Planning taxonomy content - strategy guidelines and tips

Read this if you're in the process of planning to implement a taxonomy in your organization.

Basic guidelines

Try to keep taxonomies less than 4 levels deep

This may not be possible in all cases; certain disciplines may require a more comprehensive layout, but generally speaking a wide/shallow taxonomy is easier to navigate than one which is narrow and deep.

Have at least two entries in every sub category

If a sub category only contains a single entry, consider moving it up a level.

Be sufficient in each category to warrant its existence

If categories overlap or don't quite "fit", consider changing it. Don't forget to ask the users of the system where they expect to find things!

Balance breadth and depth

This point coincides with the first one. Not all taxonomies can be wide and shallow, but you should try to find a good balance that users will enjoy working with. By creating a far too comprehensive taxonomy you risk creating a "shelf baby" - a system that nobody wants to use because of its sheer complexity.

Finally:

Ask yourself (or better, the users of the system): Can you reach your objective in three clicks?

Building a taxonomy - Where to start?

When building a taxonomy for your business' DAM system, there are basically three options:
Build your own

This is very common. Sometimes it may even be essential because there's no existing content out there that can be reused. However, it may not always be ideal as it requires you to start at square 1.

If you choose to go down this route try to get a bird’s eye perspective. Which categories make sense, which will users understand? Don’t try to make a taxonomy that fits your content, as this will typically create a far too complex taxonomy.

Defining the world’s most sophisticated taxonomy is little help if users don’t find the terms meaningful or can’t tell in which node the term they’re looking for can be found.

Often, hiring a librarian to help build the taxonomy will be a great help, and certainly worth the investment. They are experts at organizing content and know the routines for making content available and understandable by users.

Start with an industry standard and maybe extend it

If you choose this option, hiring a librarian to tweak the content of the taxonomy can be very helpful indeed. Starting out with an industry standard can certainly be a quicker way to get started, but typically there will be a need to adjust terms by expanding or reducing the taxonomy to fit the precise needs of your business.

License a commercially available taxonomy

This may be a costlier alternative initially, but it will probably save money in the long run as less modification is needed to adapt it to your business. Not all businesses can use this option since there may not be a commercially available taxonomy for their line of work.

Strategy points

These strategy points can be an aid to understanding how users interact with the DAM system and how to best build a taxonomy that users will enjoy.

User behavior

Make use of search logs, observations and user interviews. Doing that will help you define what users think they will search for and what they actually do search for.

Survey content

Get examples from users of the documents and content they believe are critical. This can help you map out what their common objectives are. Review file servers, sharepoint sites etc and see how content is currently organized.

The plan is not to replicate all of it in the DAM system but to see if there are any “trends” that can tell you how users think about their assets.
Knowledge Audit

Knowledge audit implies looking for info and putting it in context.

Examples: Current, out of date, to be migrated, organized/not organized, ownership, lifecycle.

Define audiences

Who are your audiences, what do they need?

When users come to the site, what are they thinking and how do they approach the task at hand?

Try to decipher their “line of thought”. What’s their thinking process? What do they expect to find and where?

Organize terms:

Look for themes – what are the high level concepts?

How do terms relate? Are they related by process/workflow or by concept? There may not be single answer to this – you may find yourself switching back and forth between organizing things conceptually and according to task.

Get agreement on the terms that will be the official terms.

Create a "straw man"

A straw man is an example meant to be criticized. Let people try it out and use it as a reference point.

It may take several passes of trial and error to get to the final result.

Review terms with users. Do they make sense, are they useful? Descriptive? Complete, precise?

Is everything placed right? What’s missing?

Finally, a guiding principle:

Keep it simple! Making a too complex setup will invariably produce a taxonomy that is very fine grained, but maybe too fine for users to feel comfortable with. This could easily turn into a "shelf baby", a system that nobody wants to use for its sheer complexity, or for its lack of practical purpose.