

# INFO CAROLINA 2012

**factor**<sup>TM</sup>

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# Gary Carlson



## Roles:

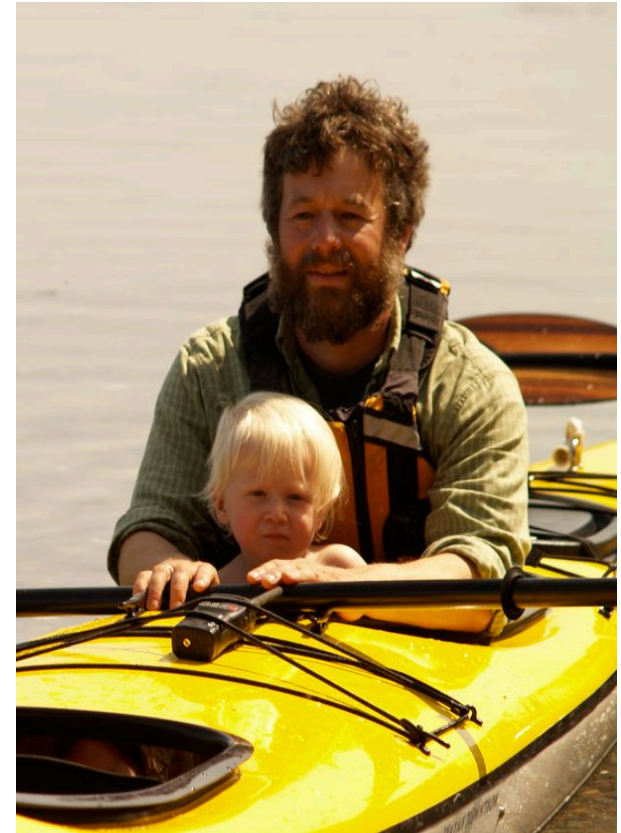
consultant  
taxonomist  
product manager

## Services:

- Information Strategy
- Taxonomy Management
- RFP Development
- Taxonomy Assessments and Workshops
- Business Case Development

## Tags:

taxonomy, information management, content management, knowledge management, e-commerce and intranet, SharePoint, Ontologies, healthcare, finance, etc.



The many elements of Content Strategy can be divided into two general areas, ***Editorial Content Strategy*** and ***Technical Content Strategy***.

## Content Strategy

### Editorial

- Message and Voice
- User Experience
- Content Creation
- Content Approve/Release
- Search Strategy

### Technical

- Taxonomy Design
- Metadata Design
- Search Implementation
- Systems Integration
- Performance Optimization



<http://nichewhite.wordpress.com/2010/07/29/the-yin-to-his-yang/>

This is an incomplete sample of standard deliverables for from taxonomy and UX projects. We'll go through these tonight.

<b>Taxonomy</b>	<b>UX</b>
Taxonomies	Personas
Governance Plans	Experience Maps, Journey Map
Infrastructure Specifications	Prototypes or Wireframes



## SUSAN MILLER

PRIMARY USER | Patient Care: a new patient with medical insurance

### INFORMATION NEEDS:

- learn about medical condition, symptoms, possible treatments, patient advice, etc.
- find out which UW Medicine facilities / clinics offer services related to heart disease
- find out which physicians work in the heart disease field
- find out how to make an appointment with her preferred physician at her preferred location
- explore any other patient resources that may be helpful to her needs

### In the future:

- find out more about billing details regarding her procedure
- prescription refills
- schedule appointments
- pay bills



### GENERAL

Female, 50, local

### TECHNOLOGY

Intermediate, internet user, social media awareness, preferred platform unknown

### PATIENT

New (present and future), health insured, specialty care

### UW

No affiliation with UW

This Persona Example is the property of University of Washington Medicine

# UX

## Common Taxonomies found in personas:

- Stage of life
- Geography / Location
- Specialties
- Types of products / services they desire / interact with
- Areas of interest
- Common channels they interact with
- Technical Level
- User Segment
- Gender
- Goals
- Etc

The taxonomies and how they are going to be used and related are often surfaced in the persona definition

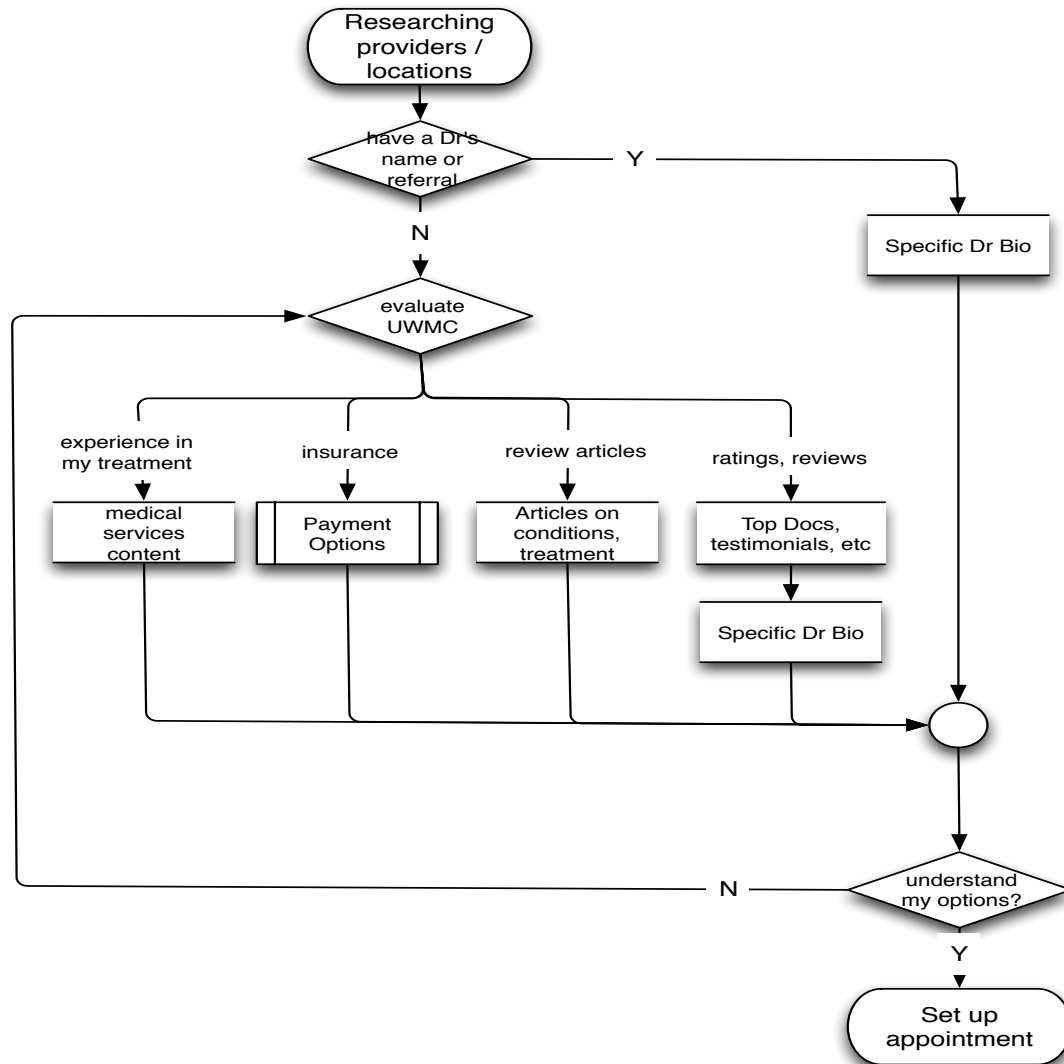


# Experience Map

<b>Before Care</b>	<b>During Care</b>	<b>After Care</b>
Affording Care	Appointment & Procedure Preparation	Appointment & Procedure Follow-up
Researching Care	Appointment & Procedure	Future Care
Finding Services		Feedback and Advocacy
Get Support		Billing

# Sample Key Path/Interaction Flow

## RESEARCHING CARE



## **Interactions** dependent on information delivery

- Example – Susan was looking for a clinic that focused on “specialty A” near “location B”... Implies that the search tool or clinic locator must be able to utilize a common set of specialties and locations that are used in the other systems as well.

## **Content types**

- Example – “Susan was looking for an FAQ...” Content Type = “FAQ”

## **Information and relationships** and dependencies

- Example – People need to find services by customer goal and location (so the services must be linked to the geography taxonomy and the goals or goals and locations must be linked explicitly)

## **Frequency of use / or change**

- Example – ‘Products are re-branded every year...’ taxonomy must allow for product re-naming and track previous product names

[Patient Care](#) [Research](#) [Education](#)

## UW Medicine

### Find Care

[Learn about conditions and care](#)

[Find a care provider](#)

[Make an appointment](#)

[Get help and support](#)

### UW Medicine's Services

[Regional Heart Center](#)

[Harborview's Level I Trauma Center](#)

[Airlift Northwest](#)

[All Services...](#)

### Your UW Medicine Appointment

[UW Medicine Locations](#)

[What to expect](#)

[How to prepare](#)

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### Paying for Care

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### eCare

With eCare you can set up alerts, contact a provider, refill prescriptions and more.

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[See a list of all conditions and treatments](#)

## Conditions

### [Mitral Valve Disease](#)<sup>2</sup>

This condition causes the mitral valve to wear out more frequently than its corresponding valve in the heart's right side.

### [Congenital Heart Disease](#)<sup>3</sup>

At least 1 million adults in the United States have congenital heart defects. They are not typical patients with disease – instead, their problems involve physiological abnormalities of the heart and its blood vessels.

### [Coronary Artery Disease](#)<sup>1</sup>

Coronary arteries supply the heart muscle with oxygen and nutrition so it can pump blood to the rest of the body. The narrowing and blockage of these blood vessels, commonly called coronary artery disease, is responsible for heart attacks and heart pain (angina).

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Content Types

Taxonomies

Search requirements

- “search box”
- Search driven content presentation

Content and Taxonomy relationships

Relationships between taxonomies



# Taxonomy

# Taxonomy – Boring Definition

Collection of terms and relationships between terms used to describe a domain. (And hopefully created to address a real business problem)

ANSI Thesaurus

Traditional BT/NT taxonomy

Controlled Vocabularies

Ontologies

Controlled value lists

Folksonomies?

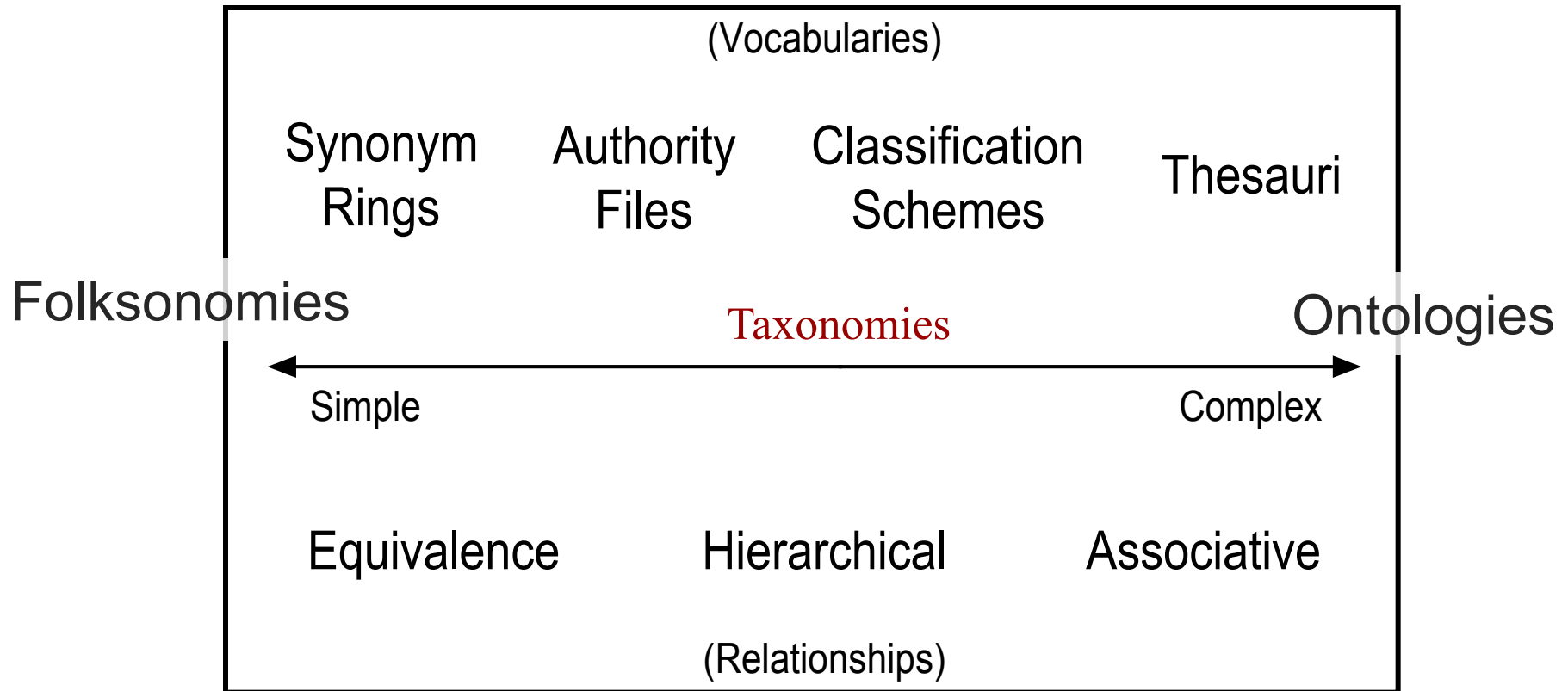
etc

Terms or relationships may or may not have rich attributes associated with them

*OK, maybe a less boring definition...*

- This is a codification of a companies expertise as it relates to products customers, workflows, business constraints, etc.
- Taxonomies and attributes are designed to bridge the gap between content and customer
- Directly support revenue, brand health and operational efficiency
- This is a highly relevant and valuable corporate asset that requires:
  - Tools to support it
  - Staffing to maintain it
  - Governance procedures
  - Visualization tools
  - etc

# A Simpler View



*From Rosenfeld, L. & P. Morville. (2002). Chapter 9, "Thesauri, Controlled Vocabularies, and Metadata" in Information Architecture for the World Wide Web. 2nd ed. Sebastopol, CA: O'Reilly. (p. 176-208).*

## Information model support of the information delivery

- Do all the taxonomies exist and are they up to date?
- Is the appropriate governance in place to keep them up to date?
- Does their content and design support the use cases?

## Relationships between taxonomies and content modeling

- Are the relationships well enough defined to be applied to the concepts Are the resources (people and technology) in place to maintain the relationships?

## Information model support for all the values needed to support the experience

- Are the taxonomies at the right level of granularity?
- Are the taxonomy terms presented in a way that people can understand?  
Language, Technical level, Geographically or culturally relevant

**Gaps in any of these may have an impact on the user experience that is created**



Frequency of update of the taxonomy?

Types of changes that can be supported?

Can the desired relationships between taxonomies and content be managed?

Legal/Regulatory constraints?

Can the model be delivered to the consuming systems

Can the infrastructure model all of the requirements

- Synonyms
- Relationships between terms
- Relationships between taxonomies

Are the tools accessible to business users and technical owners

Can updates to the information model be made in a timely fashion (as identified in the UX)

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## Taxonomies:

- Medical Conditions
- Medical Symptoms
- Treatments?
- Medical fields or specialties
- Location
- Goals

## Content Types:

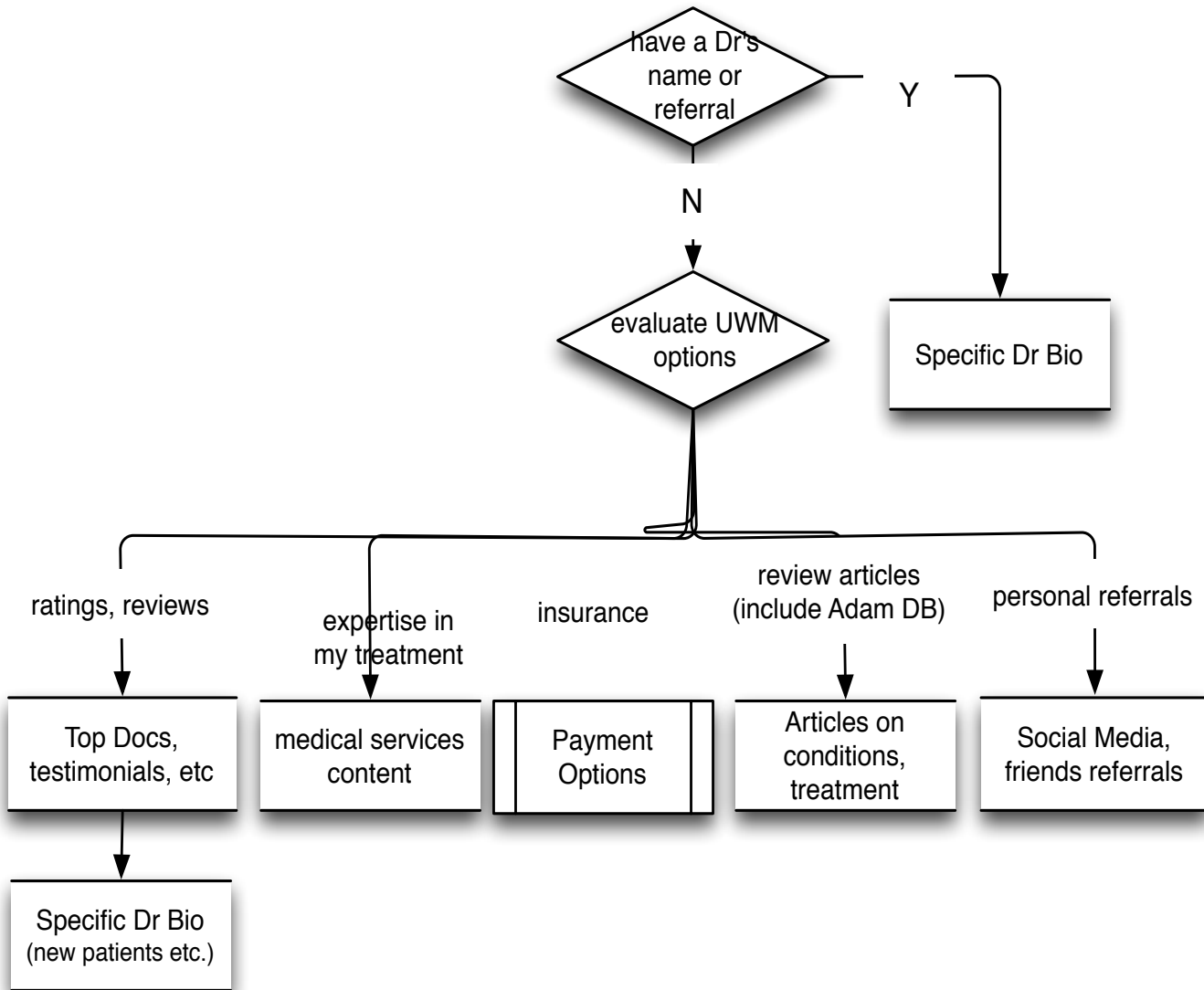
- Patient Advice
- Facilities/clinics
- Physician Bios

**Functionality** that needs to be supported with metadata:

- Clinic locator
- Search by taxonomies
- Make an Appointment
- Prescription refill

# Sample Key Path/Interaction Flow

## Researching providers / locations



For each doctor the following metadata is required:  
**Ratings, Expertise, Insurance plans.**

Articles by **condition** and **treatment** will be required.

**Expertise, conditions and treatment** will all need to be related and managed so as to drive consistency.

Clinical trials need to be identified by **condition** and **treatment**. Clinical trials will need additional info about **dates**, and whether or not they are **open** to new participants.

**Content Types** = Articles, Ratings, Dr Bio, On-line forms



# Example – Technical Infrastructure

RootExcel	Level 1	Level 2 (class)	Level 3 (leaf)
Automotive	AutomotiveBasics	Alarms,Locks,Security	
Automotive	AutomotiveBasics	Alarms,Locks,Security	RemoteStart
Automotive	AutomotiveBasics	Alarms,Locks,Security	SecurityUniversalLocks
Automotive	AutomotiveBasics	Alarms,Locks,Security	SecurityVehicleSpecificLocks
Automotive	AutomotiveBasics	Audio,Video,Electronics	
Automotive	AutomotiveBasics	Audio,Video,Electronics	Audio,Video,UniversalUse
Automotive	AutomotiveBasics	Audio,Video,Electronics	Audio,Video,VehicleSpecific
Automotive	AutomotiveBasics	Audio,Video,Electronics	CellularAccessories
Automotive	AutomotiveBasics	Audio,Video,Electronics	GlobalPositioningSystems
Automotive	AutomotiveBasics	Audio,Video,Electronics	NavigationSystems
Automotive	AutomotiveBasics	Audio,Video,Electronics	PowerAccessories
Automotive	AutomotiveBasics	Audio,Video,Electronics	RadarDetectors
Automotive	AutomotiveBasics	AutomotiveCollectibles	
Automotive	AutomotiveBasics	AutomotiveCollectibles	GeneralApparel
Automotive	AutomotiveBasics	AutomotiveCollectibles	KeyChains
Automotive	AutomotiveBasics	AutomotiveCollectibles	Mugs
Automotive	AutomotiveBasics	AutomotiveCollectibles	RacingSuits
Automotive	AutomotiveBasics	AutomotiveCollectibles	SpecialtyCollectibles

## Excel as Taxonomy Tool

- Ubiquitous – everyone knows how to use it
- Easy to use
- Relationships very difficult to manage
- Change Management difficult
- Term re-use very difficult

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# Questions?

# Thank You

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