

The Role of Taxonomies in Content Strategy

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This Presentation was developed in conjunction with Bram Wessel from Factorfirm – <http://www.factorfirm.com>

Roles:

- Taxonomist
- Consultant
- Information Strategist

Services:

- Information Strategy
- Taxonomy Management
- Content Strategy
- Taxonomy Assessments and Workshops
- Strategic Planning and Roadmaps



Tags:

taxonomy, information management, content management, knowledge management, e-commerce and intranet, SharePoint, Ontologies, healthcare, finance, etc.

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

- Message and Voice
- **User Experience**
- Content Creation
- Content Approve/Release
- Search Strategy

Technical

- Taxonomy Design
- Metadata Design
- Search Implementation
- Systems Integration
- Performance Optimization



[http://nichewhite.wordpress.com/
2010/07/29/the-yin-to-his-yang/](http://nichewhite.wordpress.com/2010/07/29/the-yin-to-his-yang/)

Taxonomy & User Experience Artifacts



A sample of standard deliverables for from taxonomy and UX projects

Taxonomy	UX - HCD
Taxonomies	Personas
Governance Plans	Experience Maps, Journey Map
Infrastructure Specifications	Prototypes or Wireframes

Using a Human-Centered Design approach to define the UX

User Research – unearthing user needs, motives and goals.

Experience Modeling – using research insights to model user behavior.

Experience Design –deriving experience functionality from user behavior models.

This process culminates in a functional prototype testable with users.

This prototype also provides essential requirements for the Information model

Example – Personas

SUSAN MILLER

PRIMARY USER | Patient Care: a new patient with medical insurance

INFORMATION NEEDS:

- learn about medical condition, symptoms, possible treatments, patient advice, etc.
- find out which UW Medicine facilities / clinics offer services related to heart disease
- find out which physicians work in the heart disease field
- find out how to make an appointment with her preferred physician at her preferred location
- explore any other patient resources that may be helpful to her needs

In the future:

- find out more about billing details regarding her procedure
- prescription refills
- schedule appointments
- pay bills



GENERAL

Female, 50, local

TECHNOLOGY

Intermediate, internet user, social media awareness, preferred platform unknown

PATIENT

New (present and future), health insured, specialty care

UW

No affiliation with UW

This Persona Example is the property of University of Washington Medicine

Common Taxonomies found in personas:

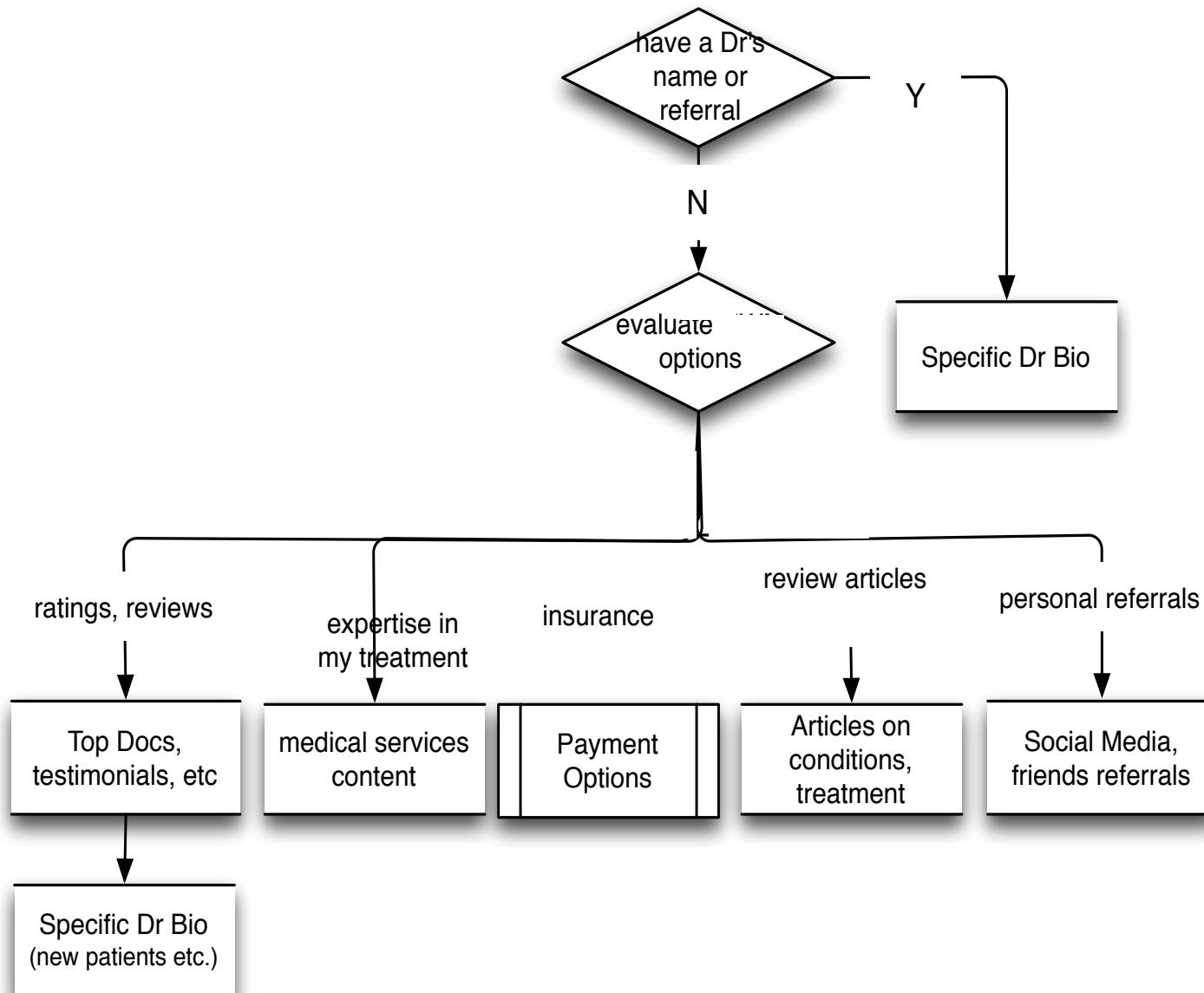
- Stage of life
- Geography / Location
- Specialties
- Types of products / services they desire / interact with
- Areas of interest
- Common channels they interact with
- Technical Level
- User Segment
- Gender
- Goals
- Etc

The taxonomies and how they are going to be used and related are often surfaced in the persona definition

Experience Map

Before Care	During Care	After Care
Affording Care	Appointment & Procedure Preparation	Appointment & Procedure Follow-up
Researching Care	Appointment & Procedure	Future Care
Finding Services		Feedback and Advocacy
Get Support		Billing

Sample Key Path / Interaction Flow



Interactions dependent on information delivery

- Example – Susan was looking for a clinic that focused on “specialty A” near “location B”... Implies that the search tool or clinic locator must be able to utilize a common set of specialties and locations that are used in the other systems as well.

Content types

- Example – “Susan was looking for an FAQ...” Content Type = “FAQ”

Information and relationships and dependencies

- Example – People need to find services by customer goal and location (so the services must be linked to the geography taxonomy and the goals or goals and locations must be linked explicitly)

Frequency of use / or change

- Example – ‘Products are re-branded every year...” taxonomy must allow for product re-naming and track previous product names

Prototype Screen Capture (Wireframe)

[Patient Care](#) [Research](#) [Education](#)

Find Care Learn about conditions and care Find a care provider Make an appointment Get help and support	UW Medicine's Services Regional Heart Center Harborview's Level I Trauma Center Airlift Northwest All Services...	Your UW Medicine Appointment UW Medicine Locations What to expect How to prepare During your visit Following up	Paying for Care Using your insurance Paying your bill Managing costs of care	eCare With eCare you can set up alerts, contact a provider, refill prescriptions and more. <input type="button" value="Log in to eCare"/>
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[Cardiac Services Home](#)
[Conditions](#)
[Treatments](#)
[Care providers](#)
[Your UW Medicine care](#)
[Clinical trials](#)
[Research](#)
[See a list of all conditions and treatments](#)

Conditions

[Mitral Valve Disease](#)²
This condition causes the mitral valve to wear out more frequently than its corresponding valve in the heart's right side.

[Congenital Heart Disease](#)³
At least 1 million adults in the United States have congenital heart defects. They are not typical patients with disease – instead, their problems involve physiological abnormalities of the heart and its blood vessels.

[Coronary Artery Disease](#)¹
Coronary arteries supply the heart muscle with oxygen and nutrition so it can pump blood to the rest of the body. The narrowing and blockage of these blood vessels, commonly called coronary artery disease, is responsible for heart attacks and heart pain (angina).


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Prototype Screen Capture (Wireframe)

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Content Types

Taxonomies

Search requirements

- “search box”
- Search driven content presentation

Content and Taxonomy relationships

Relationships between taxonomies

Taxonomy

Taxonomy – Boring Definition

Collection of terms and relationships between terms used to describe a domain. (And hopefully created to address a real business problem)

ANSI Thesaurus

Traditional BT/NT taxonomy

Controlled Vocabularies

Ontologies

Controlled value lists

Folksonomies?

etc

Terms or relationships may or may not have rich attributes associated with them

Taxonomy – Interesting Definition

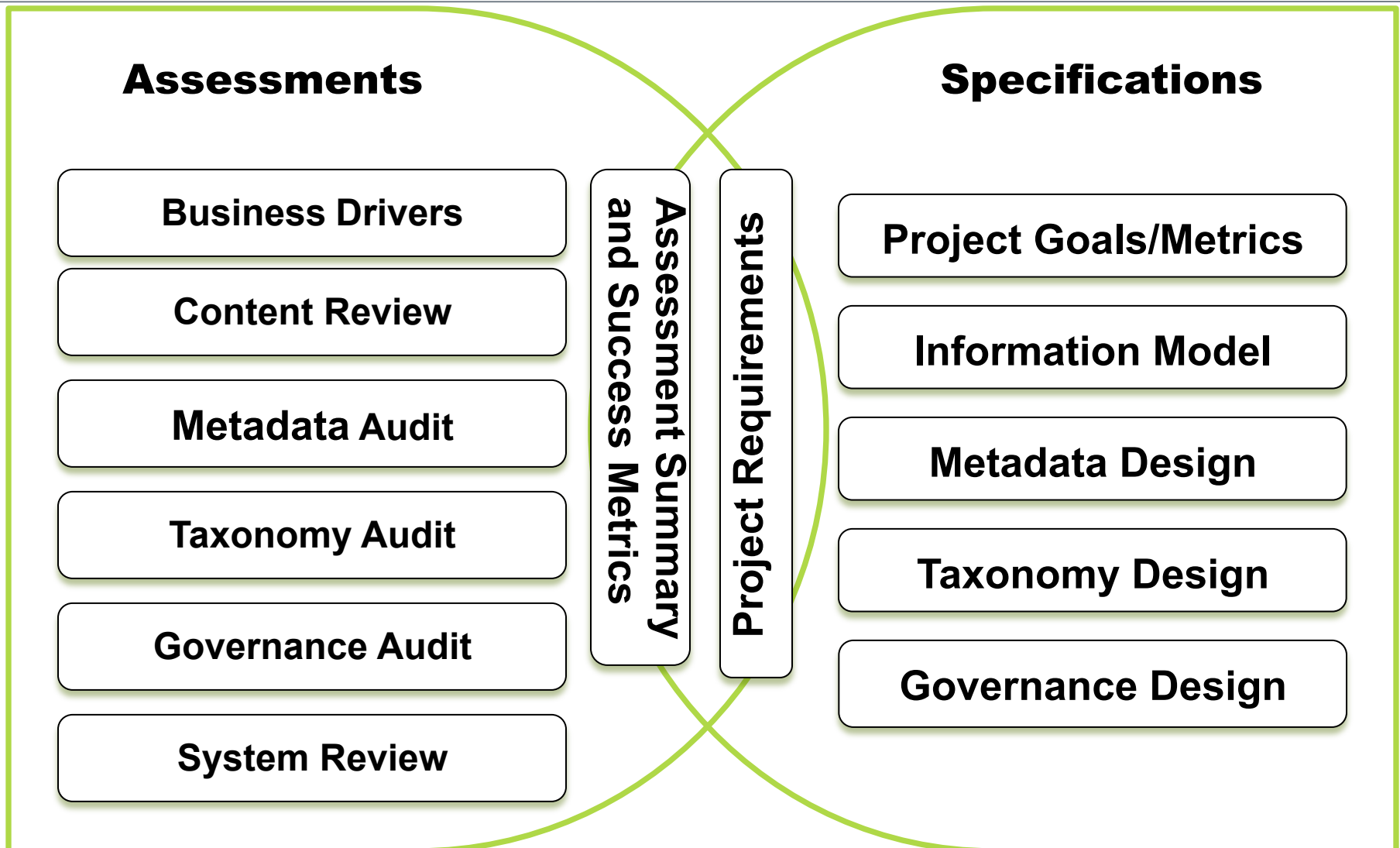
This is a codification of an organizations expertise as it relates to products customers, workflows, business constraints, etc.

Taxonomies and attributes are designed to bridge the gap between information and users of the information

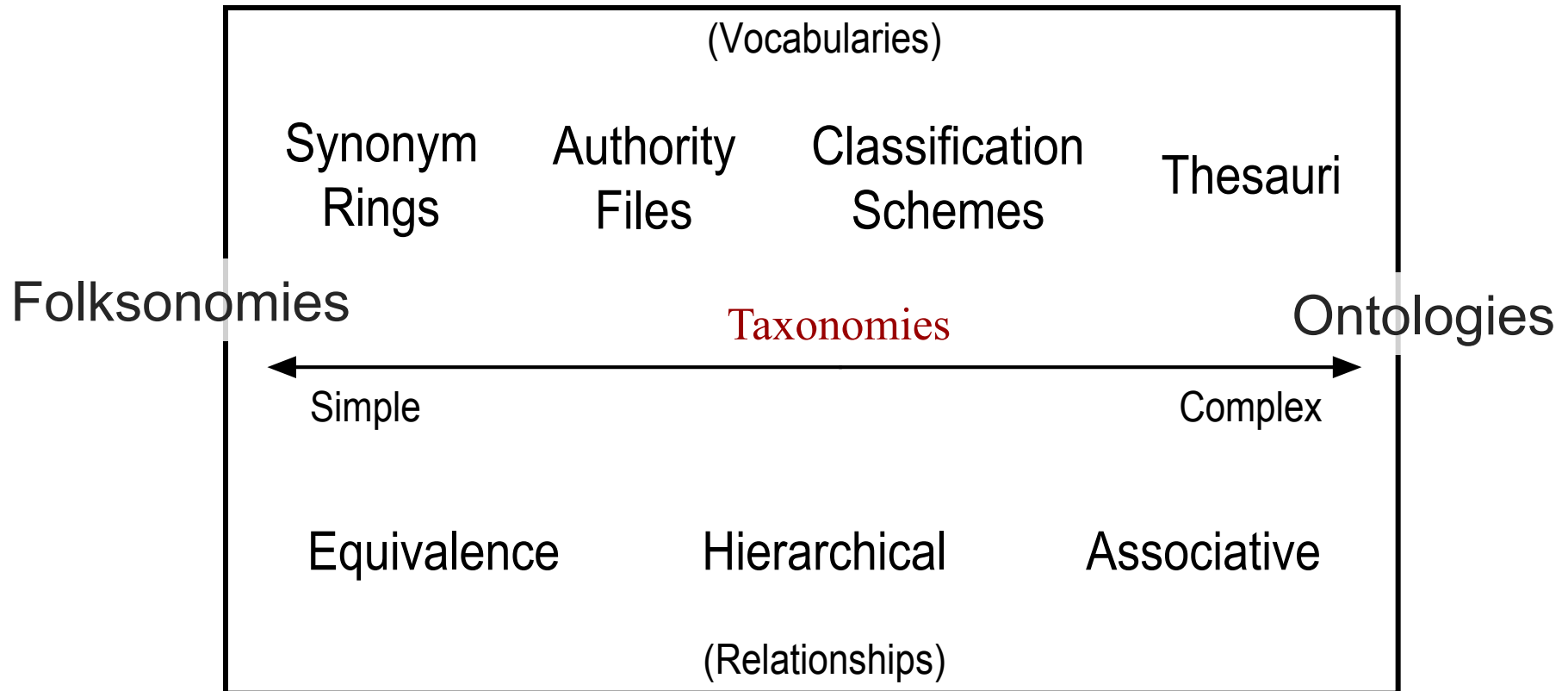
Directly support revenue, brand health and operational efficiency

This is a highly relevant and valuable corporate asset that requires:

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



Structures that may be utilized



From Rosenfeld, L. & P. Morville. (2002). Chapter 9, "Thesauri, Controlled Vocabularies, and Metadata" in Information Architecture for the World Wide Web. 2nd ed. Sebastopol, CA: O'Reilly. (p. 176-208).

Taxonomy – Information Model

Information model support of the user experience

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

Information model support for all the values needed to support 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

Relationships between taxonomies and content modeling

- Are the relationships well enough defined to be applied to the concepts Are the resources (people and technology) in place to maintain the relationships?

Gaps in any of these may have an impact on the user experience that is created

Frequency of update of the taxonomy?

If the taxonomy can only be updated quarterly, for example, it may impact the flexibility of the end experience

Types of changes that can be supported?

Can term names be changed? What other systems are dependent on the taxonomy, as this may impact the change as well

Can the desired relationships between taxonomies and content be managed?

If the technology does not exist to create relationships between taxonomies, products and materials for example, then the user experience will need to take that into account.

Legal/Regulatory constraints?

Legal or regulatory constraints can impact the design work.

Taxonomy – Technical Infrastructure

Can the model be delivered to the consuming systems

Can the infrastructure model all of the requirements

- Synonyms
- Relationships between terms
- Relationships between taxonomies

Are the tools accessible to business users and technical owners

Can updates to the information model be made in a timely fashion (as identified in the UX)

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Example Persona - Details

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Taxonomies:

- Medical Conditions
- Medical Symptoms
- Treatments?
- Medical fields or specialties
- Location
- Goals

Content Types:

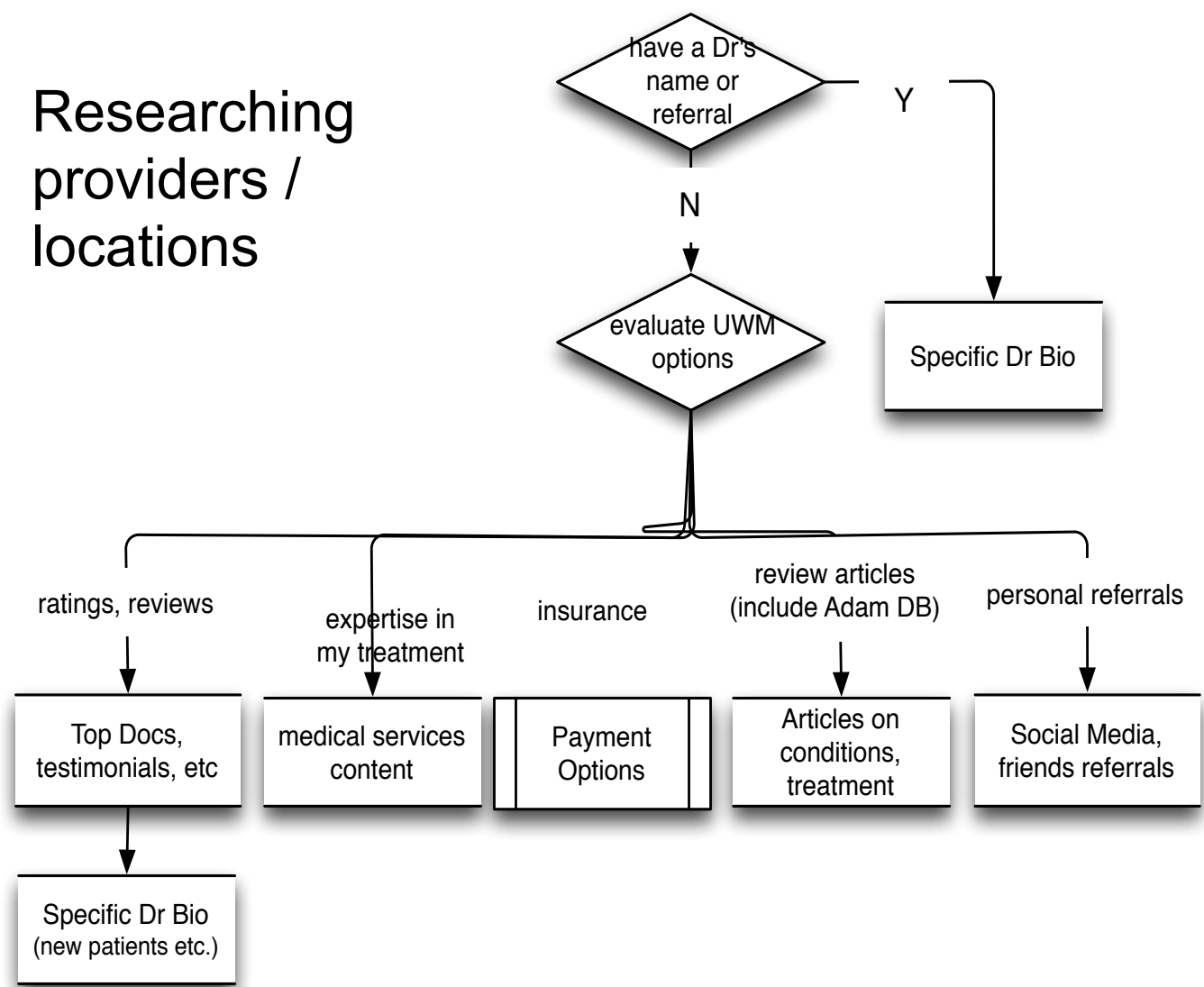
- Patient Advice
- Facilities/clinics
- Physician Bios

Functionality that needs to be supported with metadata:

- Clinic locator
- Search by taxonomies
- Make an Appointment
- Prescription refill

Sample Key Path/Interaction Flow

Researching
providers /
locations



For each doctor the following metadata is required:
Ratings, Expertise, Insurance plans.

Articles by **condition** and **treatment** will be required.

Expertise, conditions and treatment will all need to be related and managed so as to drive consistency.

Clinical trials need to be identified by **condition** and **treatment**. Clinical trials will need additional info about **dates**, and whether or not they are **open** to new participants.

Content Types = Articles, Ratings, Dr Bio, On-line forms

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- The taxonomy / information modeling work and the UX work dovetail very nicely to support Content Strategy.
- One with out the other leaves too many unanswered questions.
- This is an iterative process, both the UX and the information modeling will impact each other.
- Content strategy projects that do not take into account these technical and user experience processes may fail at execution.

Questions?

Thank You

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