

Team Building & Project Management

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Lynda Moulton

LWM Technology Services

Contact: lmoulton@lwmtechnology.com

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25 minutes is too short for robust storytelling. First though, I want to get a sense of the audience.

Why are you here? Speaker? 4 On a taxonomy team? 50+ Plan to be involved in a team effort? 50+ Other 15 (academic, student, thinking about whether this type of approach makes sense to organizing a project, etc.)

Make a note to yourself: What is your competency as it relates to taxonomies? Why are you involved? Why does your organization really need or want a taxonomy?

You may want to revisit your notes after the talk and upgrade your personal and professional asset list after you have learned new reasons for your involvement. You also might want to re-think your organizational needs for this effort - OR NOT.



This slides shows values, roles and personality attributes that stand out as key concepts to consider. They were assembled after contributing as a leader to 7 taxonomy or thesaurus building efforts over the past 30 + years - large chemical company, professional services consulting firm, large petroleum exploration company, a department of the US Navy, a federally funded research laboratory, a computer hardware and software company and as a contributor to my own corporation's taxonomy for testing the software we built for building taxonomies. Also, as a contributor to over two dozen other projects for clients using my software. They reflect both necessary conditions and all too frequently absent conditions that proved troublesome if no fatal to projects.

All are ingredients for success but three are most important:

Vision - clear

Expectations - unequivocal and often repeated

Authority - must be present in the members, for the team as a whole in order for authoritativeness to be present in the result.

Who Belongs on the Team?

- Deep and broad understanding of the organization and target content domain
- Collaborative and communicative
- Expert researchers
- Decisive Structuralists (efficient)
- Flexible and practical
- Subject Matter Experts and User Advocates

This is a checklist of competencies that you want to attract

Let me explain these two:

Decisive structuralists

Flexible and practical

Roles and Competencies

Management competencies

- CKO
- Intranet development manager
- Web design or CMS system manager

Technical competencies

- Information science/library science
- Search expertise
- Computer science & search technology

Subject matter experts

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Here is another way of segmenting the team

Several competencies from the previous slide may be present in any one member BUT you need at least one person in each of these categories:

Manager, Technically competent in building taxonomies, a Subject Matter expert

It is rare to find a professional who can manage the projects, knows the subject matter in depth, and has time and personality to do term crunching.

Personalities: *Obsessors* and Stressors

Good taxonomy builders have to be at least a little bit obsessive

Good subject matter experts (SMEs) must have practical perspective

Good Business and IT managers need to continually stress the goals, establish roadmaps and facilitate to achieve concrete milestones

Obsessors - researchers who will dig deeply into subject matter domains for the right language

SMEs - need to be practical and representative

Managers - pushing the goals, stressing milestones & benchmarks. Must focus on the business goals.

What is the Goal? And Why?

- Navigated search?*
- Authority control for validating metadata?*
- Automatic categorization?*
- Manual indexing?*
- Directory of products?*
- Speed retrieval and focus (cluster) results*
- Leveraging content for more innovation?*
- Getting customers right products?*
- ...*

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Ideally, taxonomies would be built systemically from the beginning of an organizations mission. How many here are in a startup situation? 2

Not surprising.

They never are and the nature of these efforts is retrospective "playing catch up" which requires framing the project appropriately and realistically for the vast scope you are often faced with.

Here is a hierarchy of candidate reasons. At any point that your project falls in this list you might ask, "WHY?" At each point as you move closer to the bottom, you get closer to the business justification, which is where you need to be.

In a current project for the computer company the complexity of the product mix and huge diversity of the terminology used for the same product among clients and internal staff developers or support personnel was making searching for the exact product on the company Web sites impossible. It was absolutely necessary to normalize on one name or label for each product with appropriate cross-referencing from the others. If prospects could find the right product and order it with a known name or if support personnel could not reference by the commercial name - there can be major service issues and lost sales opportunities. This is a major business issue.

*...the success of the project
depends on ...*

- Clarity of Mission
- People Involved
- Sustained Support from Management
- Authority of Team members and
Authoritativeness of the end Product

AUTHORITY builds TRUST

Let's cycle back mentally to the concepts on Slide 2, lest we lose the thread.

Success for the project = Vision communicated to management with realistic expectations and build with authoritativeness.

If the vision that is communicated lacks a convincing business expectation, you are treading on thin ice and in trouble. You need to re-focus and adjust if you find this is the case.

That's how you build a trusted system.

How: Discovery & Mapping

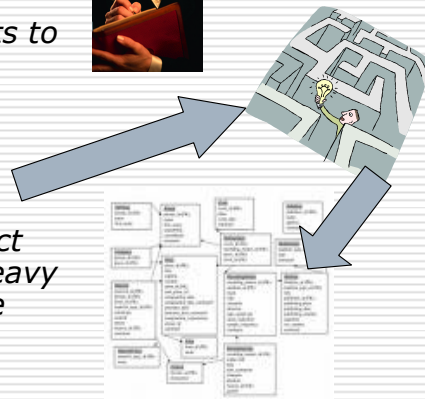
Meet with key users (knowledge consumers, unit managers, marketing, and IT personnel) to identify needs



Interview subject matter experts to harvest language

Sort, validate and structure terminology (Formulate top categories and create term relationships)

Solicit reviewers (original subject matter experts and other heavy users) to test your language



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How does a team get the job done?

Here is how I managed two large projects one for the department in the Navy and one for a FFRDC.

One pass through the process is never enough - you need to iterate, usually multiple times.

Leadership Role: A documenter, communicator, negotiator

- Documenting
- Finding the barriers and breakdowns
- Lobbying and managing expectations
- Researching technologies
- Bridging the communications gap among the interested parties
- Consulting and managing change
- Interpreting & Defining: content capture, organization and retrieval in terms that others understand

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What was my role as leader?

A lot more than calling meetings and charting a course.

Maintaining control

Boosting energy and commitment

Reminding people that you know this is hard stuff and requires focus and time -
acknowledge and reassure with empathy and reasons for doing the project

Rewarding participants with recognition

Spending time with team members in mini-meetings, debriefings, coaching
sessions offering anecdotes of experience (with humor)

And all of these points on the slide...

Leadership and Team Building

Short Term:

Look for a quick win –make a statement

Engage managers and key knowledge advocates, contributors and team candidates to discover pain points, risks, strategize solutions

Find partners to initiate collaboration, find buy-in for ideas, and advise

Long Term:

Build a sustainable process

Cultivate your multi-disciplinary team by guiding and coaching

Point people need to be in place to advocate at all critical levels of management – where the power resides

Maintain relationships to other projects

To keep it moving, leaders need their own checklist. Here is a typical list of short term focus with a framework for where we need to get in the long term.

Finding the Potential Break Points

- IT infrastructure: information flow
 - Virtual environment pressures – new language, new domains, new content
 - Resource sharing shifts
 - People and positions may disappear or new ones appear
 - Geography
 - Cultural mergers – making them work
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You are going to have rough spots.

You can't predict what will happen but can use this as another checklist of places things often get hung up.

Every one of my engagements suffered glitches due to one or more of these situations.

Anticipating & Planning for Change

- Mergers, Acquisitions, or Strategic Partnerships
- Major customers experience major change
- Disruptive technology or innovation upsets your markets
- How will your knowledge base change – content categories, contributors?
- Who will be the key experts?
- Where will expertise be needed?
- What will be the focus?

Devote some thought to building a mental model for how any of these events will require adaptation.

For each situation be able to answer these questions.

Leadership is the Key to Sustaining the Project

If **the leader** is respected, valued, and a visible part of the effort the team will deliver.

The leader needs to be the advocate and catalyst for sustaining the energy - moving the project forward and knowing when to pass the baton.

If you are the current leader or aspire to that role, empower yourself with these reminders.

Communication is the Glue

Communication mechanisms: Training, Hot Tips, Lunch Seminars, Virtual 'featured speaker' meeting, visit and engage managers, blogs or threaded email lists, weekly team briefings

- ❑ Lay down projected outcomes in clear, simple messages (e.g. "we are going to create a finding tool that is quick and easy for our customers.")
- ❑ Correct misunderstandings - guide
- ❑ Provide Help on how to use the available technology
- ❑ Create transparency by sharing insights and guiding to key resources (people and places)
- ❑ Establish clear guidelines to set the stage for ongoing governance
- ❑ Be accessible to team members one-on-one & give mini-coaching sessions that stimulate sharing of ideas

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I think of leadership as being the chief communicator.

No communication from the chief out of the team is a killer for projects.

You need to be seen, heard, and communicating through multiple channels.

You must be a strong and convincing presence.

Plan for the Roll-out and Sustaining Program

- ❑ Establish an ongoing governance model – Guidelines and Standards
- ❑ Solicit and invite input from a wide audience - capture it
- ❑ Set up activities and messages to engage reviewers and stimulate their ongoing contributions (contests, mind exercises)
- ❑ Do the same for users - keep learning where value can be created

In summary

You need to be thinking all along how to create a system that includes a plan for an ongoing concern.

Don't shortchange the potential for creating a legacy process that is well entrenched and can live on after you pass the baton.

The End

Thank you for listening and learning

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Here is a partial bibliography of some helpful articles. You will find others in the bibliography on my Web site. As well, look at <http://www.kmforum.org> for the Boston KM Forum. In the Archives are readings and presentations for many programs that relate to taxonomy projects.