

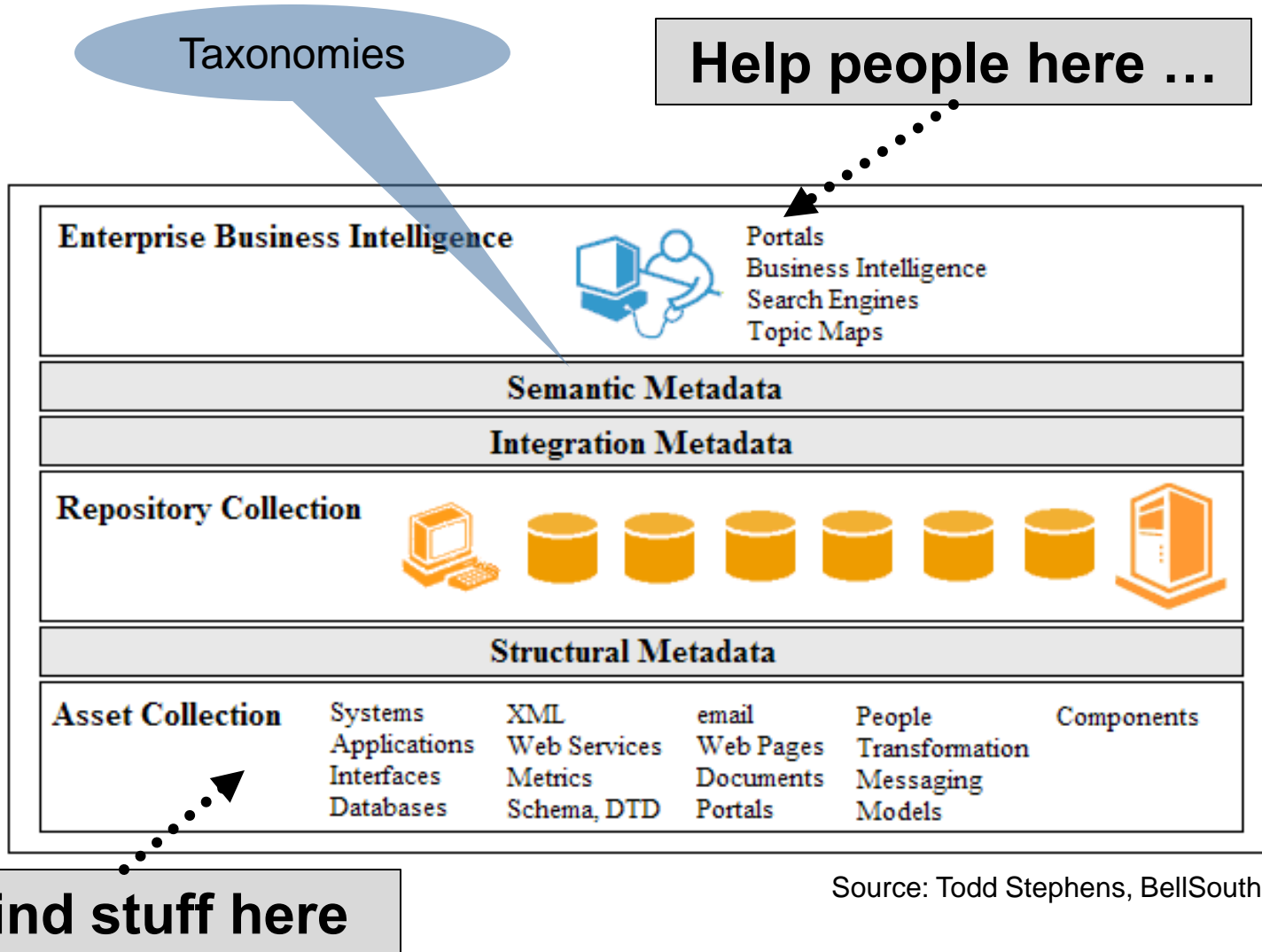
# **The Value of Taxonomy Management—Research Results**

Joseph A Busch, Principal

# What does taxonomy do for search?

<b>Function</b>	<b>Description</b>
<b>Related search</b>	Query corrections ... did you mean?
<b>Concept search</b>	Query expansion with synonyms, abbreviations, acronyms, etc. ... do you also want?
<b>Ontology-based search</b>	Query expansion with narrower or broader terms; scoping exhaustive search results
<b>Faceted search</b>	Dynamic filtering of search results; online shopping
<b>Clustering</b>	Dynamically bucketing search results into pre-defined categories
<b>Subscriptions</b>	RSS feeds, alerts, SDI (selective dissemination of information), etc.
<b>Personalization</b>	Weighting search results based on explicit profiles and implicit data (where you've been and what you've done)

# Integrating taxonomy in the enterprise stack



Source: Todd Stephens, BellSouth

# Taxonomy management is ...

- ❖ *“... an application on a computer or server to manage sets of terms and perhaps their attributes.”*
- ❖ *“... related to metadata, taxonomy and ontology management.”*
- ❖ *“... both traditional taxonomy editing, as well as knowledge representation—indexing and ontology building.”*
- ❖ *“... an essential building block for our current marketing goals.”*
- ❖ *“... many cool things that can be done with a managed list.”*
- ❖ *“... site structure, controlled vocabulary, relationships between those terms.”*
- ❖ *“... a platform solution.”*
- ❖ *“... a different way of managing content for our site.”*
- ❖ *“... not just product information.”*
- ❖ *“... beyond just trading spreadsheets.”*
- ❖ *“... an enterprise- or department-wide capability to define business terms and business rules.”*
- ❖ *“... data stores and a user interface to enter vocabulary content.”*

Taxonomy Management Interviews

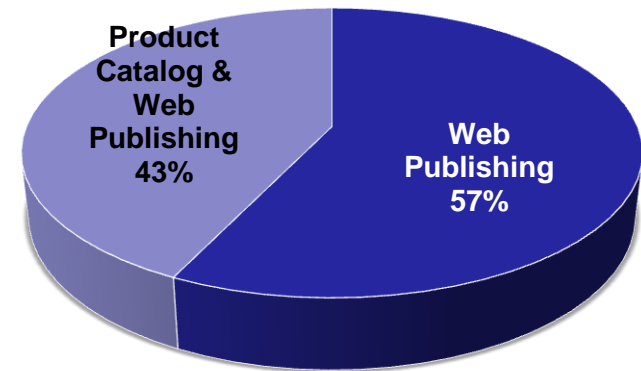
# WHO WE TALKED TO

# Roles

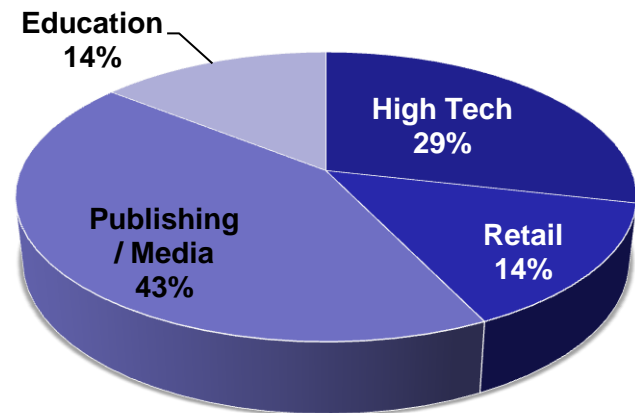
- ❖ Metadata manager
- ❖ User experience manager (marketing)
- ❖ Marketing technical manager
- ❖ Internet customer experience manager (technical)
- ❖ Taxonomy team manager
- ❖ Content development manager
- ❖ Data architect
- ❖ Standards lead
- ❖ Director of digital content

# Business categories

- ❖ All interviewees identified as web publishers, even those with B2C catalog websites.



By Type



By Industry

Taxonomy Management Interviews

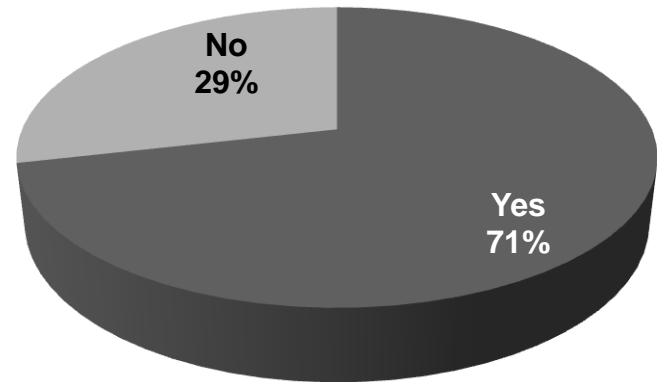
# WHAT ARE THE PROBLEMS



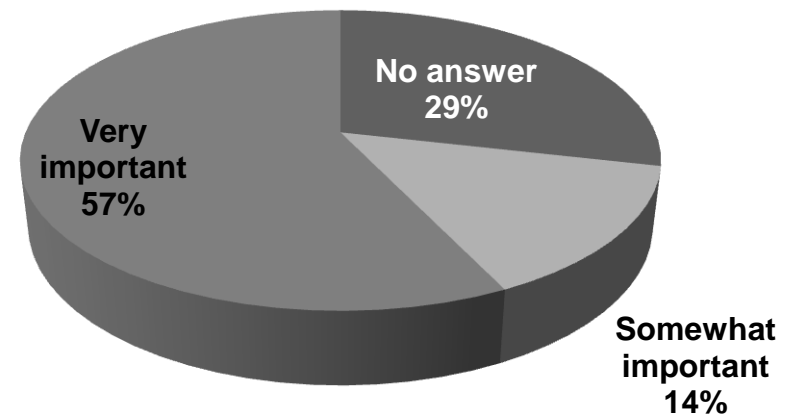
# Taxonomy management

- ❖ *“Because of the dramatic changes in the way that content is produced and distributed ... companies need to adopt new business and technology models to survive.”*

Is taxonomy management a problem?



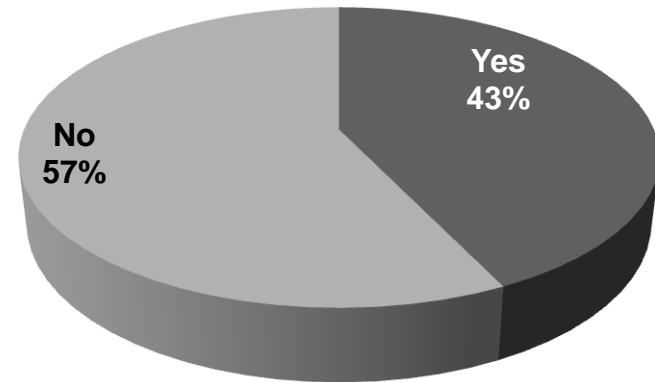
How important is taxonomy management?



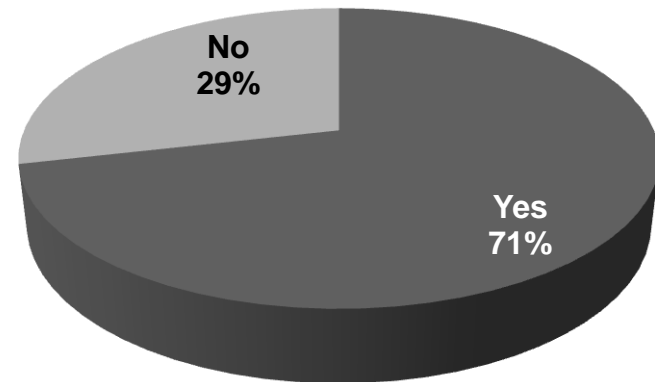
# Taxonomy management application

- ❖ Only 43% have a taxonomy management application, but 71% are considering buying one.

Do you have a taxonomy management application?



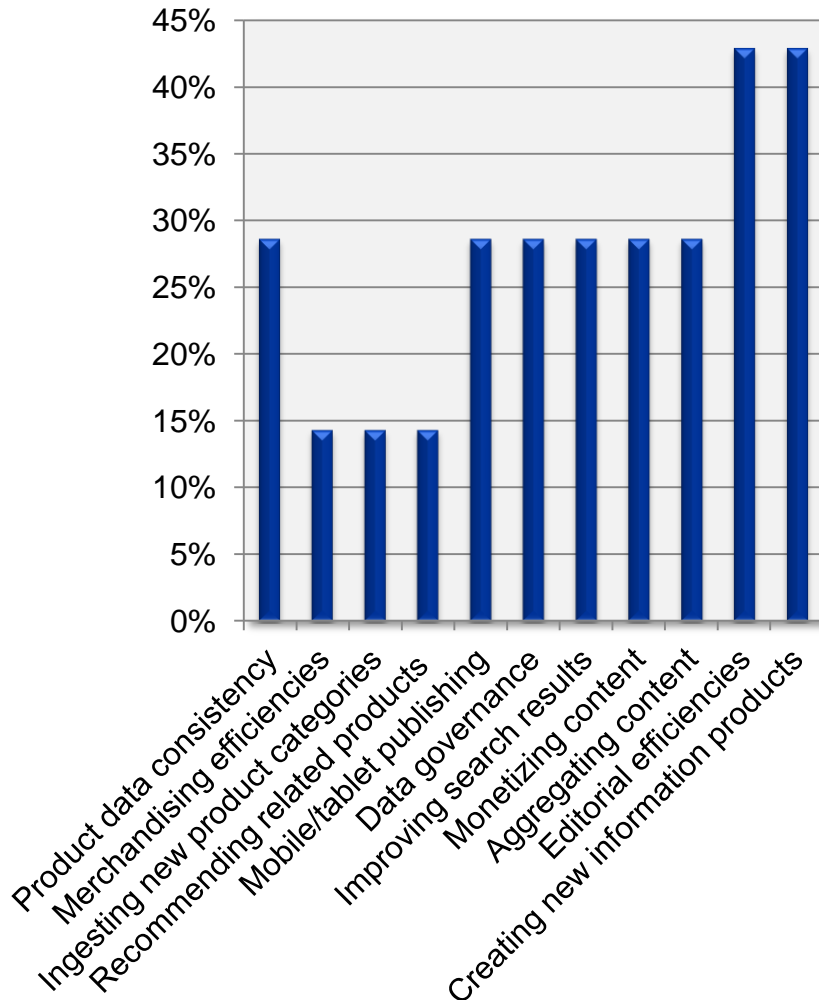
Are you considering buying an application?



Taxonomy Management Interviews

# VALUE PROPOSITIONS

# What are important taxonomy management value propositions?



- ❖ Main value propositions are around efficiencies, not revenue.
  - **ACCURACY.**
  - Single source for all platforms.
  - Reuse of content objects and assets
  - Creation of new kinds of products, new forms of product delivery, and new kinds of services.
  - “We are trying to do everything we can to fix the customer experience.”
  - “It’s hard to separate taxonomy from the rest of the customer experience activity.”

# Findability value propositions

- ❖ “Searchability is a key issue for our products. Precision and recall is very important. We need to ensure clients that they are finding all of the relevant content.”
- ❖ “Text mining depends on our taxonomy, how quickly we can deliver new versions and can amend and append our taxonomies.”
  - We were used to handling a small amount of stable taxonomies, mostly internal. Now we need to do crosswalks, we need to mesh various taxonomies together, and we need to merge particular branches. This is difficult and very time consuming.
- ❖ “One of the top problems is navigation, finding the right content. This will allow us to do things faster, and save money.”

# Marketing value propositions

- ❖ “... bringing the management of metadata [from IT] back within marketing. ... efficiency and pulling ownership upstream ... This is a huge risk point for marketing.”
- ❖ “Our content architecture does not have coherent marketing. We want to bring all types of content together using taxonomy. ... We see the taxonomy as what brings relationships between content, from the online and offline perspective, and provides the glue that holds the user experience together.”
- ❖ “1) Reuse of content objects and assets, and everything that goes with reuse, such as the need to locate content objects and assets so that they can be reused. The focus is on efficiency. 2) Creation of new kinds of products, new forms of product delivery, and new kinds of services many enabled by semantic technology.”

# Standardization value propositions

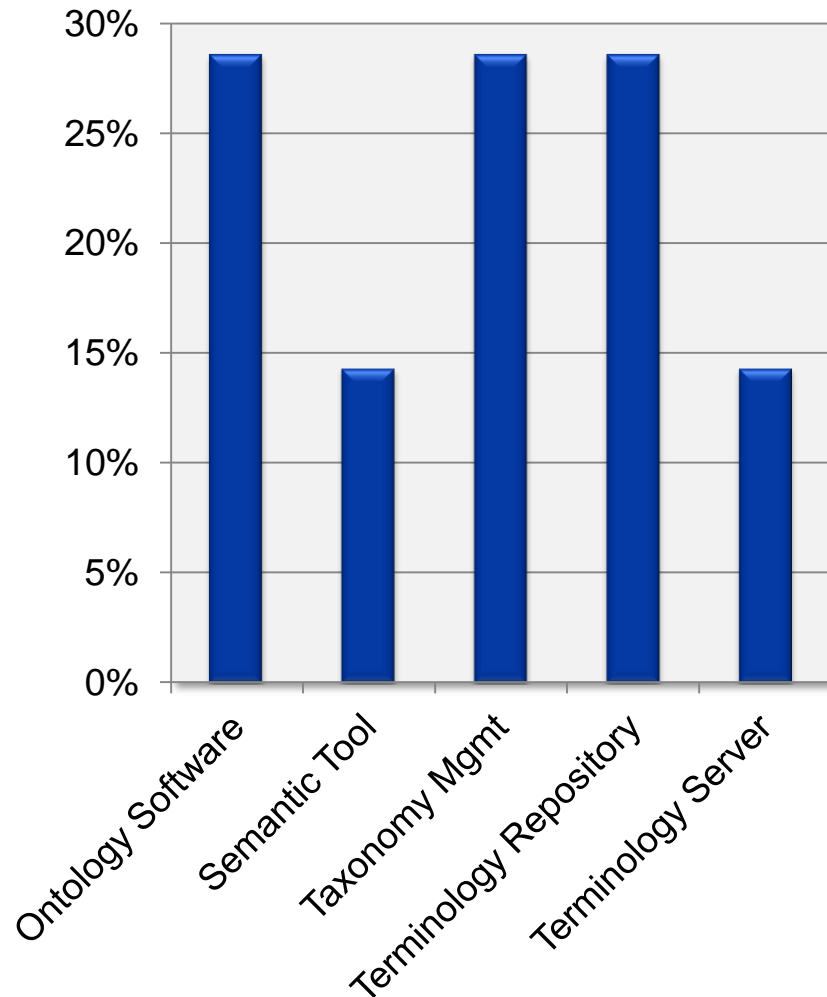
- ❖ “... better align with ‘standards’ because that is what our customers want... We are not so interested in saving time, but interested in keeping our customers happy.”
- ❖ “Centralized data governance so that there is an established ‘truth’ for what this vocabulary is supposed to be rather than having multiple vocabularies used in different parts of the organization.”

Taxonomy Management Interviews

# **INTEGRATION ISSUES**



# Whole taxonomy management product



- ❖ The perceived whole product does not necessarily include integration with search, categorization or content management.
- ❖ It is expected that integration will be required and that it will be a large additional cost that is a multiplier of the software license.

## Whole product is ...

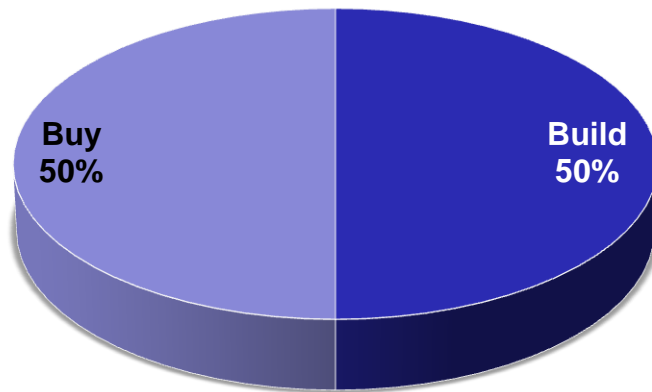
- ❖ *“A central repository for enterprise-wide vocabularies that establishes the governance and maintenance and feeds to the other systems where tagging takes place.”*
- ❖ *“... solely for maintaining, storing and working on our taxonomies. But I see taxonomy management as something more inclusive in the future.”*
- ❖ *“The repository that shows me all the things I’m sticking together... the information model.”*
- ❖ The major issue is the ease of integration with our own proprietary asset management system.

# Integration

- ❖ *“This will cost many more times the license fees.”*
- ❖ *“The technology is causing a business process change. We want to get to the point where we can aggregate content and focus on the cool and interesting projects.”*
- ❖ *“I’m not worried about implementation. The acquisition costs were relatively cheap compared to the cost to implement in systems.”*
- ❖ *“... we test implemented three systems. It wasn’t as easy as we had hoped.”*

# Build or buy decision

Is taxonomy management a build or buy decision?



- ❖ *“... you can’t buy much of an engineer for \$25K, and the waiting time for availability is 6 months.”*
- ❖ *“We need something that can be licensed and supported.”*
- ❖ *“It’s definitely a buy decision because we are going to have to do an enormous amount of work to build around it, doing integrations, etc.”*

# QUESTIONS

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# Abstract

- ❖ Bringing the management of metadata back from IT into the marketing department, centralizing governance so that there is an established “truth” for what data values are supposed to be, and searchability to ensure that customers are finding all the relevant content are some of the key value propositions driving current interest in semantic technologies for building and using enterprise taxonomies and taxonomy management tools. This presentation will discuss findings from discussions with content managers that are identifying the market drivers for taxonomy management and the key functions that need to be supported. This presentation will discuss answers to questions including:
  - What is taxonomy management, and how important is it?
  - What are the common business cases for taxonomy management, and how long does it take to realize the ROI?
  - Do organizations currently have taxonomy management tools, or are they planning to acquire them?
  - What is the most important functionality, and what is considered a “whole” product?
  - Who are taxonomy managers, and what do they do?
  - How many people in an organization use taxonomy management tools, and what do they do with them?