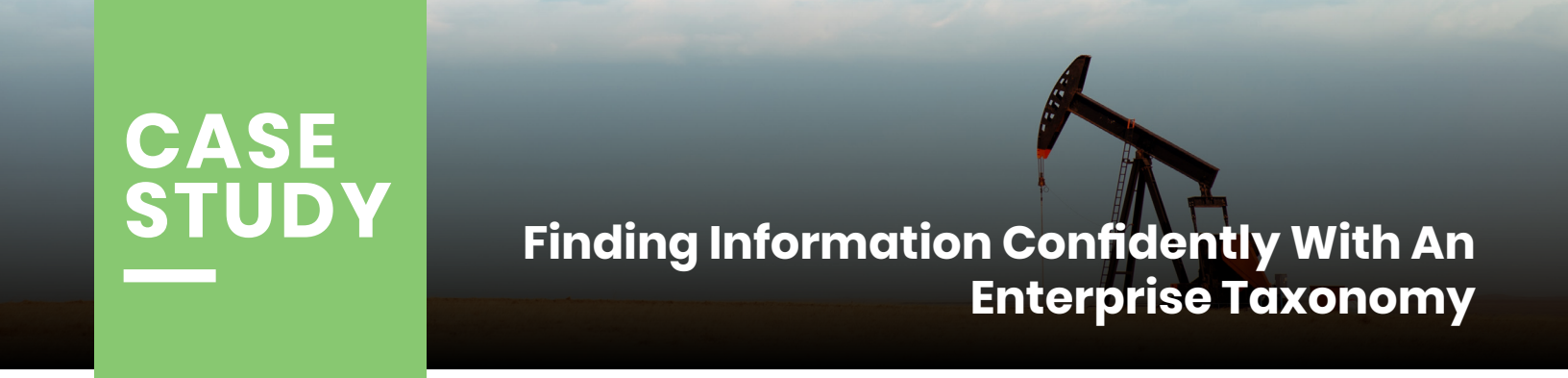
CASE STUDY



Finding Information Confidently With An Enterprise Taxonomy

INDUSTRY
Energy

COUNTRY
USA

Access Sciences

SEARCHING IS AN ACTIVITY; FINDING IS AN ACCOMPLISHMENT!

As with many global organizations, this client had assets and offices in many countries without consistency regarding where information was stored and how it was organized. Employees were frustrated by the amount of time required to find information. In cases where the hunt was unsuccessful, money was spent to recreate content they knew already existed 'somewhere,' and in cases where the search was successful, there was little confidence that the most recent, trusted version had been found.

With business decisions riding on potentially outdated or incomplete information, our client realized something must be done.

SERVICES DELIVERED:

- Current State Analysis
- Metadata Modeling
- Policy and Process Development
- Records Management
- Taxonomy Development
- Training Strategy and Curriculum

ISSUES

- ☑ Finding information takes too long
- ☑ Costly re-creation of content because it can't be found
- ☑ Lack of consistency across repositories prevented users from finding content

This situation also made it difficult to dispose of content no longer needed while demonstrating compliance with their records management policies and regulatory requirements. The resulting accumulation of redundant, outdated, or trivial (ROT) content compounded the problem of finding the current, trusted version of a document.

Knowing that information reliability, findability, and life-cycle management could be improved if each content management system shared the same information architecture, the client

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engaged Access Sciences to develop an enterprise taxonomy to facilitate cross-functional content findability, accommodate the business usage needs of individual departments across their repositories, and enable the defensible disposition of content no longer needed.

AN ENTERPRISE TAXONOMY PROVIDES A CONSISTENT WAY TO CLASSIFY AND FIND INFORMATION

To develop the taxonomy, we worked with client subject matter experts to understand how the different groups worked with their information in support of business processes and decision making. This understanding enabled us to identify the key information (facets and terms) employees had available to them in order to search for content, regardless of whether the content was in their department repository or created by another department.

Once we had a working start on the facets and terms of the taxonomy, we conducted sessions with over 30 functional work groups to test their accuracy and make improvements. We did our testing by having the creators and users of the content answer the following questions:

- Can you use these terms to classify your content?
- Can you find what you need even if your department hasn't created the content?
- Is the terminology familiar to you?
- Are there ways we can automate and streamline the classification process?

SOLUTION

☑ Enterprise taxonomy supportive of department operations and records life-cycle management requirements

BENEFITS

☑ Consistent information architecture across all content management systems

☑ Improved findability

☑ Increased confidence in records management compliance

Once our design and testing sessions were finished, we incorporated records management policy requirements into the taxonomy, designed a governance structure and policy to maintain the taxonomy going forward, and provided the client with an on-line survey and video presentation to allow them to solicit additional global feedback.

INFORMATION ACCESSED

As a result of this effort…

- The client has a vetted, enterprise

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taxonomy representing its culture, terminology, and how it conceptualizes its work

- Employees now have a consistent means to find and manage information both across the enterprise and within departments regardless of location or system
- Classified information is tied to records policies so it can be defensibly disposed and managed

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