of it and operationalize over the long term is an essential ingredient in creating long a sustainable long-term project.

“Knowledge has a value and a discovery cost, each to be counted and weighed”

James Gleick, *The Information*, p 87

Questions?

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THANK YOU!

Gary Carlson
@gc_taxonomy
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