# CIDM Taxonomy Report

Sabine Ocker Senior Consultant, Comtech Services



# Comtech and CIDM

Over 40 years providing consulting services to information development organizations in all industries around the world







#### Me

24 years in structured markup publishing

- 1 year at Comtech
- 11 years as an IA and metadata maven
- 12 years as DTD developer, trainer, XML consultant, business analyst
- Metadata and Taxonomy focus areas

#### Participants



















**ρ**oly



JOHN DEERE



























#### Participant Org Details



< 10 **17.24%** 



36-50 people 10.34%



11-20 people 13.79%



51-99 people 10.34%



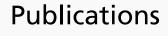
21-35 people 13.79%

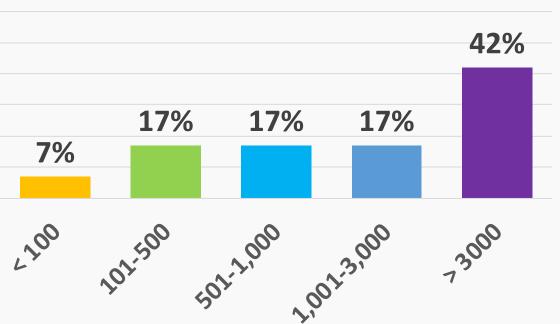


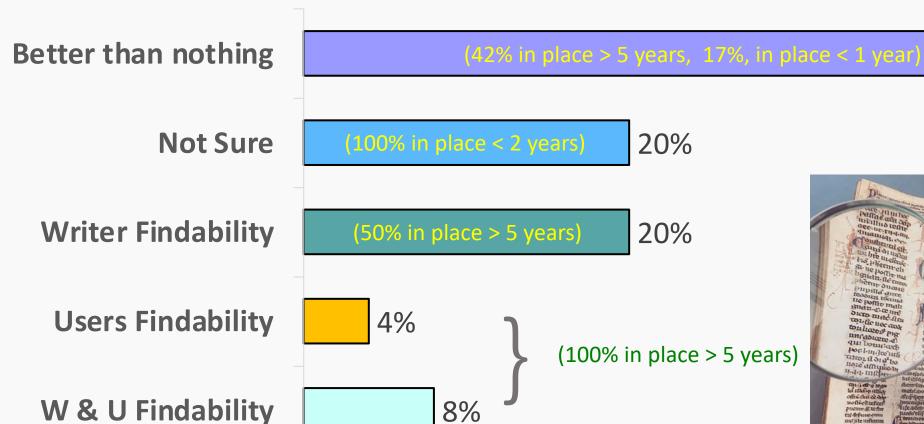
100+ people 34.28%













Is our taxonomy effective?

How long has it been in place?



48%

#### Who?

Edit/Arch/Tax Auto Production Writer \* Metadata: Who, Size, \* \* \* \* \* \* \* \* 17% 13% 39% 91%

Time

#### **How Many Terms?**





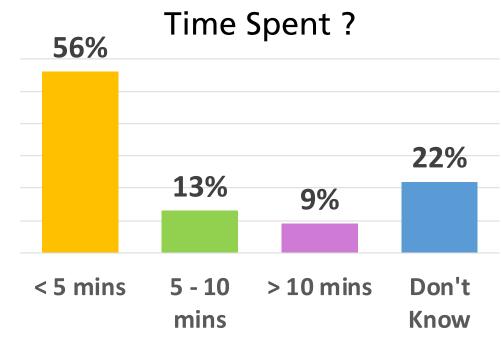


101-999 35%



>1000 15%

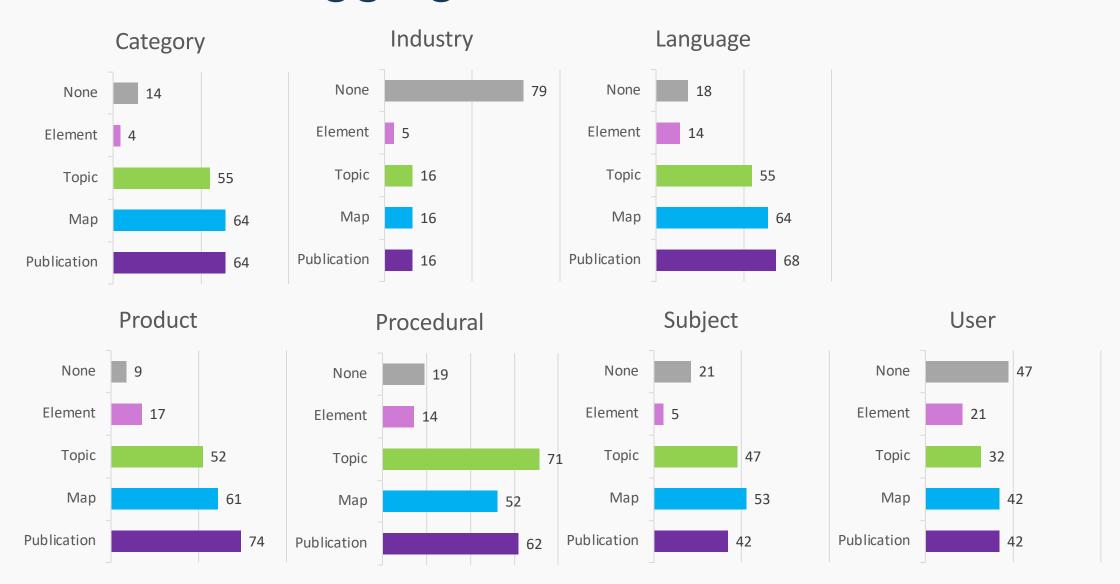
Don't Know: 35%



# Percentage of Tagged Content

	0 %	1 - 25%	26 - 50%	51 - 75%	76 - 99%	100%
Any metadata applied?	13.04%	13.04%	8.70%	4.35%	17.39%	43.48%
All recommended metadata applied?	13.64%	18.18%	9.09%	4.55%	40.91%	13.64%
The correct metadata values applied?	13.64%	18.18%	9.09%	27.27%	22.73%	9.09%
Metadata applied at the correct level?	14.29%	14.29%	14.29%	9.52%	33.33%	14.29%

#### Metadata Tagging: What and Where?





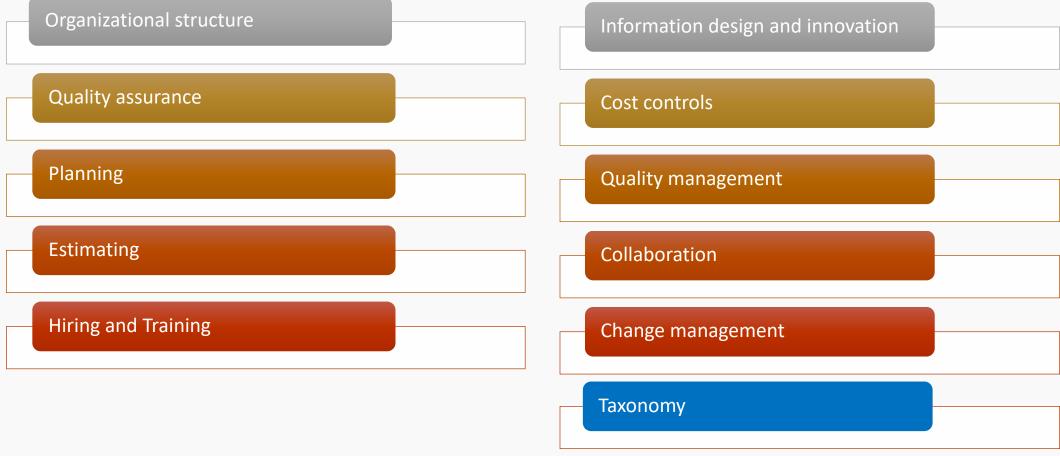
Barriers for those without a enterprise Taxonomy

- 44% it's not a priority
- Lacking proper resources
- No proven ROI
- Tools don't support
- No expertise
- Waiting for Corporate
- No time

 Nobody said.... Lack of agreement on ownership

#### What is the IPMM?

• Describes the practices and behaviors of an information development organization according to a 5-level process maturity scale



### 5 Levels of Maturity



#### Level 1: Ad Hoc

- Highly variable processes applied inconsistently across the organization
- Each group or individual defines own practices and standards



#### Level 2: Rudimentary

- Uniform processes being introduced, but inconsistently applied
- Practices often abandoned under deadline pressure or changing requirements
- Lack of commitment from staff to change their habits



#### Level 3: Organized and repeatable

- Reliable processes in place and consistently followed under the guidance of strong management
- Staff committed to use processes and apply standards even under difficult circumstances



#### Level 4: Managed and sustainable

- Processes are ingrained and institutionalized, followed without the need for management intervention
- Teams actively look for and explore innovative ways for incremental improvements



#### **Level 5: Optimizing**

- Processes and standards regularly reviewed as team continually seeks ways to improve
- Team anticipates the needs of users and the larger organization
- Team seeks alignment with other strategic departments

### Levels of taxonomy maturity

Level 5: Optimizing

Level 4: Managed and sustainable

Level 3: Organized and repeatable

Level 2: Rudimentary

Level 1: Ad-hoc

#### Taxonomy Maturity criteria

Level of management support

Status of taxonomy strategy

Taxonomy spectrum

Metadata enablement

Conformance and validation

**Taxonomy Maintenance** 

Change control/Governance

Retagging of content

Metadata training for writers

Alignment with other groups

### Level of Management Support

#### Level 5:

Level 4: Have upper management support

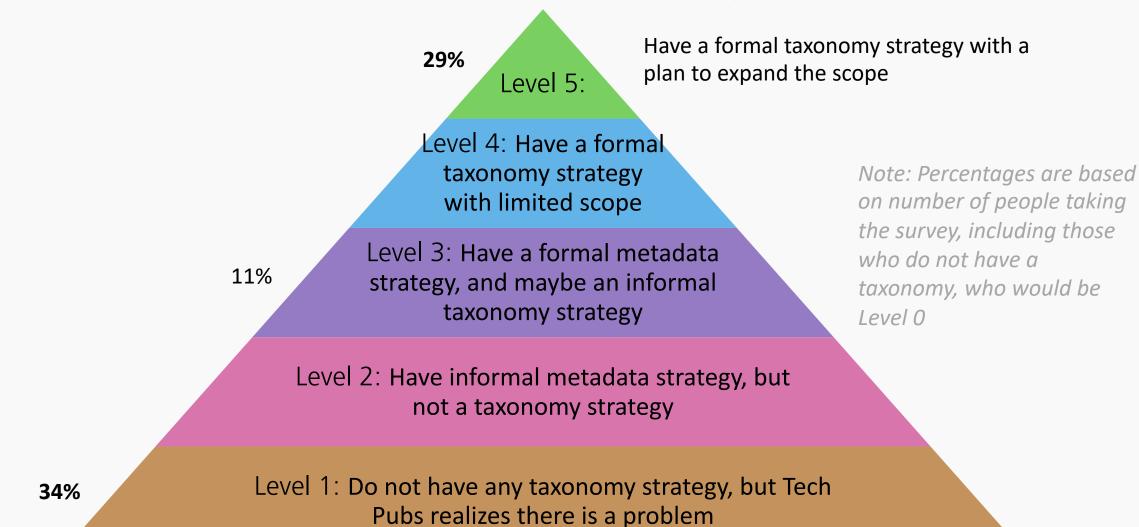
Note: The survey didn't provide data for this area of maturity

Level 3: May have "division" level management support

Level 2: Have Technical Publications management support

Level 1: Most management does not see the value of metadata

## Status of Taxonomy strategy



### Taxonomy Spectrum

Level 5:

Have an ontology, which defines relationships between taxonomies and controlled vocabularies

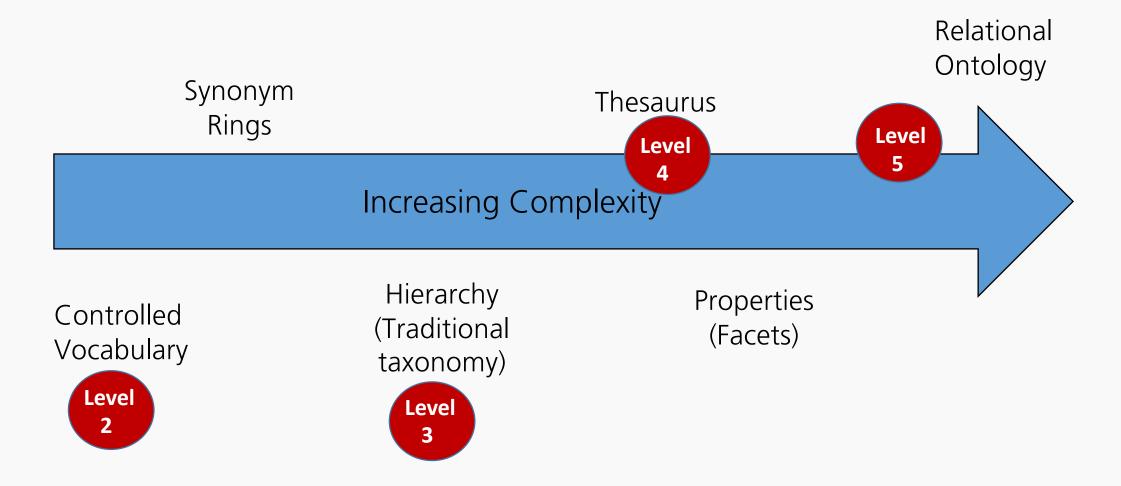
Level 4: Have a thesaurus, which includes term synonyms

Level 3: Have a taxonomy which organizes terms in broader/more narrow hierarchy

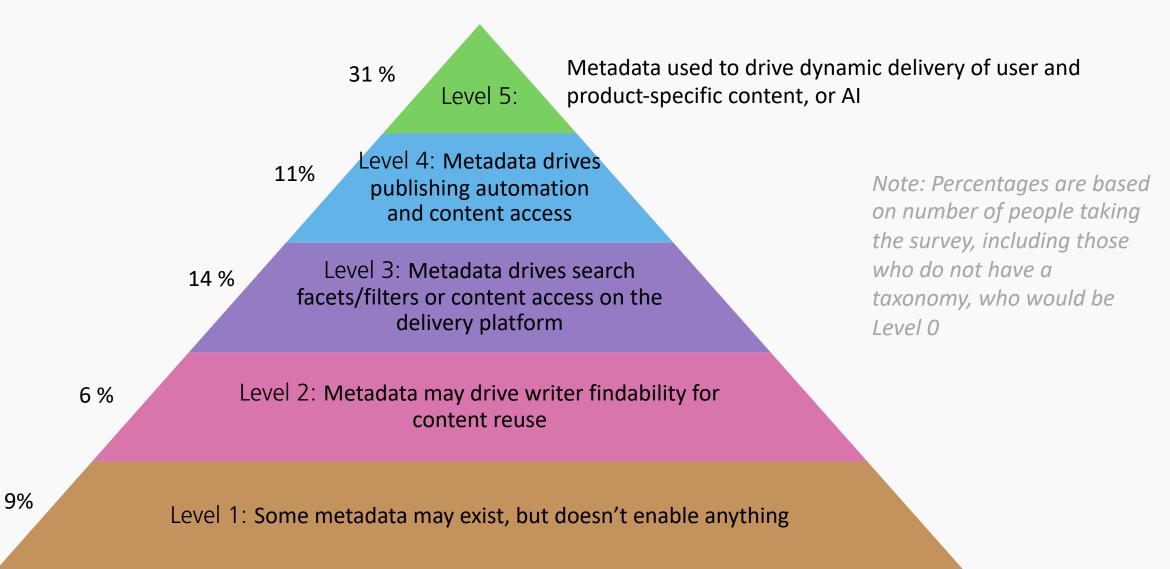
Level 2: Have controlled vocabulary terms in metadata

Level 1: Have controlled vocabulary terms in text

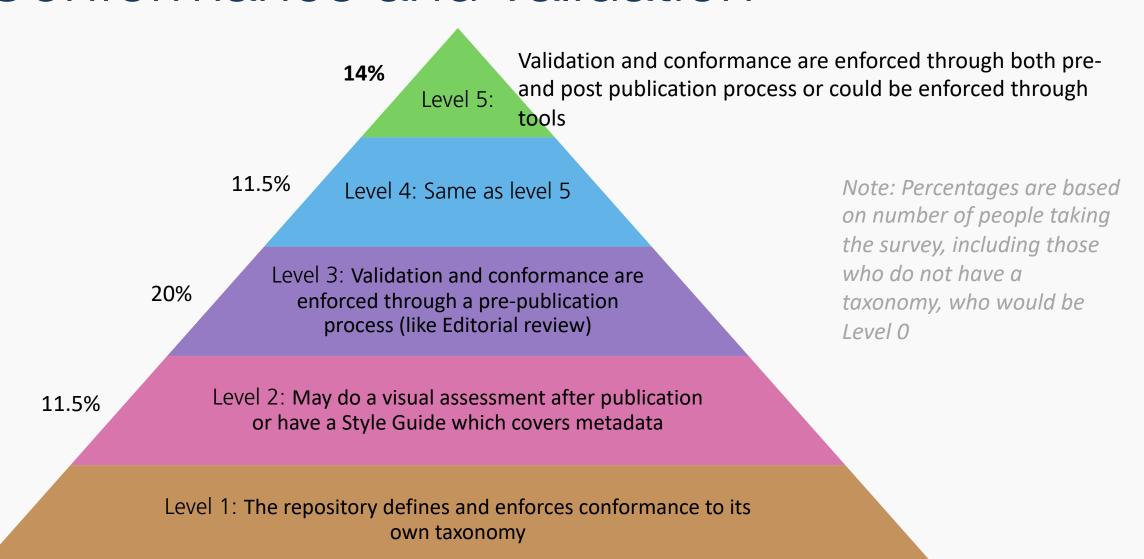
# The Taxonomy Spectrum



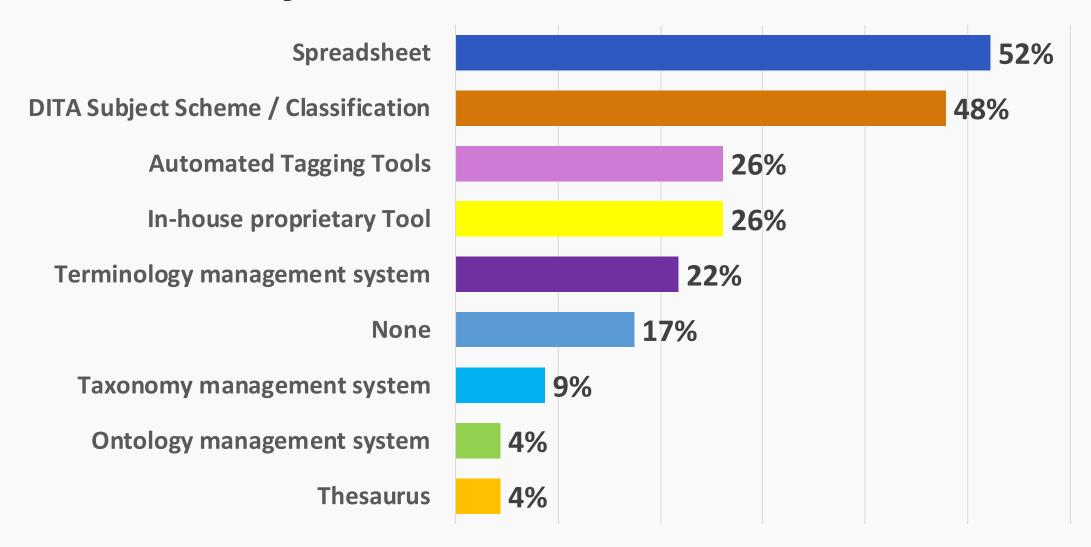
#### Metadata enablement



#### Conformance and validation



### Taxonomy Tools



© 2019 Center for Information Development Management

### Commercial Taxonomy Tools



Semantic Al platform Semaphore





#### Taxonomy maintenance

Level 5: We conduct user testing pre- and post-production regularly

Level 4: Have user feedback mechanisms

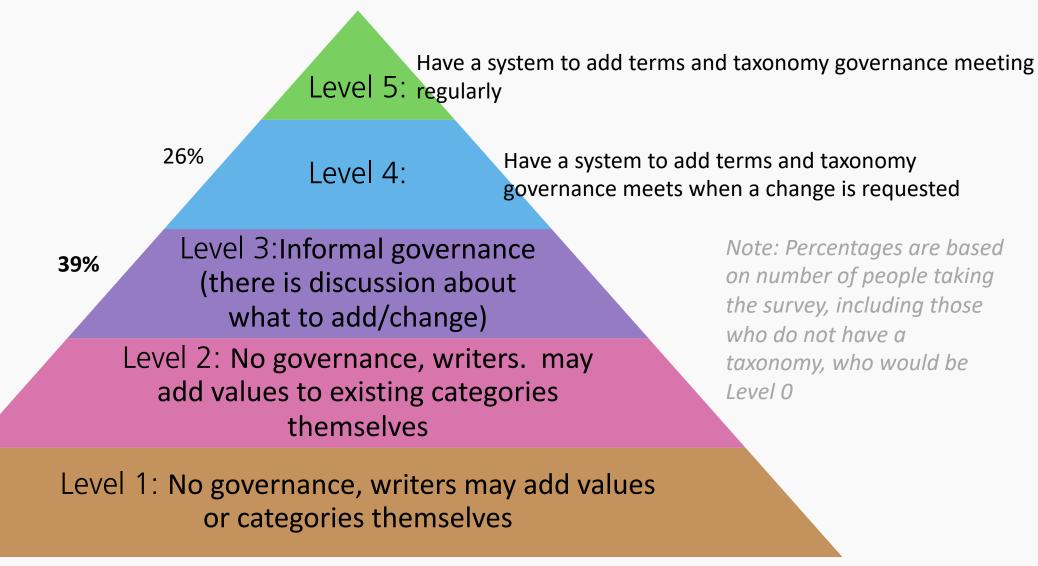
Note: The survey didn't provide data for this area of maturity

Level 3:Conduct informal pre-production testing

Level 2: Monitor web analytics for search terms used and content accessed

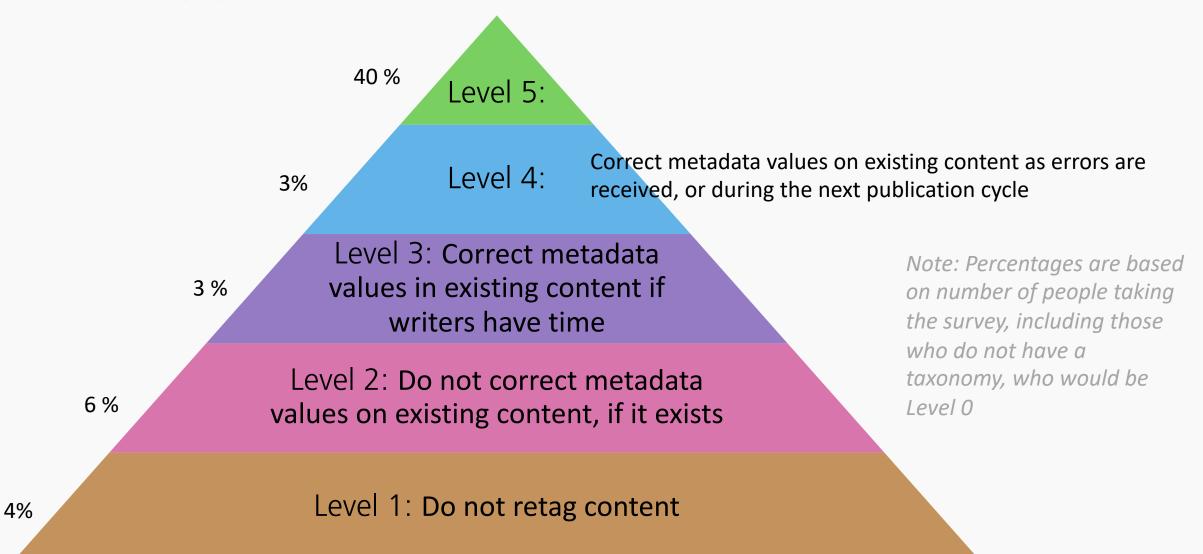
Level 1: Writers determine on their own what need changing

#### Taxonomy Governance

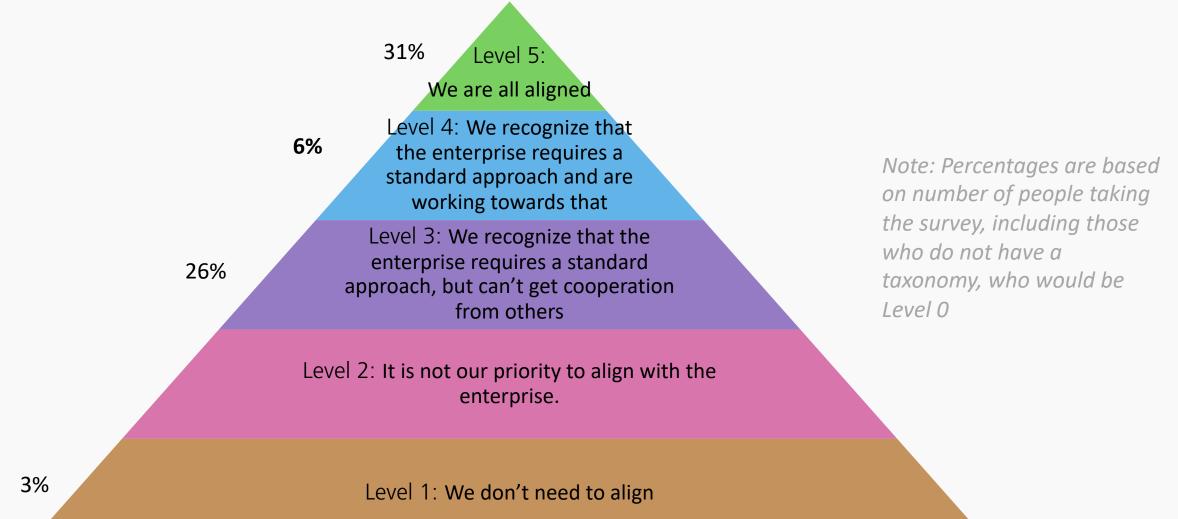


13%

### Retagging Content



## Alignment with other groups



TMM level of participating members

Level 0: 31%

Level 1: 9%

Level 2: 6%

Level 3: 40%

Level 4: 14%

#### Level 3: Organized and Repeatable



May have "division" level management support



Have a Taxonomy (wider/narrower)



Metadata drives search facets/filters or content access on the delivery



Validation and conformance are enforced through a pre-publication process (like Editorial review)



Informal governance (there is discussion about what to add/change)



Recognizes the enterprise requires a standard approach, but can't get cooperation from others.

#### Summary

Working at the Enterprise level is challenging

Most Technical Publications organizations are aware they need something, but resources and management support are not always in place

Some delivery platforms are better than others

Long time structured markup publishing environments use MD for formatting and author findability only