



## SchemaLogic Advisory Services:

# Enterprise Taxonomy Assessment

### Taxonomy Checkpoint #1:

#### Do you really need a taxonomy solution?

- **True or False:** Most of your employees are having trouble finding information, either through browsing sites or using search
- **True or False:** It's obvious that the same type of information is called one name in one group, and something completely different in another group
- **True or False:** Some employees complain that they're 'reinventing the wheel' for work they think has already been done by someone in another group
- **True or False:** Workers on project teams feel that important information is inaccessible to them because it's stored in another 'siloes' database
- **True or False:** Your company has more than one enterprise application—such as a document management system—that needs to 'tag' information as it's being created by employees
- **True or False:** No one is responsible for updating or maintaining a 'master list' of vocabulary terms used throughout the entire company.

*If you answered "True" to two or more of these checkpoints, contact SchemaLogic to find out how using taxonomies can benefit your company.*

*This data sheet provides useful information about how a site assessment and roadmap can have immediate benefits to a company looking for advice and assistance in designing taxonomies for information management projects.*

#### What are Advisory Services?

Many companies have been considering creating and using taxonomies to help organize an ever-increasing volume of information being created daily by employees.

*However, most companies do not know where to start, or even have a clear understanding of how taxonomies can be used to help improve search, increase content value or facilitate compliance.*

Being able to understand the scope of the issue and 'clear the air' about creating and using taxonomies is the first step for many companies in their effort to provide information workers with better ways to find and use information.

But simply including taxonomies as a line item in a project plan does not mean that they will benefit the company. In fact, without the correct planning and careful implementation of taxonomies within a company, the results could be even more chaotic and expensive than not using taxonomies at all.

Defining, developing and managing taxonomies and how they should be used within a company can be a long process, but there are ways to quickly discover how developing taxonomies can have an almost immediate impact on information discovery, findability and compliance within organizations of all sizes.

SchemaLogic's Industry Solutions team has led or participated in taxonomy projects and software implementations of all sizes and in many industries. The team brings a wealth of practical knowledge, specific technical expertise (search, content management, records and document management) and a proven methodology to every assessment.



**Taxonomy Checkpoint #2:****What kind of companies typically benefit from using taxonomies?**

- Companies that focus on delivering information to clients benefit greatly from being able to rapidly assemble content for different business channels using rich metadata
- If a company has information that comes from many different sources and goes through many iterations before it's complete—a pharmacological company, for example—can benefit from having their metadata managed throughout long information lifecycles
- Companies that manage information in a number of different systems—such as companies using SharePoint, a document management system and a search system—can see benefits from centrally managing metadata that is sent to many systems

**What is a Taxonomy Site Assessment?**

Before a taxonomy or series of taxonomies can be built and implemented within an organization, a clear understanding of the benefits (and potential drawbacks) of building and using a taxonomy should be explored. Each company and each project has its own set of unique considerations and requirements.

*SchemaLogic offers a way to quickly assess and identify all aspects of a successful taxonomy management solution for any company.*

Usually within 2-3 weeks, we are able to provide a comprehensive examination and evaluation of how information within a company can be better organized and maintained by using taxonomies. We use a project methodology that incorporates interviews, workshops, audits and taxonomy best practices that are relevant for each customer's needs.

During the process, we provide iterative deliverables that are useful for building consensus prior our delivering a final report that contains specific observations, recommendations and industry-related guidance and best practices for implementing a taxonomy into an enterprise.

At the end of the assessment, customers have the information they need to jumpstart a taxonomy project or build a stronger case for taxonomy solution within a larger project, such as a content or document management initiative.

**What benefits does this provide?**

By working hand-in-hand with customers over many years and numerous projects, SchemaLogic has learned that although every situation is unique, most customers have very similar concerns and needs for organizing and finding information.

*SchemaLogic is able to leverage years of experience in the field to offer customers best practices and lessons learned about the hows and whys of managing and using taxonomies.*

Specifically, we help customers benefit from a taxonomy site assessment and roadmap by:

**Gauging organizational readiness for leveraging taxonomies—** Many customers do not know how to determine if they need to start using taxonomies to help identify and organize information. A SchemaLogic consultant can help with a business and technical needs assessment.

**Providing a roadmap for developing and implementing taxonomies—** Once a real need to develop and implement taxonomic structures within their information systems has been identified and quantified, companies often don't have the right personnel in place to design and build out their taxonomies. A SchemaLogic consultant can help define the optimum way for a company to design a taxonomy solution that can satisfy immediate needs while providing ways to implement it across multiple integration points.



**Taxonomy Checkpoint #3:****What kinds of projects need to include taxonomy management?**

- Information management initiatives that involve document, content and records management typically can benefit from included taxonomy management
- Search optimization projects greatly benefit from including taxonomy management because the search engine can show improved results by using managed metadata
- Information system migrations or upgrades can use taxonomy management tools to improved data quality and upgrade information compliance
- Projects requiring that one taxonomy (or different views of a taxonomy) be used in multiple systems

**Delivering a long-term strategy for maintaining taxonomies**— Even before the taxonomies are designed and built, consideration for long-term maintenance should begin. We combine the customer's unique needs with industry best practices to produce a plan for how to maintain the taxonomies post-project in order to reduce maintenance cost and provide greater value in the long term.

**Incorporating taxonomies into other enterprise applications**— Since taxonomies rarely "stand on their own" we provide an actionable plan to incorporate taxonomies into other applications, such as content, document and records management, plus search systems.

**Why use SchemaLogic?**

The SchemaLogic Services group has highly trained, experienced information industry experts who have worked with numerous customers on all levels of taxonomy consulting services, especially during the requirements gathering stage of a taxonomy project.

**Specifically, SchemaLogic consultants can:**

- ❖ **Help identify key business requirements and project drivers**— One of the most cost-effective ways to implement a taxonomy into a larger information management project is to document business requirements that will drive quicker ROI. SchemaLogic consultants have helped dozens of customers gather and define key business requirements that prove the value of adding taxonomy management into larger projects.
- ❖ **Evaluate and develop key internal business workflows**— Oftentimes, companies have overlapping or inefficient workflows for managing information across the enterprise. SchemaLogic consultants can identify outdated or redundant metadata management workflows from multiple systems and help integrate them into a more efficient and streamlined approach to taxonomy management.
- ❖ **Identify and assess a complete integration landscape across an enterprise**— Many enterprise systems can benefit from taxonomy management, but are either disconnected from each other or are simply not compatible to exchange metadata. SchemaLogic enables multiple systems to consume and share metadata, and many companies now benefit from integration work done by SchemaLogic consultants.
- ❖ **Perform content and metadata audits to determine data readiness**— Most companies know they have a problem managing metadata, but don't know where to start or how to take the first step toward controlling their information. SchemaLogic consultants have performed many audits of content repositories and have helped customers determine what content is valuable, and how to turn that content into a more valuable company-wide resource.
- ❖ **Help jumpstart information management projects**— One of the most important parts of any information management project is quickly showing value and benefit to the company. SchemaLogic consultants can provide ways to show immediate gains in productivity and cost reductions through taxonomy management as part of the overall project plan.



#### Taxonomy Checkpoint #4:

#### What kind of immediate impact does a taxonomy site assessment provide?

- Provides clear, concise evaluation of company readiness for taxonomies from a neutral third party
- Enables business units to provide cost and business value rationale for information management projects

#### What are the deliverables?

The following are typical deliverables for a Taxonomy Assessment & Roadmap project:

- ❖ **Taxonomy architecture document**— Describes the overall structure of the proposed taxonomy within the enterprise and the integration points and workflows with other systems within the enterprise. This document also includes any repository audits and user requirements from other consuming systems, such as search and document management.
- ❖ **Taxonomy governance and maintenance recommendations**—Provides advice and best practices for governing and maintaining taxonomies once they're implemented into an enterprise. This document will include industry-specific guidelines, if applicable.
- ❖ **Taxonomy development roadmap**—Since this service offering is meant to be rapidly completed during the early phase of a project, customers will need a plan for not only continuing to develop an approach to implementing taxonomies in their company, they'll also need to have a clear idea of next steps for building out their taxonomies in a management tool, such as SchemaLogic SchemaServer. This document outlines how to do this using a number of different solutions.

#### What is the typical engagement approach?

The timeline for a Taxonomy Site Assessment & Roadmap project is short—typically 2 to 3 weeks. Depending on availability of key stakeholders, project duration may be longer, but the amount of billable time spent on the project is fairly consistent.

Longer timelines have been seen when customers want more information or a deeper understanding of requirements, workflow, integrations or more thorough audits. However, the goal of the project is to quickly provide value and insight, and follow-on projects are recommended if a customer wants to extend the amount and depth of the work.

#### How can you get started?

Customers can contact the Industry Solutions team at SchemaLogic by emailing: [IndustrySolutions@SchemaLogic.com](mailto:IndustrySolutions@SchemaLogic.com)

#### About SchemaLogic, Inc.

Our software provides global companies a powerful and cost-effective approach to dealing with the overwhelming amount of information critical to doing business today. People from diverse groups must be able to access and share information across complex systems throughout their enterprise. In order to do this, descriptions, tags and categorizations of information must be accurate and consistent.

SchemaLogic is the leading provider of metadata management solutions for unstructured content. Metadata management enables findability by organizing the terms, definitions and relationships that describe content. Our solutions extend the value of content management by ensuring that all content is readily found; is consumed in a relevant context; and is protected according to policy. The Company has licensed software to some of the best-known and largest companies in the world, including Associated Press, Chevron, Corbis and Reed Business Information. To learn more about SchemaLogic, please visit [www.schemalogic.com](http://www.schemalogic.com).

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