

Transforming a Tangled Web of Marketing Systems Into a Lean and Sustainable Enterprise Asset



Introduction

Information is an invaluable asset, but only if it's easily accessible and interpretable. Technology can generate priceless insights; it can also overwhelm organizations with continual, and often discordant, streams of information. For many organizations, the time and effort employed to find, calibrate, and analyze data may neutralize—or negate—any data-driven benefits.



Who We Are

Factor is an information architecture consultancy based in Seattle. We help companies of all sizes gain control over their endlessly-evolving stores of information and content. With expertise in information science, taxonomy, information architecture (IA), and user- and consumer-experience design, we architect and implement information management structures that empower businesses to quickly understand how to make informed decisions. Our clients' current and future business objectives guide our efforts at every stage of the process.



Our Capabilities

A typically comprehensive and impactful recent engagement was for a multinational Fortune 50 company. Despite a \$2 billion budget and a vast suite of cutting-edge marketing systems, our client struggled to employ marketing data effectively. We advanced the functionality of the company's marketing technologies so that marketers could act upon wise, data-driven insights during the planning, execution, and review of marketing campaigns. We successfully

- Aligned twenty-six discrete marketing systems
- Designed an IA infrastructure to support current and future information needs
- Created an enterprise-level taxonomy asset
- Enabled real-time visibility into the success (or failure) of marketing campaigns.

The Challenge

Senior executives from our client's marketing division—who were tasked with managing its sizeable marketing budget—wanted to know how marketing campaigns were performing relative to business goals across web, paid media, search engine marketing, and social media channels. The information needed to answer this seemingly straightforward question, however, was buried. Relevant data was deeply embedded within marketing systems and scattered across both internal departments and external agencies. It took weeks or months, no less than five agencies, and a mob of employees to provide a response—and a questionable one at that—to the executives' request. Despite investing tens of millions

were using] different and inconsistent taxonomies to describe the same concepts across systems. It was taking a team of people several weeks to cobble together the data to present to executives.”

Our client identified more than nineteen distinct taxonomies in use across its twenty-six marketing systems. The size and scope of such a large taxonomy initiative warranted outside help, so the company sought Factor's expertise. “We were dealing with a drunken bowl of spaghetti,” said Gary Carlson, Principal, Factor, after reviewing a visual diagram of the disarray.

“Despite their enormous marketing budget, best of breed technology, executive support, and substantial staff, calculating campaign ROIs and evaluating marketing channels was a challenge for our client.”

Gary Carlson, Principal, Factor

of dollars in cutting-edge marketing technologies, executives could not effectively report, at a high level, on the impacts of the company's marketing activities.

Our client recognized that the source of their problem was not an IT/technology integration issue (i.e., the inability to integrate disparate technologies), but instead a failure to organize, manage, and share information from disparate sources. “We did not have standard naming conventions in place for marketing terms,” said our client's taxonomy strategist. “[We

“But I was confident that our methodology, which we've fine-tuned over the course of many client engagements, would support a project of this magnitude.”

All Factor clients benefit from the robust, proven process we have developed for IA projects. Our process involves three steps—assessment, roadmap, and modeling—and addresses taxonomy challenges of all sizes.

Phase One

Assessing Our Client's Existing Taxonomy

“Let's examine the world as it exists, so we can define the world as it should be.”

Bram Wessel, Principal, Factor

During the first phase of the process our goal was to understand how our client's taxonomy problems hindered their business efforts. For three months, we met with marketing, technology, and finance teams to gain a deep understanding of the company's marketing technologies. Our due diligence helped us create a map of the client's nineteen marketing taxonomies, and their relationships to each other.

Pinpointing the Problem

The assessment revealed the true scope and nature of the client's problem: there was significant redundancy, overlap, and incongruity among their

taxonomies. “One group defined marketing campaigns as units of marketing initiatives,” said Gary Carlson, “while another designated marketing initiatives as units of marketing campaigns.” These types of redundancies were invisible to the company's mostly-autonomous business units.

As we know from our experience with other projects, the solution to redundant and overlapping taxonomies is an enterprise-level classification system. A good classification system should dictate which taxonomies must be managed at the enterprise level and which should be managed as discrete units. Yet, reorganizing a company's existing taxonomy is a significant undertaking, and one that many executives, fearing disruption, hesitate to initiate.

We believe a carefully-architected approach to information management is a truly valuable company

Phase One (cont.)

asset, one that is comparable to a company's intellectual property (IP) or IT infrastructure. Like IP, efficient and effective use of information can drive organizational alignment, inform company strategy, and generate current and future economic benefits.

Educating Employees

Educating stakeholders was a critical component of the assessment phase. We have learned from experience that the more thoroughly employees understand what IA is, and how it will help them and the business, the more likely they are to support and tolerate disruptions.

In this company's case, newly standardized

taxonomies had to align with taxonomies in use in other parts of the organization. This would provide the sought-after "lead through revenue" perspective. As we shared our vision across departments, however, we encountered resistance; many stakeholders, unaware of redundancies, wondered why functioning systems would need to change. It is an art to navigate internal tensions and politics, but Factor helped the company cultivate a shared vision of the future. Together with stakeholders across departments, we developed a model, termed the Campaign Information Model, that created a consistent vocabulary and terminology for future marketing campaigns.

Phase Two Developing the Roadmap

“[Factor's roadmap] gave our organization clarity around how to prioritize and sequence our work.”

Taxonomy Strategist, Client Company

Once our assessment of the client's marketing landscape was complete, the project moved into the roadmap phase. This is where we were able to translate our newly-gleaned information and insights into an enterprise-wide agenda—or roadmap—for the project. At a high level, the roadmap forecasted what capabilities, exactly, the company would need to harness and employ its data effectively; it also helped IT and business executives determine where to allocate funds and resources. At a more granular level, the roadmap defined and assigned every task involved in the year-long taxonomy project.

We create client-specific roadmaps for each engagement we undertake. Key capabilities in this client's roadmap included the following:

Strategy

- Strategy defines (1) what information will be managed as an enterprise asset, (2) what skills and resources are needed to manage the information asset, and (3) what skills and resources are needed to integrate the asset throughout the organization durably and sustainably.

Governance

- Governance, or the set of guidelines a company needs to manage its assets and infrastructure now and in the future, is a critical component of strategy.
- Through education, we helped this company embrace new taxonomy guidelines so they could use the system in perpetuity.

Modeling

- We created a detailed, enterprise-wide organizational system to serve the company's employees today and in the future.

Implementation

- We allocated resources to test our theories, including running proofs of concept to validate the model, before implementation started.
- Our testing and validation ensured that ongoing and future maintenance efforts would succeed.

Phase Three Modeling the Solution

A successful enterprise scale project must address a company's overarching business needs as well as the needs of interfacing departments. Our thorough assessment helped us understand the company's full set of requirements and create a detailed and responsive IA model. The model communicated the information infrastructure necessary to support

enterprise-level analytics and reporting requirements. It not only enabled employees' systems to access and share, quickly and efficiently, a consistent and coherent set of marketing information, but also provided individual business units with the flexibility they needed to meet differentiating goals.

The Result

Efficient, Data-Driven Decisions

“One voice, one vocabulary, aligning on a unified purpose across the enterprise.”

Gary Carlson, Principal, Factor

Over the course of twelve months, we advanced our client’s information capabilities to serve their business more efficiently. While remaining on time and within budget, we helped the company shift from a widely distributed set of twenty-six information assets to a streamlined model of “taxonomy as a service.” Today, our client’s newly-implemented enterprise taxonomy responds to information requests accurately and quickly; information that once took days, weeks, or months to compile is now available at a moment’s notice.

Typically our clients see a return on their investment within months—this project was no exception. For some, the financial benefits take the form of heightened employee efficiency—there’s no need for multiple teams to manually track down and calibrate data, for example. Others derive financial benefits by using newly-gleaned information to fine-tune their marketing campaigns or target customers.

Our approach to designing and implementing an enterprise taxonomy can be applied beyond analytics. Thanks to our recent and successful collaboration, our client plans to work with us on several initiatives outside of marketing, such as improving search functionality on the company’s website.

Factor’s Methodology for IA Clients

Three distinct steps frame our approach to information architecture projects of all sizes:



Assessment

What is the existing state of our client’s information assets?

We use the overall business case as the lens to focus our assessments. Exploring end-user needs also helps us find solutions in unexpected places.

Roadmap

What are the information capabilities our client needs to support business goals?

We consider all the capabilities our client will need to support business goals, including information models, governance and maintenance, staffing, and navigation of internal politics.

Modeling

What information architecture will meet the organization’s needs now and in the future, at every level?

Our models are built to balance current and future business goals, technical and organizational readiness capabilities, and governance needs.