



Designing and Building Taxonomies for the Real World

Factor - IA Conference
March 13, 2019

factorTM

INFORMATION ARCHITECTURE, HUMAN EXPERIENCE

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Hi!



Gary
Carlson

Principal, Factor LLC



Dana
Bublitz

Information Architect, Factor LLC

factor[™]

Let's get cookin'.

What happened?

What *is* a Taxonomy,
anyway?

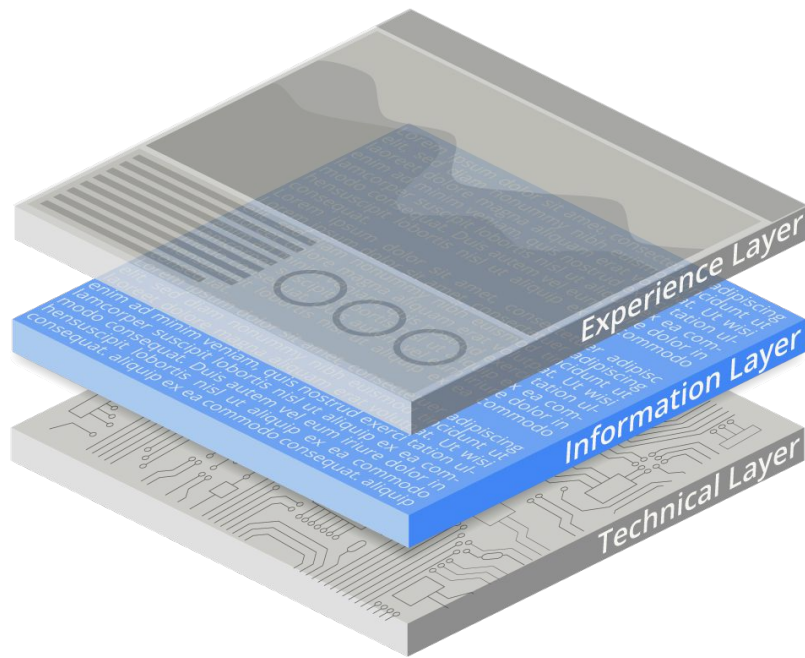


What role do they play in an Information Architecture?

The Experience Layer

The **Information** Layer

The Technical Layer



[Mac](#)[iPad](#)[iPhone](#)[Watch](#)[TV](#)[Music](#)[Support](#)[MacBook](#)[MacBook Air](#)

New

[MacBook Pro](#)[iMac](#)[iMac Pro](#)[Mac Pro](#)[Mac mini](#)

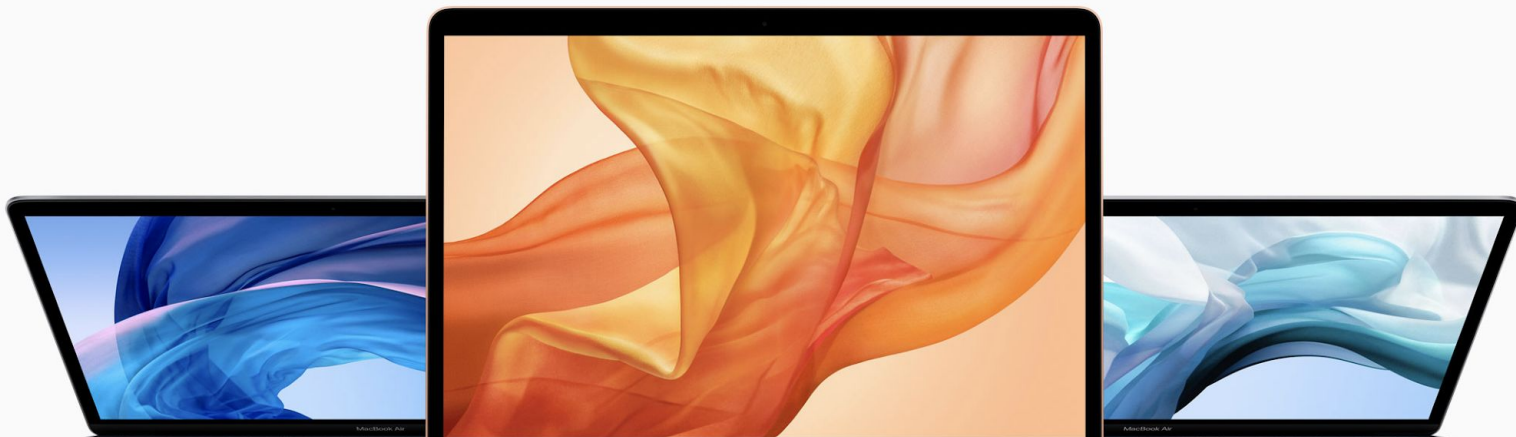
New

[Accessories](#)[Mojave](#)[Compare](#)

MacBook Air

Lightness strikes again.

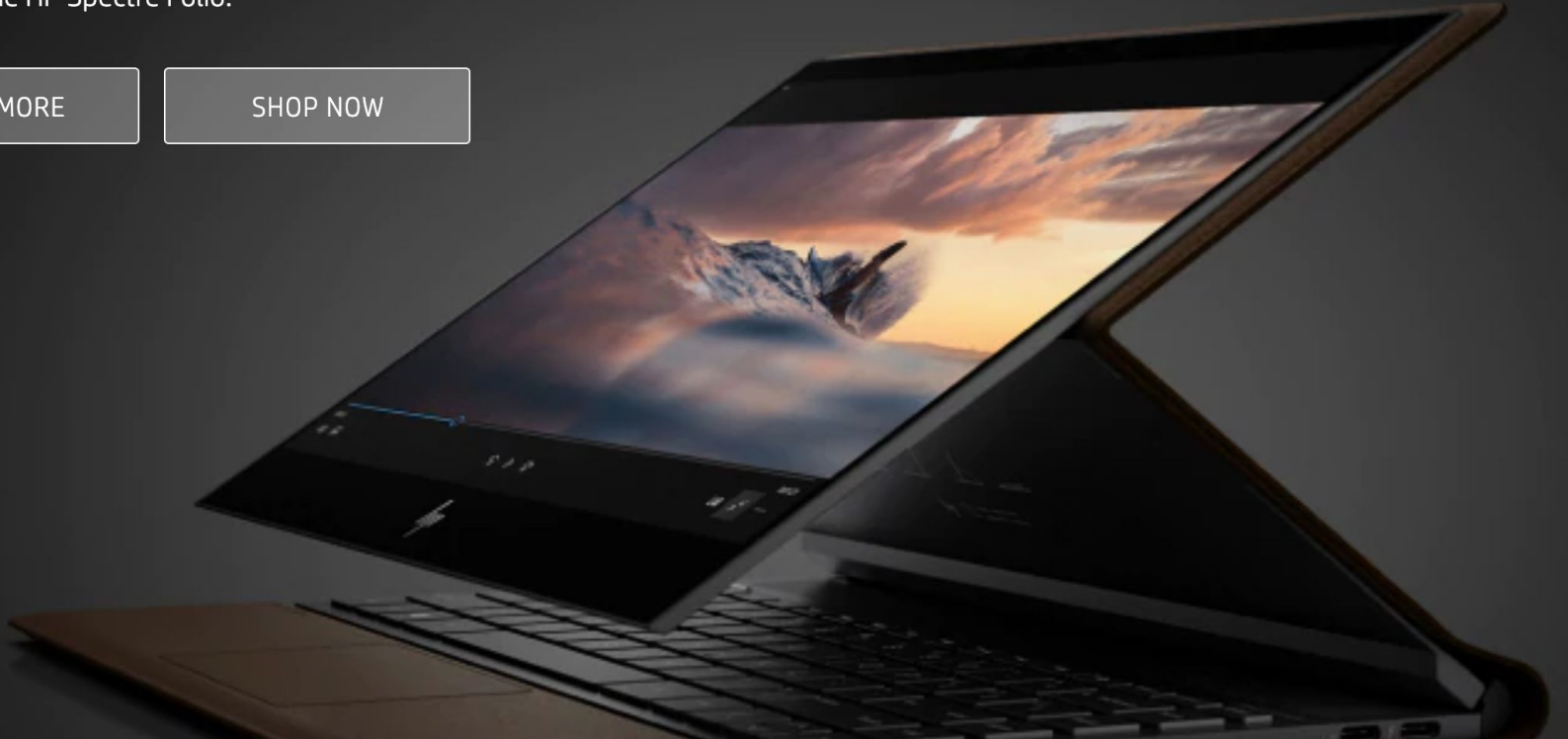
[Learn more >](#) [Buy >](#)



[Laptops & 2-in-1s](#)[Desktops](#)[Printers](#)[3D Print](#)[Ink & toner](#)[Displays & accessories](#)[Business solutions](#)[Support](#)

THE PC. REINVENTED

Introducing the HP Spectre Folio.

[LEARN MORE](#)[SHOP NOW](#)



Laptops & 2-in-1s

Desktops

Printers

3D Print

Ink & toner

Displays & accessories

Business solutions

Support



Business



Immersive



Gaming



Towers



Workstations



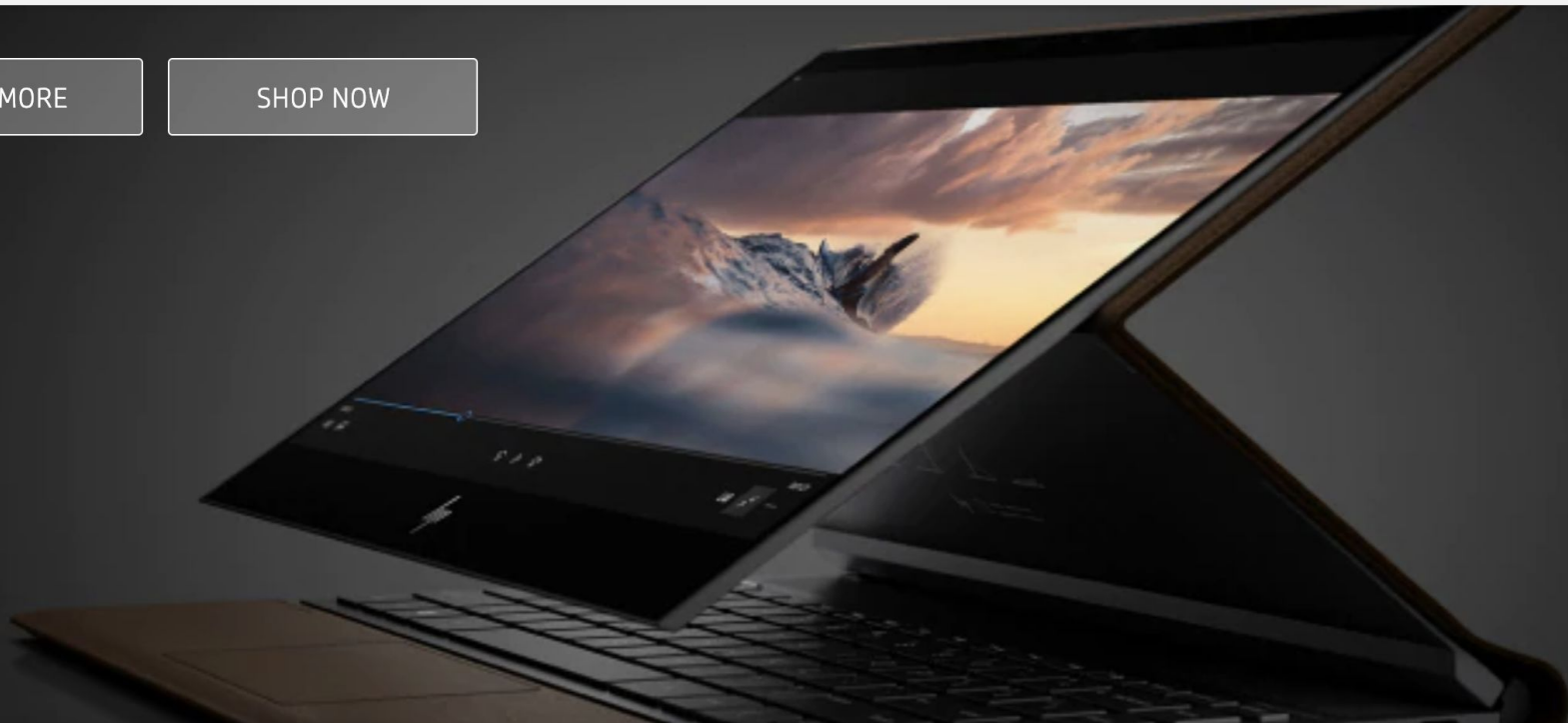
All-in-ones



Deals

LEARN MORE

SHOP NOW

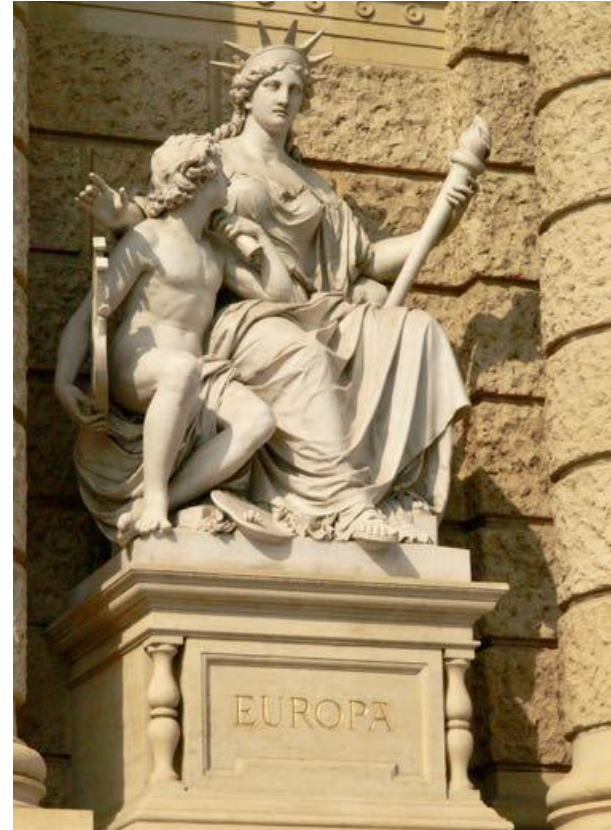


Our categories can say more about us than anything else

Amerika und
Australien



Europa



factor™

Our categories can say more about us than anything else



Cabela's

Hunting
Shooting
Fishing
Boating

...

REI Co-op

Camp & Hike
Climb
Cycle
Paddle

...



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Cabela's CLUB
Cabela's Canada
FAST & FREE 2-DAY SHIPPING
\$50 MINIMUM ORDER
Exclusions Apply

WORLD'S FOREMOST OUTFITTER
Find a Store Near You
Store Flyers
Gift Cards

CHECKOUT
Sign Up or Create Your Account

SHOP
Bargain Cave
Learn
What are you looking for?
SEARCH

Filter
clear all

Availability

- ☐ Available In-Store
- Choose State
- Choose State

Type

- ☐ Backpacking Tents (28)
- ☐ Cabin Tents (16)
- ☐ Caravanning Tents (1)
- ☐ Dome Tents (20)
- ☐ Outfitter Tent
- ☐ Accessories (3)
- ☐ Outfitter Tents (20)
- ☐ Tents (42)
- ☐ Tent Cots (2)
- ☐ Travel Hammocks (1)
- ☐ Truck/SUV Tents (10)
- ☐ Vestibules (1)

Less

Sleeping Capacity

- ☐ 1 Person (7)
- ☐ 2 Person (17)
- ☐ 3 Person (11)
- ☐ 4 Person (10)
- ☐ 5 Person (3)

More

Brand

- ☐ ALPS
- ☐ Mountaineering (20)
- ☐ Browning (1)
- ☐ Backcountry Adventure (2)
- ☐ Cabela's (35)
- ☐ Coleman (4)

More

Price

- ☐ \$50 - \$75 (1)
- ☐ \$75 - \$100 (9)
- ☐ \$100 - \$150 (10)
- ☐ \$150 - \$200 (15)

Camping > Tents & Shelters > View All Tents

Sort by: Recommended Items per page: 15 1 2 3 4 5 6 7 8 Next

Showing 1 - 15 of 106 View:

Cabela's Ultimate Alaknak™ 12-ft. x 12-ft. Tent

★★★★★ (255)

- Sports all the room of a wall tent with extra-tall 4-ft. sidewalls
- Generous 12'L x 12'W footprint sleeps up to six
- 10 perimeter poles and one center support pole
- One large door, angled roof window and three multipanel windows
- Fold-down shelves with patented cup holders and gear pockets

Item: IK-519278

\$899.99

Cabela's Ultimate Alaknak™ 13-ft. x 27-ft. Tent

★★★★★ (255)

- Sports all the room of a wall tent with extra-tall 5-ft. sidewalls
- Generous 13'L x 27'W footprint sleeps up to 11
- 10 perimeter poles, two offset center support poles, one exterior pole
- Two large doors and three multipanel windows
- Fold-down shelves with patented cup holders and gear pockets

Item: IK-519278

\$1,499.99

Cabela's Ultimate Alaknak™ 12-ft. x 20-ft. Tent

★★★★★ (255)

- Sports all the room of a wall tent with extra-tall 5-ft. sidewalls
- Generous 12'L x 20'W footprint sleeps up to eight
- 10 perimeter poles and two center support poles
- Two large doors and three multipanel windows
- Fold-down shelves with patented cup holders and gear pockets

Item: IK-519278

\$1,199.99

Cabela's Alaskan Guide Model® Geodesic Tent with Fiberglass Poles - 6-Person

★★★★★ (529)

- Ultrarugged design was field-tested in Alaska
- 10'8"L x 10'8"W x 6'3"H
- Shock-corded six-pole system adds incredible stability
- One door and an integrated vestibule
- Full-coverage waterproof fly sheds driving rain and snow

Item: IK-517569

\$449.99

Cabela's Alaskan Guide Model® Geodesic Tent with Fiberglass Poles - 4-Person

★★★★★ (529)

- Ultrarugged design was field-tested in Alaska
- 8'6"L x 8'0"W x 4'11"H
- Shock-corded six-pole system adds incredible stability
- One door and an integrated vestibule

\$349.99

SHOP REI
REI OUTLET
USED GEAR
REI ADVENTURES
CLASSES & EVENTS
EXPERT ADVICE
CO-OP JOURNAL
GET OUTSIDE

Search for great gear & clothing

SIGN IN
STORES
CART

Camp & Hike
Climb
Cycle
Paddle
Run
Snow
Travel
Yoga
Men
Women
Deals
More
REI OUTLET

Hey members! Earn a \$20 bonus card when you spend \$100 thru February 18. Details

Find In Store

Select Store

Categories

Backpacking Tents (203)

Camping Tents (87)

Shelters (83)

Bivy Sacks (15)

Hammock Tents (13)

Roof-Top Tents (10)

Shower Tents (2)

Tent Accessories (245)

Sleeping Capacity

- ☐ 1-person (65)
- ☐ 2-person (118)
- ☐ 3-person (70)
- ☐ 4-person (49)
- ☐ 5-person (1)
- ☐ 6-person (26)
- ☐ 8+ people (5)

Brand

- ☐ Big Agnes (150)
- ☐ Kelty (35)
- ☐ Marmot (36)
- ☐ MSR (59)
- ☐ NEMO (54)
- ☐ REI Co-op (65)
- ☐ The North Face (28)

Show All Brands

Seasons

- ☐ 2-season (19)
- ☐ 3-season (294)
- ☐ 3 - 4-season (21)
- ☐ 4-season (26)

Camping and Hiking

Tents (645 results)

View: 30 60 90

Sort by: Relevance


REI Co-op
Kingdom 6 Tent - 2018
~~\$284.93~~ \$439.00
You save 35%
★★★★★ (178)
Compare

5 colors available
REI Co-op
Half Dome 2 Plus Tent
\$229.00
★★★★★ (111)
Compare

2 colors available
REI Co-op
Grand Hut 4 Tent
\$299.00
★★★★★ (37)
Compare

REI Co-op
Passage 2 Tent
\$159.00
★★★★★ (114)
Compare

4 colors available
REI Co-op
Camp Dome 2 Tent
\$74.93 - \$99.95
★★★★★ (83)
Compare

REI Co-op
Camp Bundle
~~\$148.93~~ \$239.00
You save 37%
Total value of items if purchased separately: \$289.85
★★★★★ (236)
Compare

factor

Taxonomy

From **ANSI/NISO Z39.19-2005** – Guidelines for the Construction, Format, and Management of Monolingual Controlled Vocabularies

A collection of controlled vocabulary terms organized into a hierarchical structure. Each term in a taxonomy is in one or more parent/child (broader/narrower) relationships to other terms in the taxonomy.

“Taxonomy for our purposes...”

A collection of terms and relationships between the terms used to describe a domain.

- Thesauri
- Controlled Vocabularies
- Ontologies
- Lexicons
- Controlled value lists
- Folksonomies
- ...and more!

At your tables, generate a few examples...

Taxonomic structures can take many forms

Keywords / Folksonomies

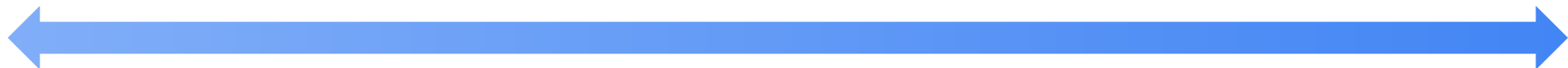
Controlled Vocabularies

Thesauri

Controlled Value Lists

Taxonomies

Ontologies



Less Complex
Fewer Relationships
Fewer Rules

More Complex
More Relationships
More Rules

Taxonomies (looking outward)...

...bridge the gap between **content** and **a user**.

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...represent an organization's **expertise**, **brand**, and **world view**.

Taxonomies (looking outward)...

...bridge the gap between **content** and **a user**.

...represent an organization's **expertise**, **brand**, and **world view**.

...directly support **revenue**, **brand health** and **operational efficiency**.

Taxonomies (looking inward...)

...have **internal customers** (like internal users, backend systems and dashboards).

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...are managed with **change control** and **security** requirements.

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...are managed by **business owners** *and* **technical users**.

Taxonomies (looking inward...)

...have **internal** customers (like backend systems and dashboards).

...are managed with **change control** and **security** requirements.

...are managed by **business owners** *and* **technical users**.

...are a **core organizational asset**.

Taxonomies: Inward & Outward... for discussion

- How does your taxonomy represent your brand?
- What does your taxonomy organize?
- Who are you internal customers?
- What change control is there around your taxonomy?

Getting into the weeds
with taxonomies...

Parts of a taxonomy

Taxonomy Components

Terms/Concepts

Relationships

Attributes

Taxonomy Definition itself

Terms + term attributes

Terms are the concepts in the taxonomy. They will often have Attributes (modifiers or qualifiers) that provide additional context.

Term attributes may include:

- Labels
- Descriptions (scope notes, external definitions, tagging notes)
- ID's
- Dates (creation date, last modified date)
- Term history or origin
- Nearly anything else you can imagine.

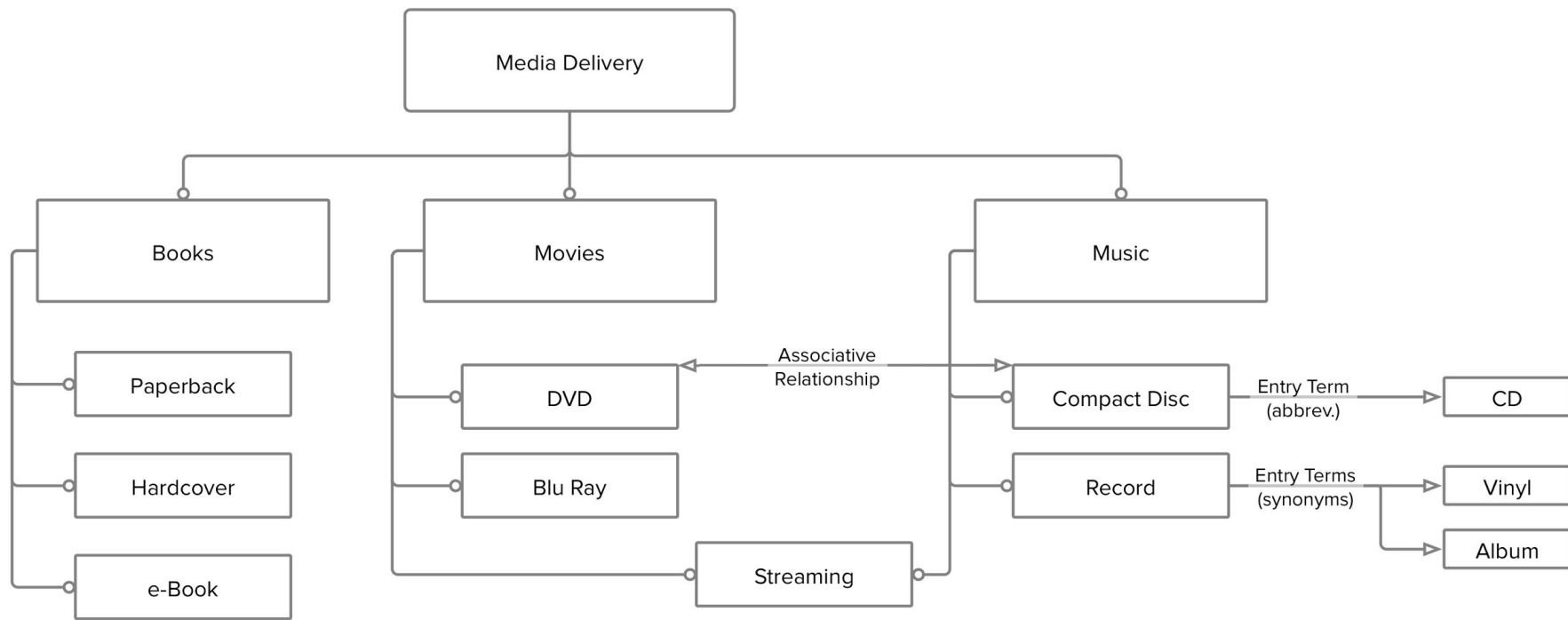
Types of terms

Depending on how they are used, terms can have different functions.

Sample types of terms:

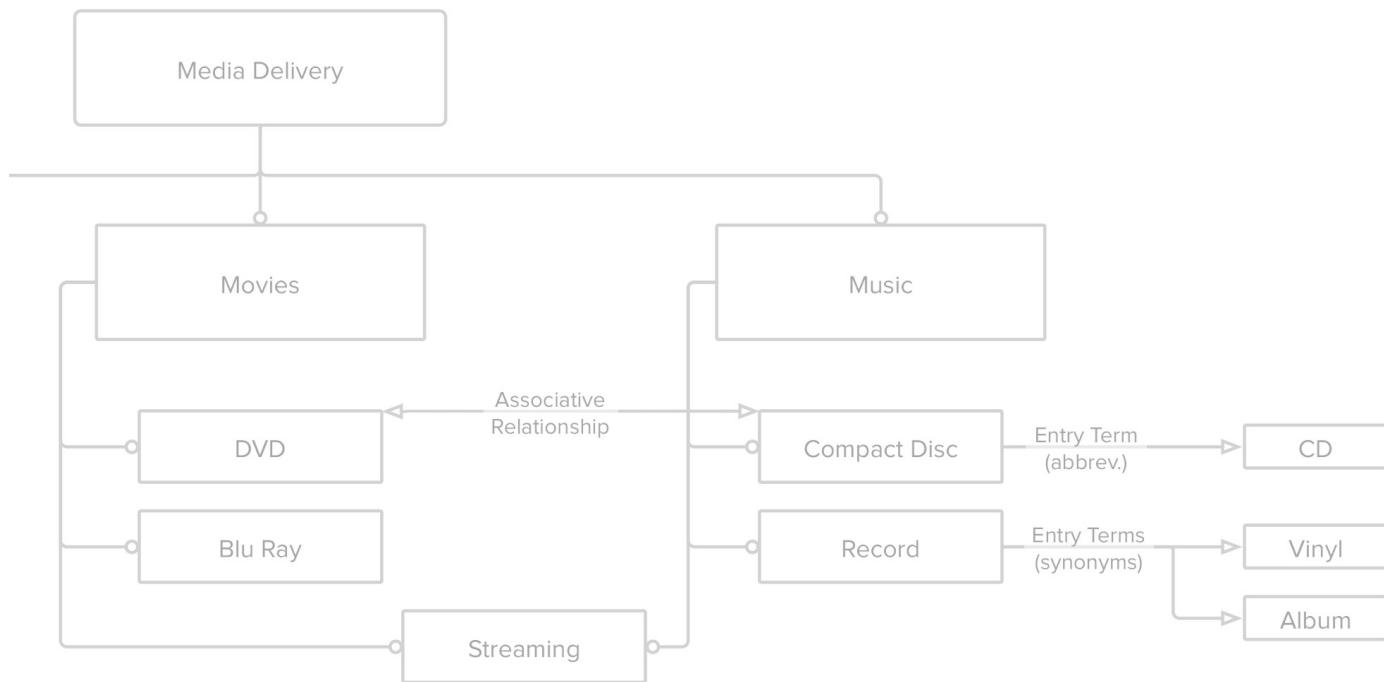
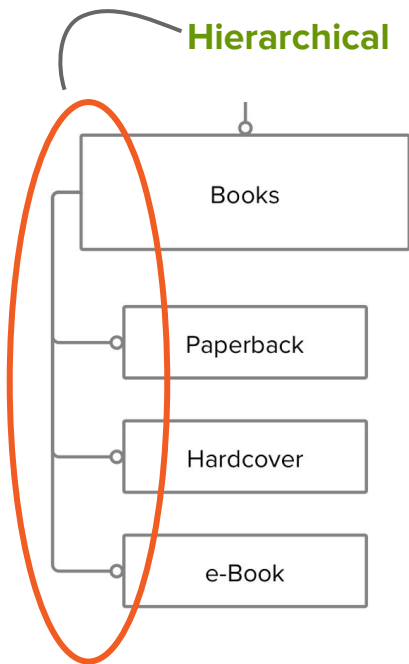
- **Preferred term** - generally used for tagging
- **Entry Term** - synonyms, abbreviations, acronyms. These are directly associated with a preferred term
- **Leaf Node** - a term with no children.
- **Placeholder Term** - often used to provide an important structural component of the taxonomy, even though it would not be used for tagging or other purposes.

Relationships



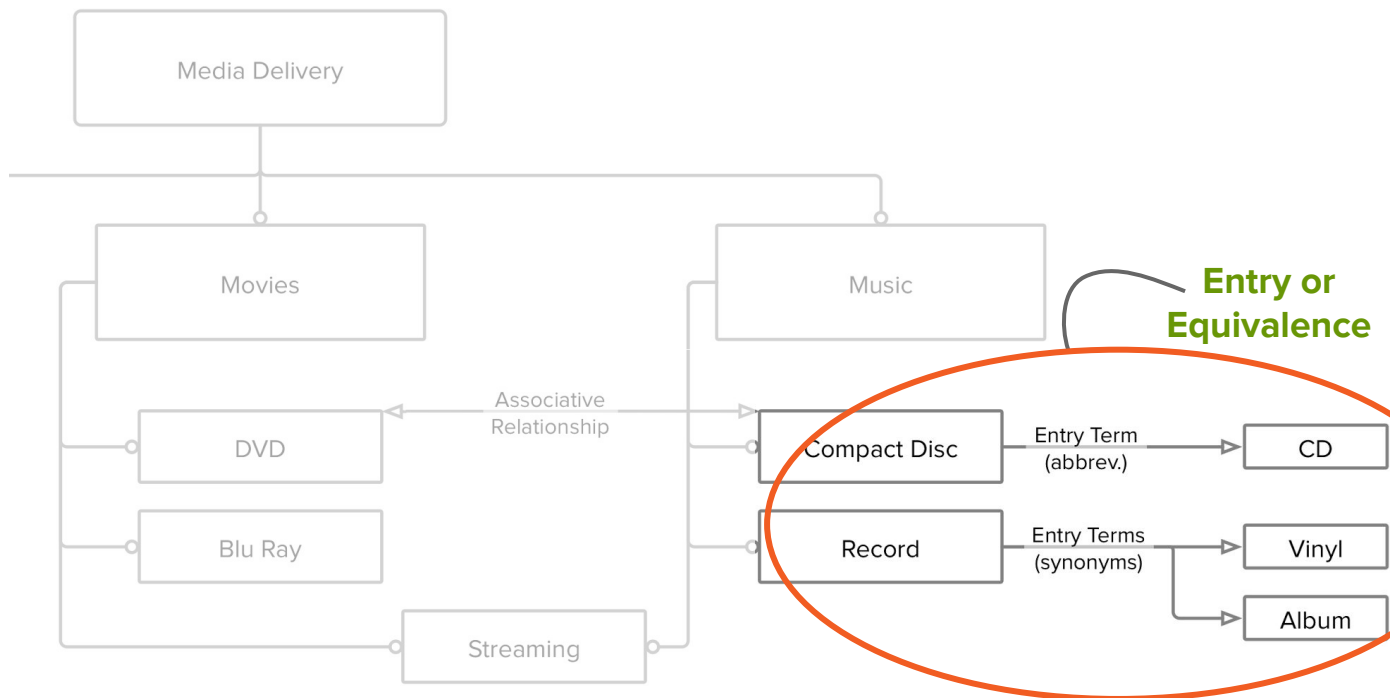
Relationships

Hierarchical



Relationships

Hierarchical

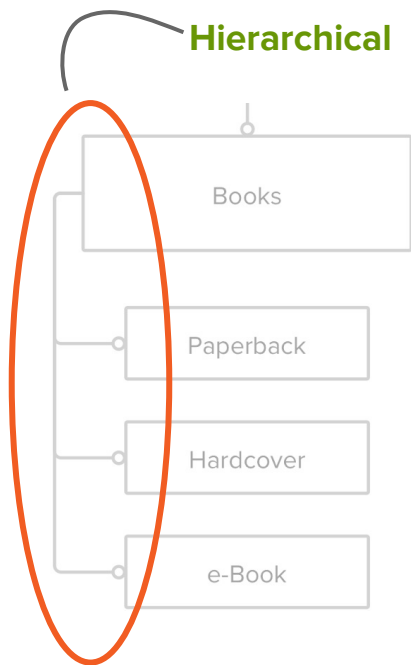


**Entry or
Equivalence**

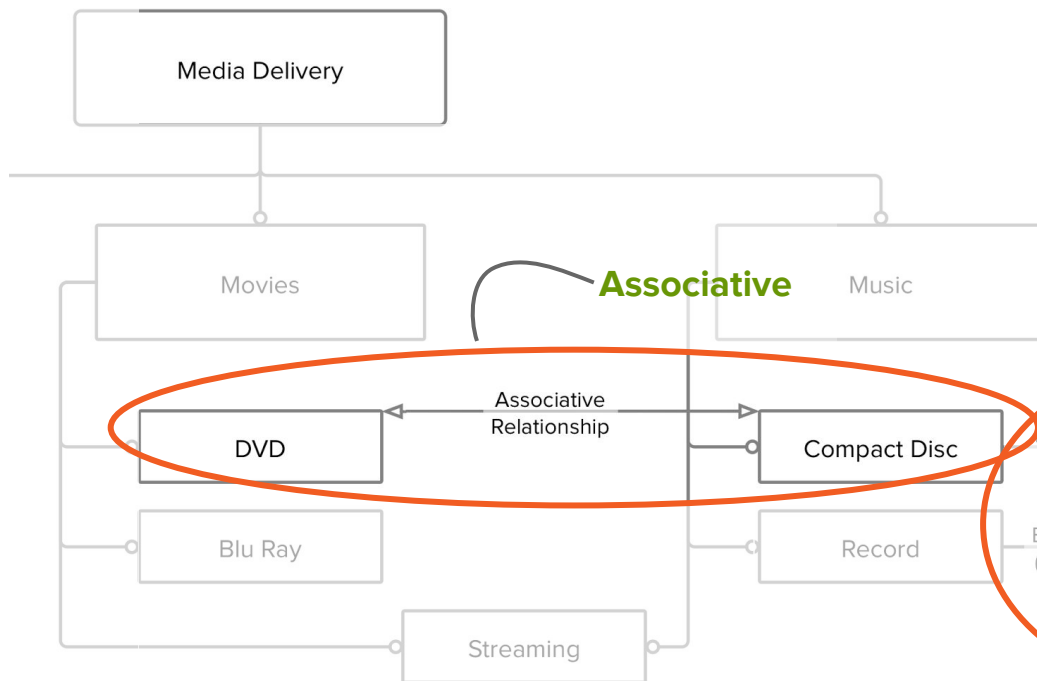
factor[™]

Relationships

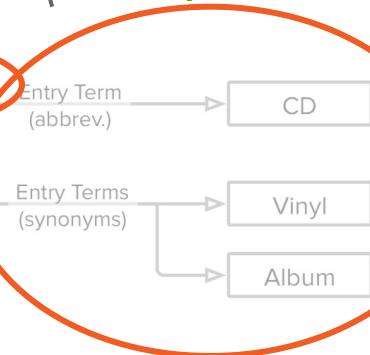
Hierarchical



Associative



**Entry or
Equivalence**



factor[™]

Relationships

Hierarchical

Books

Paperback

Hardcover

e-Book

Media Delivery

Movies

DVD

Blu Ray

Streaming

Associative

Associative
Relationship

Music

Compact Disc

Record

**Entry or
Equivalence**

Entry Term
(abbrev.)

CD

Entry Terms
(synonyms)

Vinyl

Album

Polyhierarchy

factor

More Sticky Notes!

Defining taxonomies

Describing the taxonomy itself so that it can be implemented properly and used by others.

This should provide the information needed by both the technical teams and the business teams to move forward.

Defining taxonomies

1. **Domain:** what the taxonomy contains & what it excludes.

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6. **Governance & maintenance needs:** process for maintenance?
7. **Frequency of update:** How often does this need to be updated?
8. **Roles:** Who is going to be interacting with this taxonomy?

Taxonomy Definition

Taxonomy Name	The label used to identify the taxonomy.
Domain	Describes what the taxonomy contains and what it excludes.
Usage Notes	Describes how the taxonomy is intended to be applied. Note: once developed, taxonomies may be used for multiple purposes. These notes reflect the primary usage.
Types of Terms	Describes the different classes of terms. This may include synonyms, preferred terms, leaf nodes, etc.
Types of Relationships	Describes the different ways that terms will be explicitly related and the business rules driving those rules.
Term Attributes Required	Metadata associated with each term. At a minimum each term requires a label, but there are generally scope notes, IDs, usage notes, and administrative metadata.
Governance & Maintenance Needs	High level description of the different processes, roles, and approvals required to make changes to the terms or the taxonomy structure.
Frequency of update	Related to Governance above, this describes how often the taxonomy will be modified.
Roles	Describes the different user profiles interacting with the taxonomy



Facets...let our taxonomical
powers combine!

Narrow Search By:

PRICE



TOP RATED



VARIETAL



WINE STYLE



REGION

view all

Spain

Rioja (191)

Ribera del Duero (60)

Priorat (36)

Navarra (15)

Rias Baixas (39)

Rueda (27)

Jumilla (12)

Other Spain (449)

FINE WINE



PUBLICATION



SPECIAL DESIGNATION



VINTAGE



Trending Now:

Clearance Sale (356)

New Arrivals This Week (371)

Fine Wine (1526)

Prestige Champagne (43)

Wine Spectator Top 100 (32)

Charitable Wines (56)

Premiere Napa Valley (8)

Recently Featured (10)

Best Value Bordeaux (152)

Spain



The third largest country in production, **Spain** ranks first in land under vine. Diversity and innovation are the key factors bringing Spain back into the world wine market. [learn more](#)

829 Results

Sort By: Most Popular



La Rioja Alta Vina Ardanza Reserva 2007

Tempranillo from Rioja, Spain



RP 94 V 92 WE 90

★★★★★ (13)



Palacios Remondo La Montesa

Other Red Blends from Rioja, Spain



WS 91

★★★★★ (7)



Bodegas Muga Gran Reserva Prado Enea 2009

Tempranillo from Rioja, Spain



1

Add to Cart

\$32.99

Ships tomorrow

Many small taxonomies
working together

\$69.99

Narrow Search By:

PRICE



TOP RATED



VARIETAL



WINE STYLE



REGION

view all

Spain

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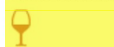
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Ships tomorrow



Palacios Remondo La Montesa

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★★★★★ (7)

Let our powers combine!



Bodegas Muga Gran Reserva Prado Enea 2009

Tempranillo from Rioja, Spain



\$69.99

1

Add to Cart

PRICE

\$20 and Below (534)

\$20 - \$40 (262)

\$40 - \$80 (80)

\$80 and Above (60)

TOP RATED

90+ Rated Under \$20 (114)

90+ Rated (375)

94+ Rated Under \$75 (38)

94+ Rated (77)

VARIETAL

Red Wine (531)

Cabernet Sauvignon (5)

Bordeaux Blends (2)

Other Red Blends (99)

Syrah/Shiraz (4)

Rhône Blends (5)

Grenache (58)

Mourvedre (17)

Other Red Wine (58)

Tempranillo (283)

White Wine (180)

Chardonnay (9)

Sauvignon Blanc (1)

Albarino (45)

Muscat (2)

Other White Blends (44)

Other White Wine (79)

Champagne & Sparkling (83)

Rosé Wine (35)

Dessert, Sherry & Port (106)

REGION

California (6064)

Washington (534)

Oregon (490)

Other US (41)

Australia (526)

New Zealand (319)

France - Bordeaux (846)

France - Rhône (490)

France - Other regions (1941)

Italy (2050)

Spain (936)

Portugal (302)

Israel (19)

Germany (113)

Greece (70)

Other European (80)

South America (797)

South Africa (206)

Japan (20)

Mexico (1)

Canada (6)

WINE STYLE

Red - Light & Fruity (8)

Red - Smooth & Supple (207)

Red - Earthy & Spicy (60)

Red - Big & Bold (114)

White - Light & Crisp (89)

White - Fruity & Smooth (59)

White - Rich & Creamy (2)

Sweet (1)

PUBLICATION

Wine Spectator (2622)

The Wine Advocate (3365)

James Halliday (188)

Connoisseurs' Guide (112)

International Wine Cellar (181)

Wilfred Wong of Wine.com (851)

Wine & Spirits (544)

Burghound.com (130)

Decanter (336)

James Suckling (1695)

PinotReport (19)

Tasting Panel (222)

Vinous / Antonio Galloni (3043)

Wine Enthusiast (2042)

Style = 'Red - Earthy & Spicy'

Varietal = 'Tempranillo'

Region = 'Spain'

Price = '\$20 - \$40'

Publication = 'Wine Enthusiast'

Top Rated = '90+ Rated'



The power of facets combined

Facet / Metadata	Number of terms
Wine Style	8
Region	21
Varietal	20
Price	4
Rating	4
Publication	14

The power of facets combined

Facet / Metadata	Number of terms
Wine Style	8
Region	21
Varietal	20
Price	4
Rating	4
Publication	14

Total terms: 71

Total combinations:
143,218,999

king [Save Search](#)

[Regular keyword search for "king" →](#)






Filter Results by...

Available now...

- ☐ At any location (10017)
- ☐ Capitol Hill Branch (2452)
- ☐ Fremont Branch (2297)
- ☐ Wallingford Branch (2164)

[More locations... >](#)

Format

-  Books
-  Audiobooks
-  Movies & TV
-  Music & Sound
-  Games & Software

Sort By: Relevance



1 - 25 of 11215 items



King
A Comic Book Biography
By Anderson, Ho Che



Book - 2005

B K585A 2005

All copies in use [Availability details](#)

 For Later

Place a Hold

While You Wait



King
By T. I., 1980-



Music CD - 2006

CD 782.421649 T1K

Available [at one of my preferred locations](#)

 For Later

Place a Hold

king [Save Search](#)

Regular keyword search for "king" →

Filter Results




Facets:

- Location of availability
- Format
- Date of acquisition
- Borrowing permissions
- Content (fiction/non-fiction)
- Audience
- Genre
- Topic
- Region
- Author
- Language
- Published Date
- Rating
- Tags
- Reading Level

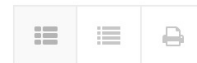
Available now...

- ☐ At any location
- ☐ Capitol Hill Branch
- ☐ Fremont Branch
- ☐ Wallingford Branch

Format

-  Books
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 Music & Sound



1 - 25 of 11215 items



 For Later



All copies in use [Availability details](#)

Place a Hold

 For Later



 Music CD - 2006

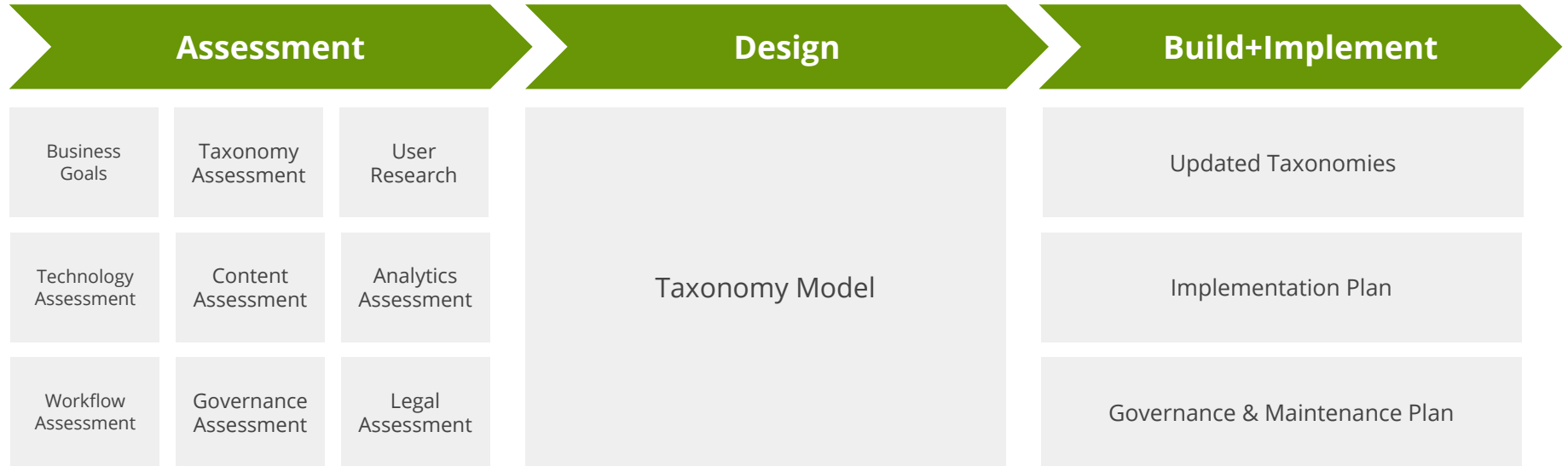
CD 782.421649 T1K

Available [at one of my preferred locations](#)

Place a Hold

Assessing Taxonomies

A Typical Taxonomy Project



Day 1

Many days/months later...

factor[™]

Business Goals

What it is

Document the business drivers that are behind this taxonomy work. What are the business 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

Show consumers that we provide high quality, lifetime kitchen products.

Support our new Chef's Star packages of product bundles.

Deliver consistent information across all our touchpoints.

Discussion: Business Goals

Current Taxonomy Assessment

What it is

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.

How it helps

Helps frame the scope of work going forward and often provides a tactical list of quick wins.

Sample findings

Taxonomy has many duplicate or similar terms.

Taxonomy does not reflect current marketing effort to sell sets of products.

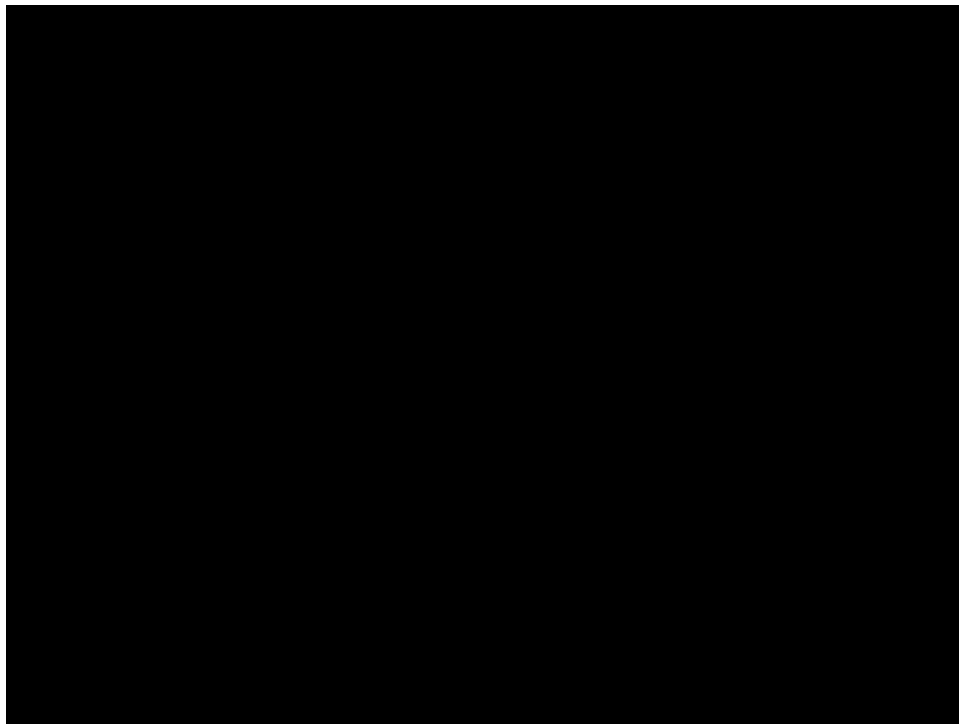
Taxonomy domain is poorly defined: many concepts that are not related

**Activity: Assess the
taxonomy!**

Taxonomy Definition

Taxonomy Name	The label used to identify the taxonomy.
Domain	Describes what the taxonomy contains and what it excludes.
Usage Notes	Describes how the taxonomy is intended to be applied. Note: once developed, taxonomies may be used for multiple purposes. These notes reflect the primary usage.
Types of Terms	Describes the different classes of terms. This may include synonyms, preferred terms, leaf nodes, etc.
Types of Relationships	Describes the different ways that terms will be explicitly related and the business rules driving those rules.
Term Attributes Required	Metadata associated with each term. At a minimum each term requires a label, but there are generally scope notes, IDs, usage notes, and administrative metadata.
Governance & Maintenance Needs	High level description of the different processes, roles, and approvals required to make changes to the terms or the taxonomy structure.
Frequency of update	Related to Governance above, this describes how often the taxonomy will be modified.
Roles	Describes the different user profiles interacting with the taxonomy


What Happened?



“All That We Share” - TV2 (Denmark), 2017



Taxonomies in business activities



This is the internet's
vision of "business
activities"

Taxonomies in business activities

Taxonomies in business activities

Search

Preferred Terms
Synonyms
Hierarchy

**Content
Management
Systems**

Preferred Terms

**Navigation
Structures**

Preferred Terms
Synonyms
Associations

**Publishing &
Personalization**

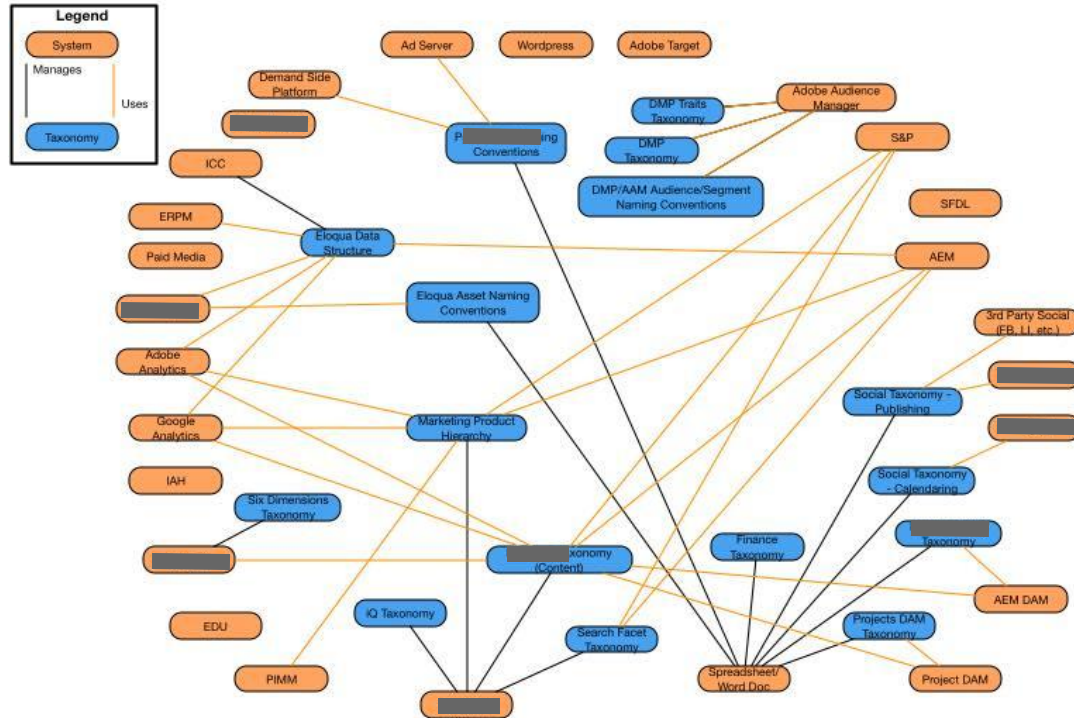
Preferred Terms
Translations

Reporting

Preferred Terms

Case Study: Enterprise Analytics

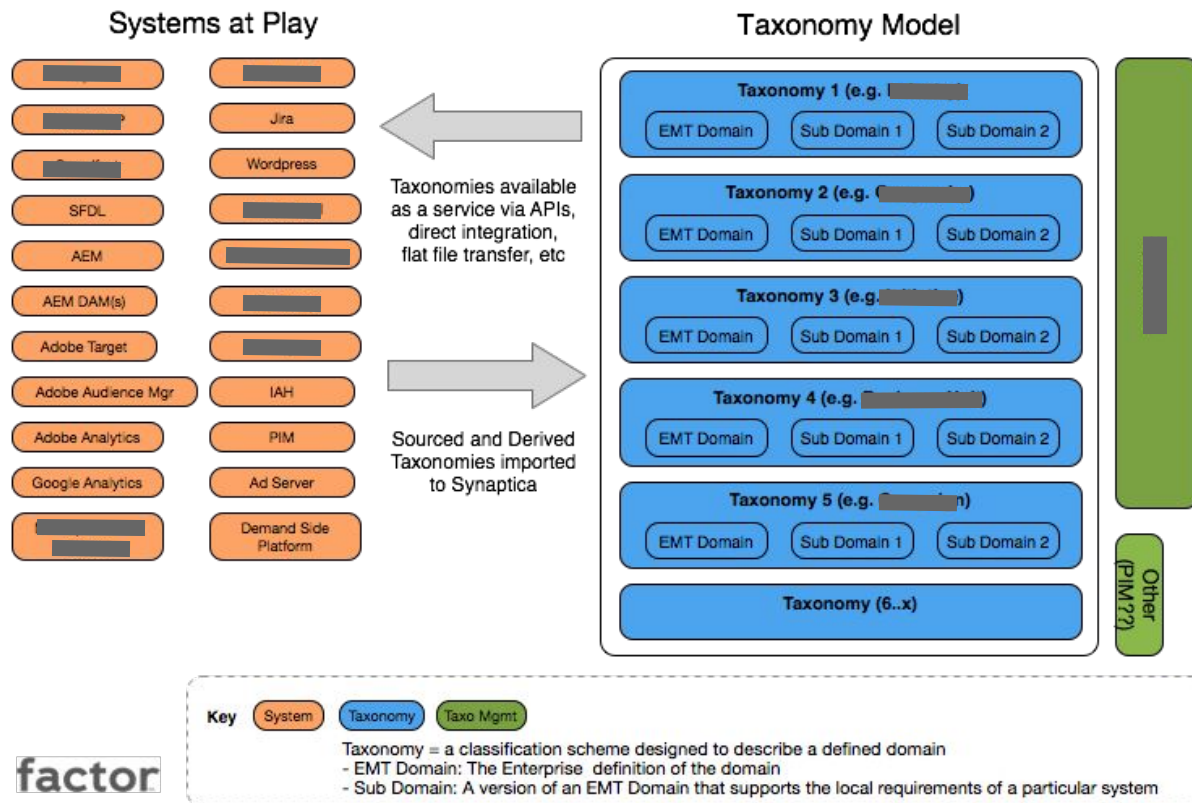
Taxonomy Landscape





factor[™]

Goal





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Enterprise Marketing Taxonomy - Step 1

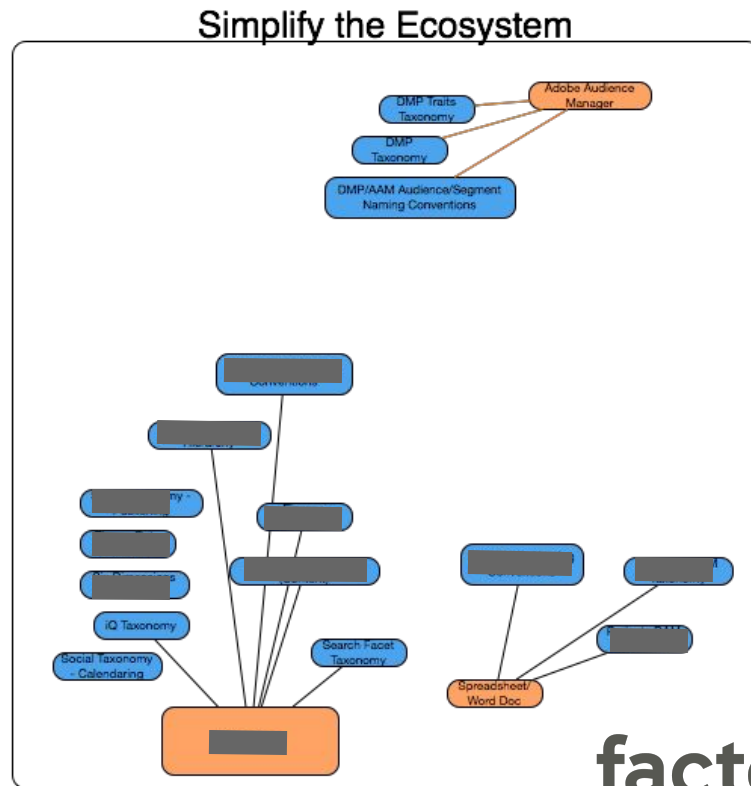
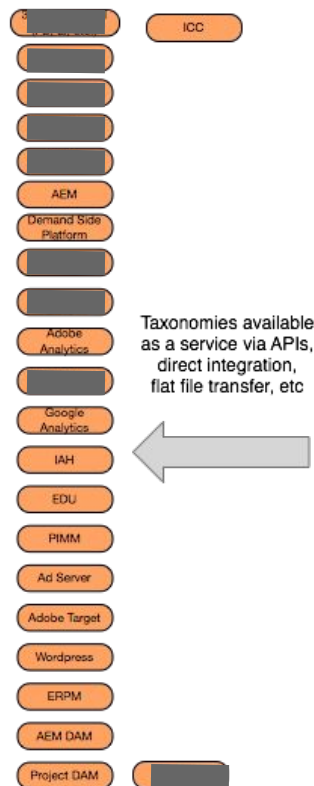
Taxonomies are well defined and made available programmatically.

Many have been moved into Synaptica.

Fewer systems managing the taxonomies. Some merging of taxonomies.

Framework in place to offer taxonomies as a service.

Note this is an example, the actual set of steps and roadmap will be determined in this project.



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Enterprise Marketing Taxonomy - Future

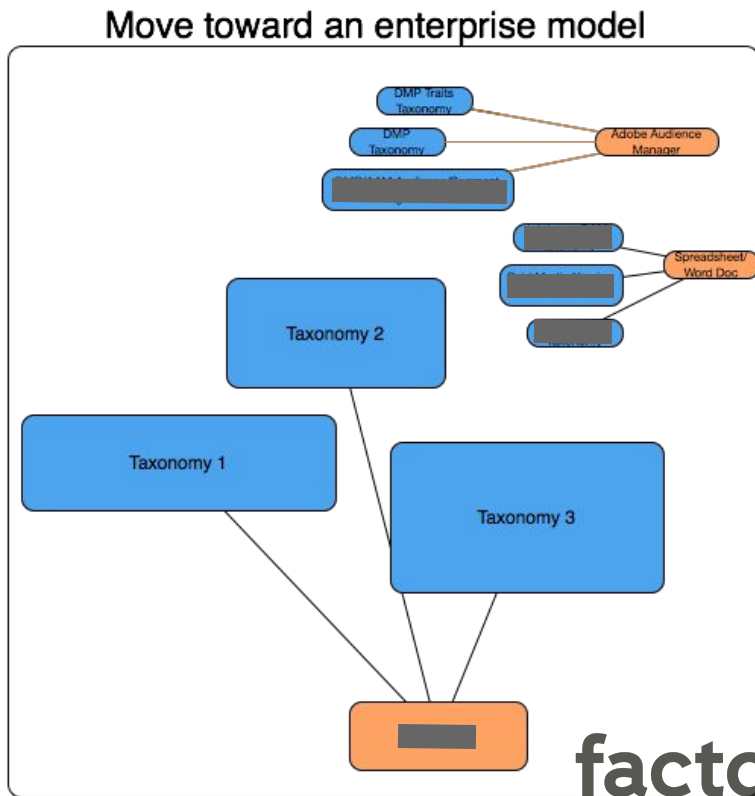
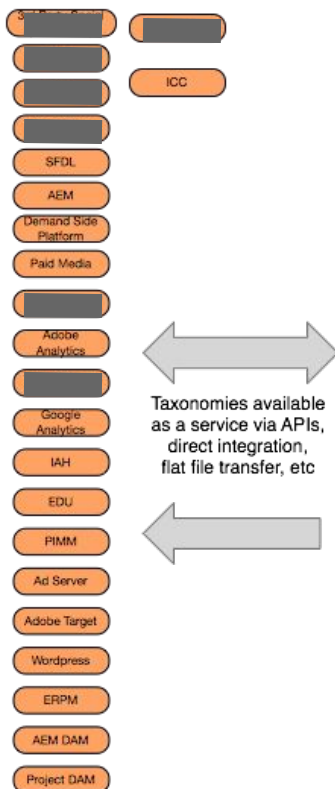
Taxonomies are rationalized, greatly reducing the total number of individual taxonomies.

A consistent enterprise semantic model is available.

Bi-directional integrations are available.

Governance and Maintenance processes are well defined.

Framework in place to offer taxonomies as a service.



Content Assessment

What it is

Documents the types of information being used and the different ways the information is bundled, distributed, and categorized

How it helps

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

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.*

SHIPPING TO
🇺🇸 [UNITED STATES](#)

MR PORTER

[WHAT'S NEW](#)[DESIGNERS](#)[CLOTHING](#)[SHOES](#)[ACCESSORIES](#)[WATCHES](#)[SPORT](#)[GROOMING](#)[EDITORIAL](#)

THE MEN'S STYLE DESTINATION



TIME TO WIND FORWARD:
FINE WATCHES



CRAFT AND STYLE:
JAPANESE BRANDS

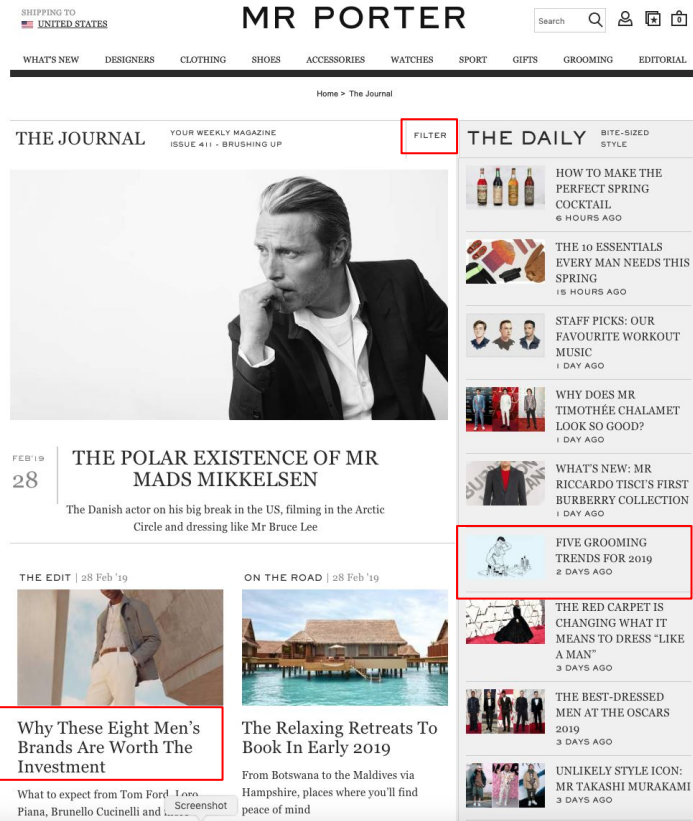


THE DAILY:
MONK-STRAP SHOES



ctor™

Content and Taxonomies

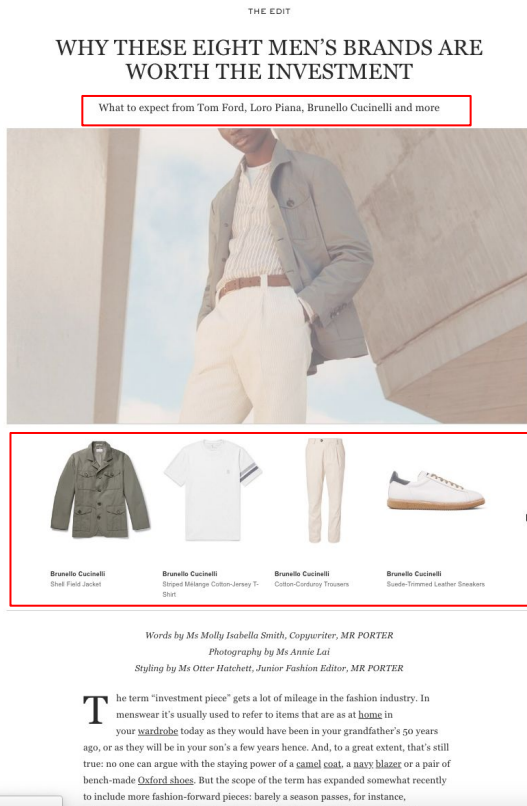


- “Editorial” or non-product content
- Product content
- Micro-content

Editorial / Marketing
mrporter.com

factor™

Content and Taxonomies



- Taxonomies support product content on non-product pages
- Taxonomies support content strategy

Editorial / Marketing
mrporter.com

factor™

allrecipes

BROWSE ▾

noodles

Ingredient Search



Create a profile

340 recipe results for "noodles" including "cream" but not "peppers" [Edit search](#)

Popular Category

Noodles

752 recipes, 56 videos

Looking for noodle recipes? Allrecipes has more than 750 trusted noodle recipes complete with ratings, reviews and cooking tips.



Bacon Ranch Chicken Skewers



These bacon ranch chicken skewers were intended to star at your next tailgate cookout.

[MEAL](#)[RECIPE](#)[SHOPPING LIST](#)

Dress Up Your Meal with Ranch
Hidden Valley® Original Ranch®

[See Store for Price](#)

Pick a Side Vegetable
Green Beans

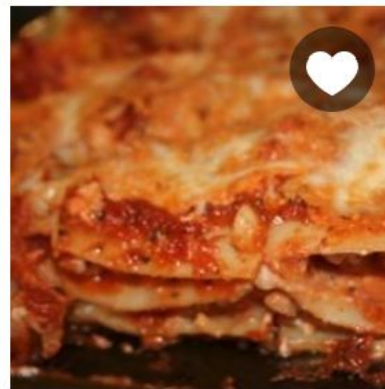
[See Store for Price](#)

Pick a Side Beverage
Canada Dry Ginger Ale

[See Store for Price](#)

fresh

AmazonFresh
Groceries delivered
to your door

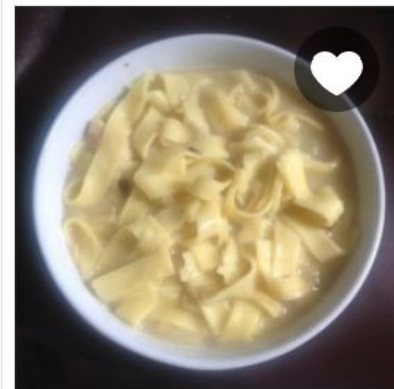
[Buy Meal Now](#)

Creamy Chick



Poached chick
mozzarella ma
for this rich las
mozzarella are

Recipe by Caroli



Search
allrecipes.com



5



621



20



Living Room



Bedroom



Bathroom



Dining Room



Entry & Mudroom



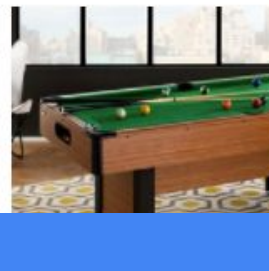
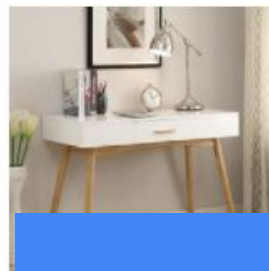
Kitchen



Patio



Nursery & Kids Bedroom



Navigation:
'Room' taxonomy *Wayfair.com*

Furniture / Kitchen & Dining Furniture / Kitchen & Dining Tables

Round Kitchen & Dining Tables

1,528 results

Shape: Round X

[clear all](#)

Sort:

Recommended



Get It Fast



Express Shipping

Zip Code: 98122 [change](#)

Shape



Rectangular



Round



Square



Oval



Free Form



Octagon

Top Material



Solid wood (691)

Manufactured Wood
(277)

Glass (391)



Metal (54)



Marble (38)

[More Options: Finish »](#)Gloucester Extendable Dining
Table

by Charlton Home®

\$164.99

FREE Shipping

★★★★★ (273)

[More Options: Finish »](#)Bonenfant Dining
Table by Darby Home Co.**\$192.99**

FREE Shipping

★★★★★ (96)



Search term level of specificity
impacts result page
Wayfair.com

Cardsort

Open:

<https://iac2019.optimalworkshop.com/optimalsort/open>

Closed:

<https://iac2019.optimalworkshop.com/optimalsort/closed>

Gathering Evidence for Design Decisions

User Research

What it is

Qualitative research of your users' behaviors and information needs. Can take many forms - generative or evaluative.

How it helps

Gives you directional information about how people structure your catalog in their heads (relationships between concepts).

Provides direction on language and term labels.

Sample findings

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

Card Sort Results

Review: Taxonomies in business activities

Search

Preferred Terms
Synonyms
Hierarchy

**Content
Management
Systems**

Preferred Terms

**Navigation
Structures**

Preferred Terms
Synonyms
Associations

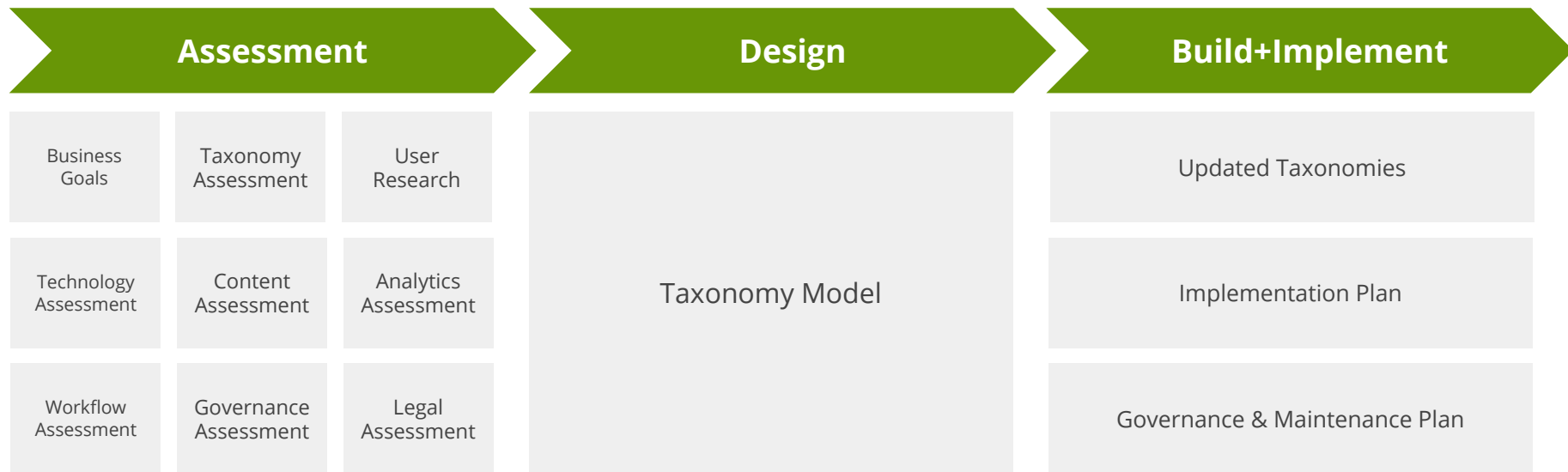
**Publishing &
Personalization**

Preferred Terms
Translations

Reporting

Preferred Terms

A typical taxonomy project

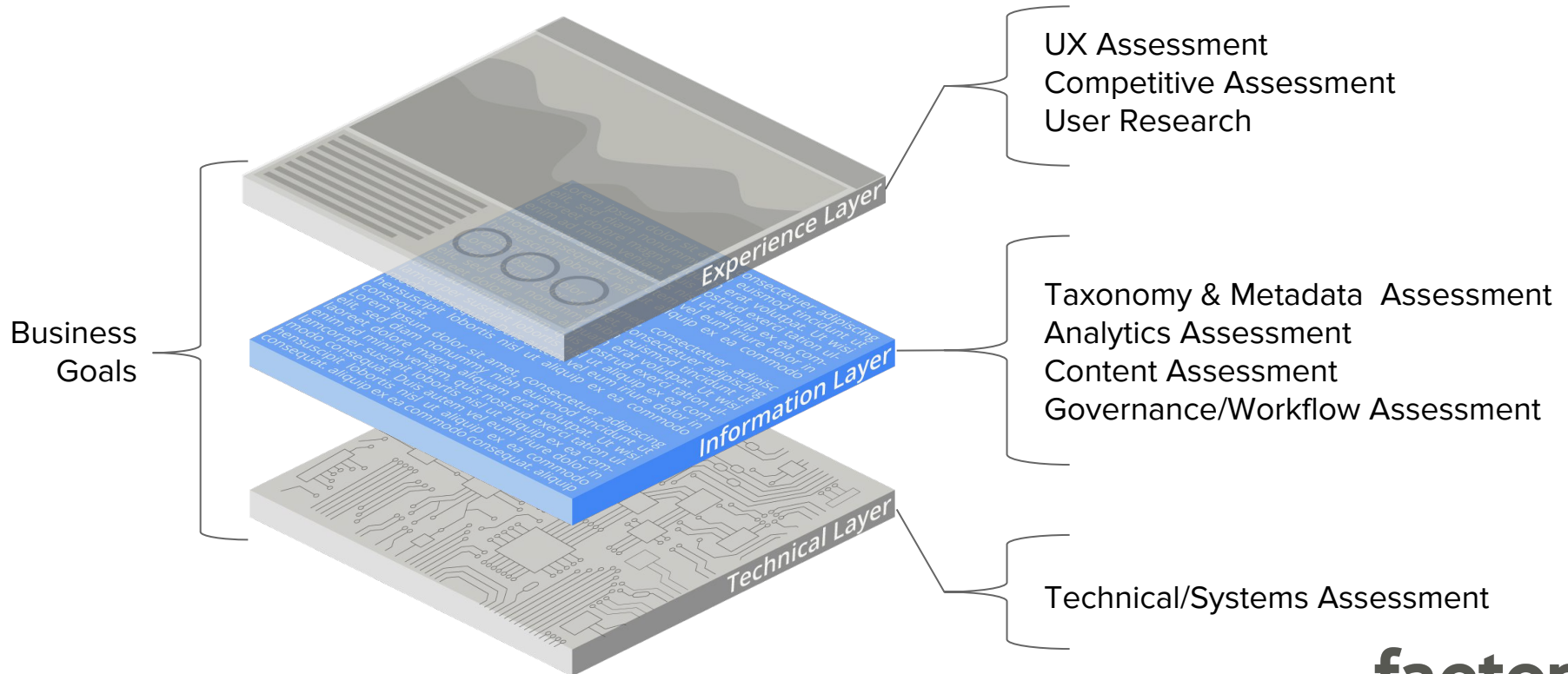


Day 1

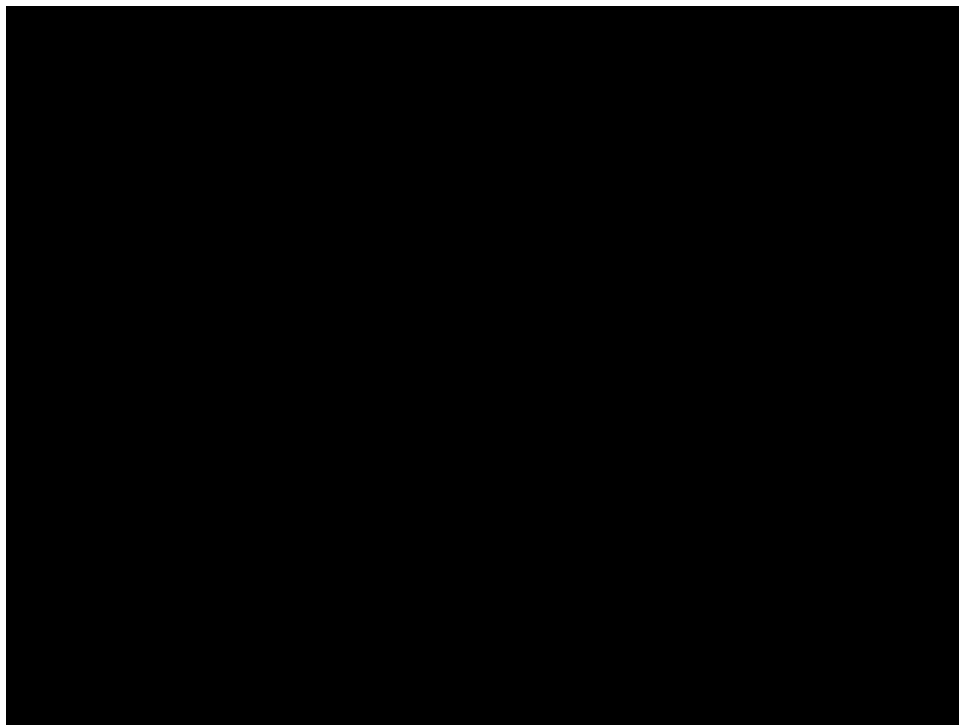
Many days later...

factor[™]

Assessments in Context



Why so many inputs?



High Fidelity (2000)

Technology Assessment

What it is

Documents the the technical capabilities of the organization with respect to taxonomy modeling, management, and integration

How it helps

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

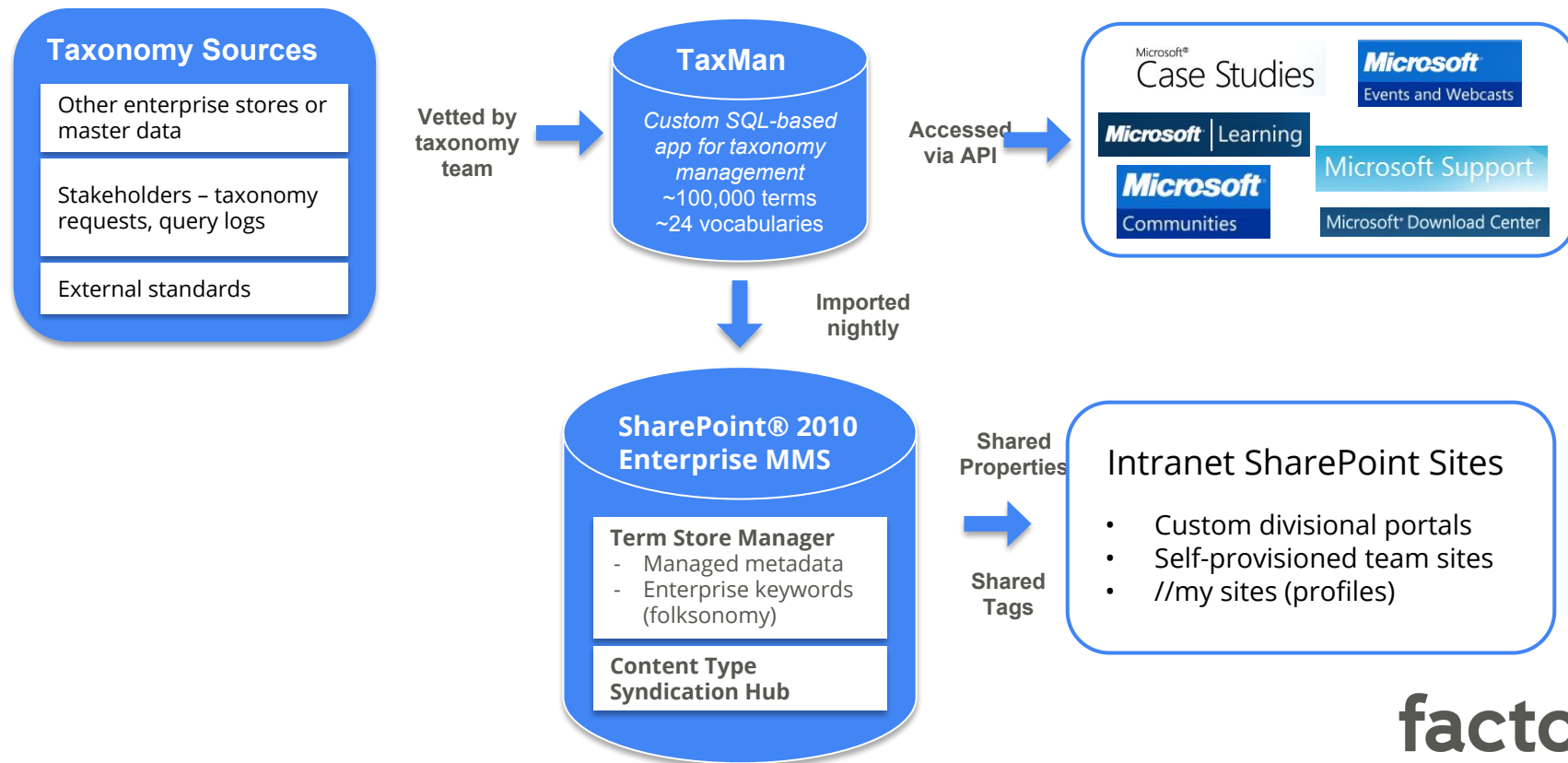
The CMS can only support 3 levels of hierarchy in the navigation.

The CMS cannot export the hierarchy.

Search tool supports synonyms and associated terms.

Case Study: Microsoft

Taxonomy Landscape



Project Goals

- Reduce confusion, increase confidence and use of term store taxonomy stakeholders
- Lay the foundation for effective stakeholder onboarding
- Ensure the taxonomy in the term store supports optimum information discovery on the intranet

Governance Goals & Strategy

Enterprise Domain Taxonomy (EDT):

Contains all managed terms for the MMS. May be one or more term sets.



Enterprise
Domain
Taxonomy
(EDT)



Subject Domain Taxonomies (SDT):

Subsets of the EDT. While all the terms will come from the EDT, each SDT can have its own structure.

Taxonomists manage all the terms in the EDT and any structure that is deemed necessary.

Taxonomist structures the taxonomy and guides the creation of governance and maintenance plan. May also manage the taxonomy.

Technology needs to be built to either enforce the subset rule or to report SDTs that are out of compliance.

Governance needs to describe the process for adding new terms.

Project Outcomes

Functionality supported

1. Business owner ability manage their own domain area.
2. Use of Enterprise Domain (Taxman) taxonomy import maintained.
3. Leveraging the “open” term set to allow end user tags to be easily added.

Governance changes

4. Sales, Marketing and Services team is a strong partner in leveraging the corporate taxonomy.
More stakeholders on-boarding.
5. Clear value of taxonomist vetting terms via the process.
6. More flexible on terms added to the corporate taxonomy.

Term Set changes/improvements

7. Needed to reconcile subject domain terms to be included in the enterprise domain.

Governance Assessment

What it is

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

How it helps

An understanding of the types of changes that will need to be supported and the approval processes. These can have large impacts on the taxonomy design and are essential for designing of the governance processes.

Sample findings

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

Analytics Assessment

What it is

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

How it helps

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

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

**Discuss: Governance, Analytics,
and Technical Needs**

What has dependencies on a taxonomy?

What does the taxonomy have dependencies on?

Workflow Assessment

What it is

Often closely tied to the governance assessment, this documents the processes necessary to create, maintain, and use the taxonomy internally.

How it helps

Identifies the requirements of internal users of the taxonomy. Also documents the level of effort required to use the taxonomy. Each of these can impact the scope, design, and resourcing for the taxonomy.

Sample findings

There is no systematic way to assign colors consistently to products and content editors must enter product colors by hand.

Knives need to undergo legal review.

Legal Assessment

What it is

Checking with the legal team (if there is one) about compliance regulations and other red tape that may impact your decisions.

How it helps

Makes you aware of your legal constraints - compliance regulations, trademark or copyright issues for term names, contractual issues to be addressed, etc.

Sample findings

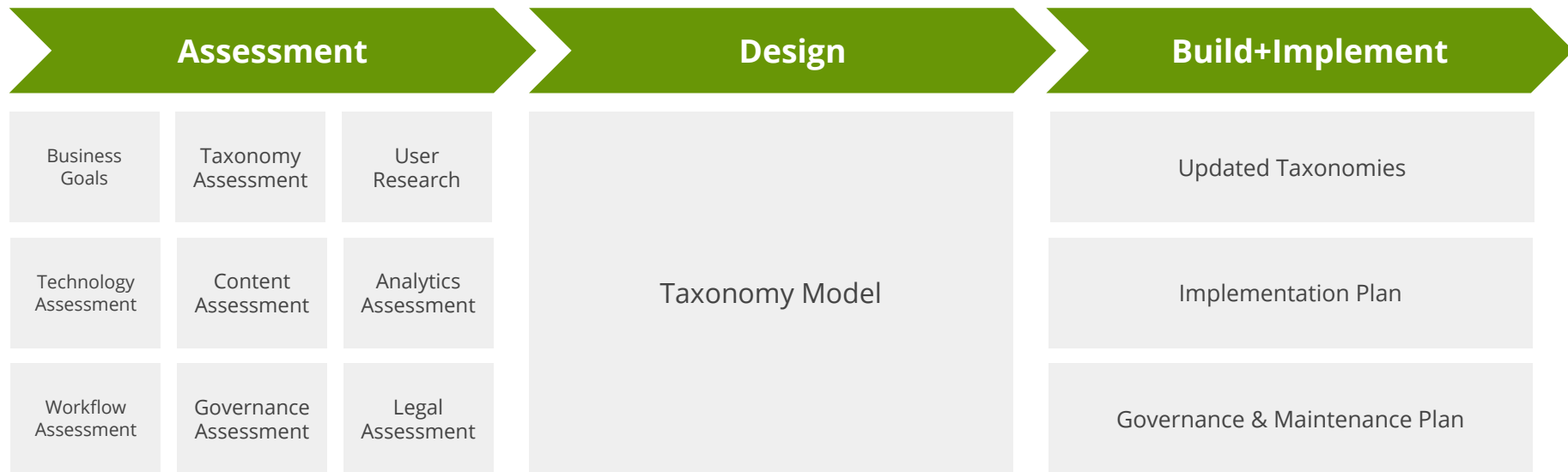
When you get to talking about governance, you need to give the legal team an advisory role when terms are being changed.

Taxonomy Definition

Taxonomy Name	The label used to identify the taxonomy.
Domain	Describes what the taxonomy contains and what it excludes.
Usage Notes	Describes how the taxonomy is intended to be applied. Note: once developed, taxonomies may be used for multiple purposes. These notes reflect the primary usage.
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Roles	Describes the different user profiles interacting with the taxonomy

Synthesize

A Typical Taxonomy Project



Day 1

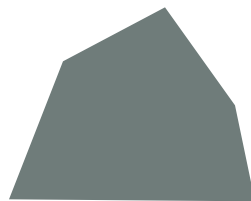
Many days/months later...

factor[™]

When does a molehill become a mountain?

When does a molehill become a mountain?

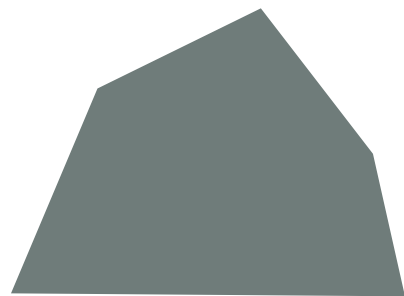
1. **Number of systems**



factorTM

When does a molehill become a mountain?

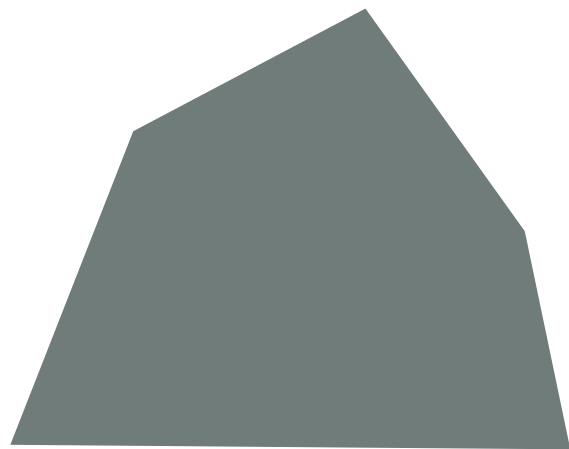
1. Number of systems
2. **Number of workflows**



factor[™]

When does a molehill become a mountain?

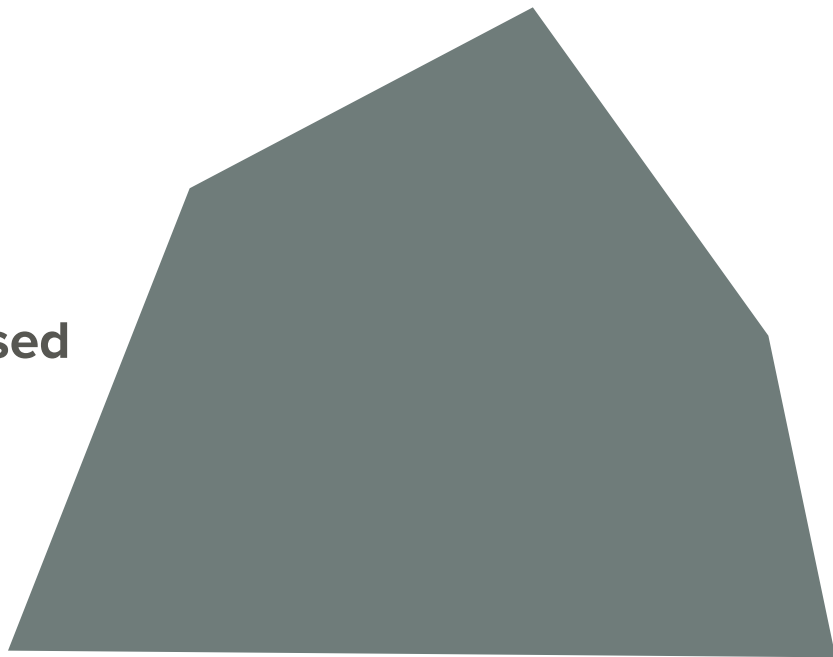
1. Number of systems
2. Number of workflows
3. **Number of user profiles**



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When does a molehill become a mountain?

1. Number of systems
2. Number of workflows
3. Number of user profiles
4. **Number of places it will be used**



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When does a molehill become a mountain?

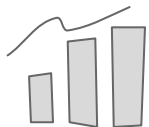
1. Number of systems
2. Number of workflows
3. Number of user profiles
4. Number of places it will be used
5. **Number of business units**

To Conclude...

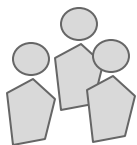
How to win taxonomy friends & influence structures



Define the business value, meet cost criteria



Include metrics to prove success



Take user behavior seriously



Manage expectations all around & collaborate

Gary Carlson

gary@factorfirm.com

Dana Bublitz

dana.bublitz@factorfirm.com

factorTM