Assessment Inputs

The following sections provide an outline of the different assessments we will be using and they include the sample findings we will be using in the exercises.

# Business Goals

**What is it:** Document the business drivers that are behind this taxonomy work. What are the organizational initiatives or goals that the taxonomy needs to support?

**How it helps:** Gives you some direction about the higher level, overall goals of the taxonomy. What qualities does it need to surface?

Sample findings for this workshop:

* Show consumers that we provide high quality, lifetime kitchen products.
* Promote our new Chef’s Star packages of product bundles.
* Deliver consistent information across all our touchpoints.

*Requirements: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

# Taxonomy Assessment

**What is it:**  Review of the existing taxonomies to determine how they support the business goals, if they meet quality standard, and whether they are maintainable and implementable in the technology stack.

**What do you gain from it:** Helps frame the scope of work going forward and often provides a tactical list of quick wins.

Sample findings for this workshop:

* Taxonomy has many duplicate or similar terms
* Taxonomy does not reflect current marketing effort to sell sets of products
* Taxonomy domain is poorly defined: many concepts are not related?

|  |  |
| --- | --- |
| **Business Data Attributes** | **Description** |
| Description |  A description of the existing taxonomy |
| Business Owners | Who will own this taxonomy |
| General structure | Describe the information, including the objects, their attributes and the relationships between the objects |
| System of record | Where the definitive version is stored (sometimes, that may be simply “on the website”, or nowhere!) |
| Amount of data | Number of objects, size of flat file, etc |
| Systems using the data | Systems consuming all or a defined subset of the data |
| Frequency of change (add, modify, delete) | Do the changes occur hourly, daily, weekly, monthly, etc. Also include the timeliness of the updates required by consuming systems |
| Physical structure | How is it currently stored, Relational Database, XML, CSV, other flat file format |
| Change process (Type and scale) | Approval and data validation processes. This may reference a workflow from your workflow assessment |

# Content Assessment

**What it is**: Documents the types of information being used and the different ways the information is bundled, distributed, and categorized

**What you gain from it**: Ultimately the taxonomies will need to support the different ways the information is used, so this is an essential input to the taxonomy design

Sample findings for this workshop:

* Product information does not include the intended use of the product
* Editorial content does not link to product pages
* Current product features are inconsistent across like products
* Products are tagged inconsistently

*Requirements: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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# Technology Assessment

**What is it:**  Documents the the technical capabilities of the organization with respect to taxonomy modeling, management, and integration

**What do you gain from it:** Provides clear understanding of what the current technology can support. This makes it easier to design and build taxonomies that can be easily utilized. Where there are gaps, this can help drive a technology roadmap.

Sample findings for this workshop:

* The CMS can only support 3 levels of hierarchy in the navigation.
* The CMS cannot export the hierarchy.
* Search tool supports synonyms and associated terms.

**Components of a Technology Assessment**

|  |  |
| --- | --- |
| **System** | **Description** |
| Name of system | Name of the system |
| Description | Description of the system, includes overview of the type of information in the system |
| Taxonomy Modeling Capabilities | What can it manage? Hierarchies, lists, relationships, etc |
| Inputs | How can the taxonomy information be added (Manually or programmatically) and can it be done by a business user. |
| Outputs | Capabilities for sharing the taxonomy information |
| Actions | What types of things can be done with the taxonomies - tag content, search for content, drive analytics, etc |

*Requirements: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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# Governance Assessment

**What is it**: A review of the inputs, tasks, roles, and impacts of changes required to maintain the taxonomy so that it meets the needs of all stakeholders

**What do you gain from it:** An understanding of the types of changes that will need to be supported and the approval processes. These have large impacts on taxonomy design.

Sample findings for this workshop:

* Product managers and executive teams need a sales report that shows sales by major product category. They will also need to govern their own teams based on major product category.
* HR team needs sets of taxonomy terms that are not visible and cannot be searched on by other groups in the organization.
* Product categories are managed by the marketing team and are revised quarterly.

**Components of a Governance Assessment**

|  |  |
| --- | --- |
| **For each taxonomy** | **Description** |
| Name of taxonomy | Name of the taxonomy |
| Roles Involved | List of the different job roles that create, edit, manage, approve, or need to be notified in the taxonomy change management process. This should include the primary taxonomy manager and the escalation path for questions regarding large changes |
| Types of Change Tasks | The different classes of Create, Update, Review, and Delete actions that will be required. For example, Create new terms, Update Term Properties, Review and approval processes, Deleting terms or relationships. |
| Frequency of Updates | How often do different types of changes need to be made. *This can have a large impact on the design of the taxonomy* |
| Notifications  | Communication plan for taxonomy changes. |

*Requirements: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

# Quantitative Assessment

**What it is**: Digging through any analytics data you have about the current taxonomy and user behavior around it.

**What you gain from it**: Great for answering specific questions that come up in other assessments. “I wonder what terms people use in our search tool? I wonder how people move through the navigation? I wonder what paths our users take most frequently?”

Sample findings for this workshop:

* Most common types of terms in the query logs were tasks and product names. Also, search terms were different than the navigation terms.
* People bounce in and out of categories when looking for similar items
* Browsing users abandon navigation for search at product list pages

*Requirements: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

# User Research

**What is it:** Qualitative research of your users behaviors and information needs. Can take many forms - generative or evaluative.

**What do you gain from it:** An understanding of user goals and expectations when interacting with the taxonomy, either directly or indirectly.

Sample findings for this workshop:

* Users are interested in activities rather than individual products
* Users associate Brands and Durability with quality. Currently they read reviews to find information about durability.
* Product names in the taxonomy are not familiar to the users

|  |  |
| --- | --- |
| **User Research** | **Description** |
| Taxonomy | The taxonomy the research is addressing (may be more than one) |
| Research Technique | Method of research conducted (i.e., card sort, qualitative, moderated usability, etc.) |
| Targeted Persona | The type of end user the research is directed at. |
| Findings - categorical | Results that impact the definition of the taxonomy, the level 1 terms, or the overall structure of the taxonomy. |
| Findings - detailed | Results that impact the properties or details of the terms themselves, or lower level structures |

*Requirements: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*