

## How to Determine the Right Type of Taxonomy for Your Business

In order to reap the value of information, we need to be able to access it quickly and easily. Taxonomies provide us with a logical structure for organizing our information, thereby making it quicker and easier to locate and use.

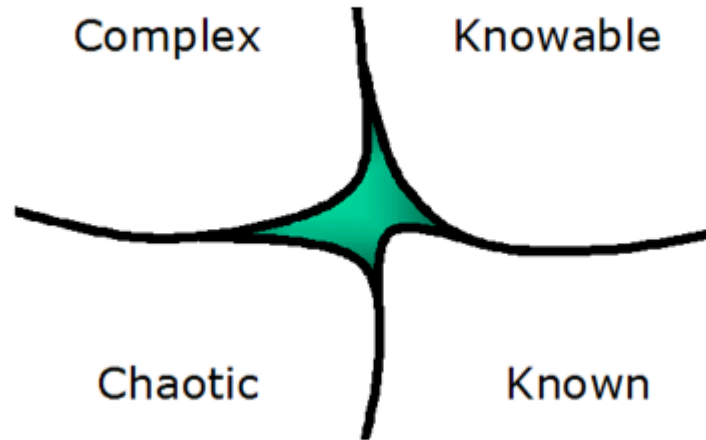
Information is the new currency. Information is critical to the success of organizations. We have so much information to manage and navigate through. In order to reap the value of information, we need to be able to access it quickly and easily. Information, the right information, is powerful. Through the use of taxonomies, we are able to locate the information. This toolkit will walk you through 4 steps to help you identify the right Taxonomy for your business, and get you started on your taxonomy project.

### Step 1: Determine Your Organization's Business Needs

- Review and/or determine the needs of your organization with regard to being able to locate information in a timely manner.
- Link your taxonomy project to the needs of the business using a decision-making framework as shown below.

A common decision making framework is David Snowden's Cynefin Framework, shown below. This framework describes four types of situations that a business faces. It is useful to think about how taxonomy work can help. Assessing a specific business situation, such as breakdowns in how teams exchange information, can help you ensure the development of an effective taxonomy.

## What Situation Are You Serving?



Snowden, David and Boone, Mary, 2007 'A leader's framework for decision making' *Harvard Business Review* November



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### *AIIM Tip*

*Take a moment to think about your organization. When a situation arises, how does the organization react to it? Are situations predictable, chaotic, or difficult to resolve? This can help ensure that your taxonomy will help resolve specific challenges. You may see patterns, such as groups using different terminology for the same or similar types of information or processes. A taxonomy can help standardize how people think and talk about what they are doing.*

### For more information

- [What is Enterprise Content Management?](#)
- [How to Use Metadata and Taxonomies to Improve Access](#)
- [How to Develop Taxonomies](#)
- [Cynefin Framework](#)
- [A Leader's Framework for Decision Making](#)
- [The Cynefin Framework](#)
- [Taxonomy 101: The Basics and Getting Started with Taxonomies](#)
- [Example: Veterans Affairs Categorization Framework](#)

## Step 2: Assess Various, Relevant Business Processes and Situations

In accordance with the framework above, determine whether the situations you are assessing are complex, chaotic, known, or knowable.

Every organization has a different type of situation. What is yours?

- There are known or extremely well understood processes. These are instances where there is a routing, a rule or a procedure to follow.
- There will be situations that need further study and analysis to figure out what the cause-and-effect relationships are.
- There will be situations that are complex and move fast where you cannot figure out what is going on. These will be rare. These are the processes that just require action and quick action.
- There will be processes that take place in your organization that rules will not help and further analysis is of no value either. In these instances, you need to look for patterns in the processes and avoid the patterns that look bad.

### *AIIM Tip*

*This exercise is similar in nature to the previous one but is more focused on the processes within your organization. So, take a few minutes to think about various processes you have in place and which of the categories they fit in.*

### For more information

- [Take the First Step in Improving your Business Process](#)
- [Business Process Management Maturity Assessment Tool](#)
- [What Questions are Used for a Process Audit?](#)
- [Evaluating and Improving Business Process](#)
- [Is your process obvious or chaotic?](#)
- [Complex or chaotic?](#)

### Step 3: Determine the Purpose of Your Taxonomy

Purpose of Taxonomy	When Taxonomy Should Focus on this Purpose
Provide structure and organization	Use when systems and content are already very stable and well documented.
Establish common ground	Beneficial when people are physically separated, working on different teams but sharing the same functional roles.
Span boundaries	Useful when sharing information and knowledge between differing teams.
Improve understanding	Beneficial when you want to establish a framework to interpret what is completely unknown.
Discover and illuminate	Use to gain usable insights into complex problems.

While you are determining the appropriate type of taxonomy to be used in your organization, you should also consider whether you will have a single or multiple taxonomies. You may need a single taxonomy for the entire organization to ensure consistency and agreement across groups, systems, and processes. However, business units, teams, and smaller groups may need separate taxonomies to support their unique requirements and processes, including such unique terms and concepts into the corporate taxonomy can actually create more confusion!

#### *AIIM Tip*

*For your taxonomy to be useful, it needs to be linked tightly to your organization's goals and needs. Make sure you review your organization's goals and needs before making a final selection.*

#### For more information

- [What Taxonomy Structures are Available](#)
- [9 Keys to a Successful Taxonomy](#)
- [What is the purpose of hierarchical taxonomy?](#)
- [Creating a Purpose-Driven Taxonomy](#)
- [5 Types of Taxonomies: From List to Ontologies](#)
- [Taxonomies & Controlled Vocabularies](#)

## Step 4: Identifying the Right Taxonomy

One or more types of taxonomies, shown below, should apply to the situation you are working to improve.

Type of Taxonomy	Description
Tree Structure	Provides a hierarchical arrangement of terms. These are easy to develop.
Facet	Used for more complex information environments where there are significant differences in perspective and in how individuals want to organize and approach their information.
Frameworks and Matrices	Beneficial for understanding what is not completely know. Matrices organize and visually sort information into broad patterns that may be more useful than trees.
Maps	Often used as brainstorm maps of a given topic that may be used to create a taxonomy structure.

### *AIIM Tip*

*As you are working on your taxonomy, try to negotiate a taxonomy that all the different teams in your organization can agree upon. Start by documenting the differing perspectives and then negotiate a shared view that everyone can use. Document the specialized language used by people in your organization so that you can incorporate it into your taxonomy. As you document the terms used by people in your organization, you will then be able to begin mapping the relationships between the terms used in the various work groups throughout your organization.*

### For more information

- [Taxonomy and Metadata Training Course](#)
- [Four Challenges of Taxonomy Management](#)
- [Determining the Right Form for your Taxonomy](#)
- [Understanding Taxonomy](#)
- [Tap the Hidden Value of your Information with Better Classification and Taxonomy](#)
- [Harness Information for Business Opportunity](#)