



Learn to **trust** your data.



ESSENTIAL TAXONOMY Governance Workbook

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About This Workbook

Is your organization running like a well-oiled machine, or does it feel more like a series of heroic rescue missions? Before you can build a resilient data governance program, you have to understand your current state.

This workbook is designed to help you do exactly that.

Whether you're a seasoned taxonomist, an exec who works with data, or simply curious about how structured information can be better managed across your organization, this resource will guide you through evaluating your current governance practices and help you plan for what's next.

You'll walk away with a snapshot of your current state, a better grasp of your organizational needs, and a practical action plan to mature your taxonomy governance capabilities.

Let's dive in!

Taxonomy 101

At its core, a taxonomy is a structured collection of terms and the relationships between them. This collection of terms describes a specific domain, but we'll unpack *domains* later.

You'll find taxonomies at work in all kinds of places: powering website navigation, tagging content, structuring metadata, and enabling smarter search and discovery.

You may also hear the term *information modeling* used to describe both the process of building taxonomies and the broader systems they support. It's the art (and science) of making information make sense.

Taxonomies can be managed using tools as simple as spreadsheets or as robust as enterprise-grade software platforms. The right approach depends on your organization's complexity, scale, and maturity.

Answer a few questions on the next page to start mapping out how taxonomies currently function in your organization.

What business functions or outcomes do your taxonomies support? (e.g., search, personalization, analytics, workflow automation)

How long have your taxonomies been in place, and how often are they updated? (Consider both legacy systems and newer efforts.)

What tools or platforms do you use to manage your taxonomies?

What policies, standards, or guidelines exist around taxonomy use and management? Are they widely followed?

What decisions, rules, or information delivery needs are dependent on taxonomy values?

Taxonomy Governance Maturity

The exact capabilities your taxonomy can support (personalization, content reuse, advanced analytics, etc.) are closely tied to how mature your taxonomy governance program is.

In other words, better governance leads to better outcomes. Orgs with mature governance programs tend to implement a broader range of maintenance strategies, including:

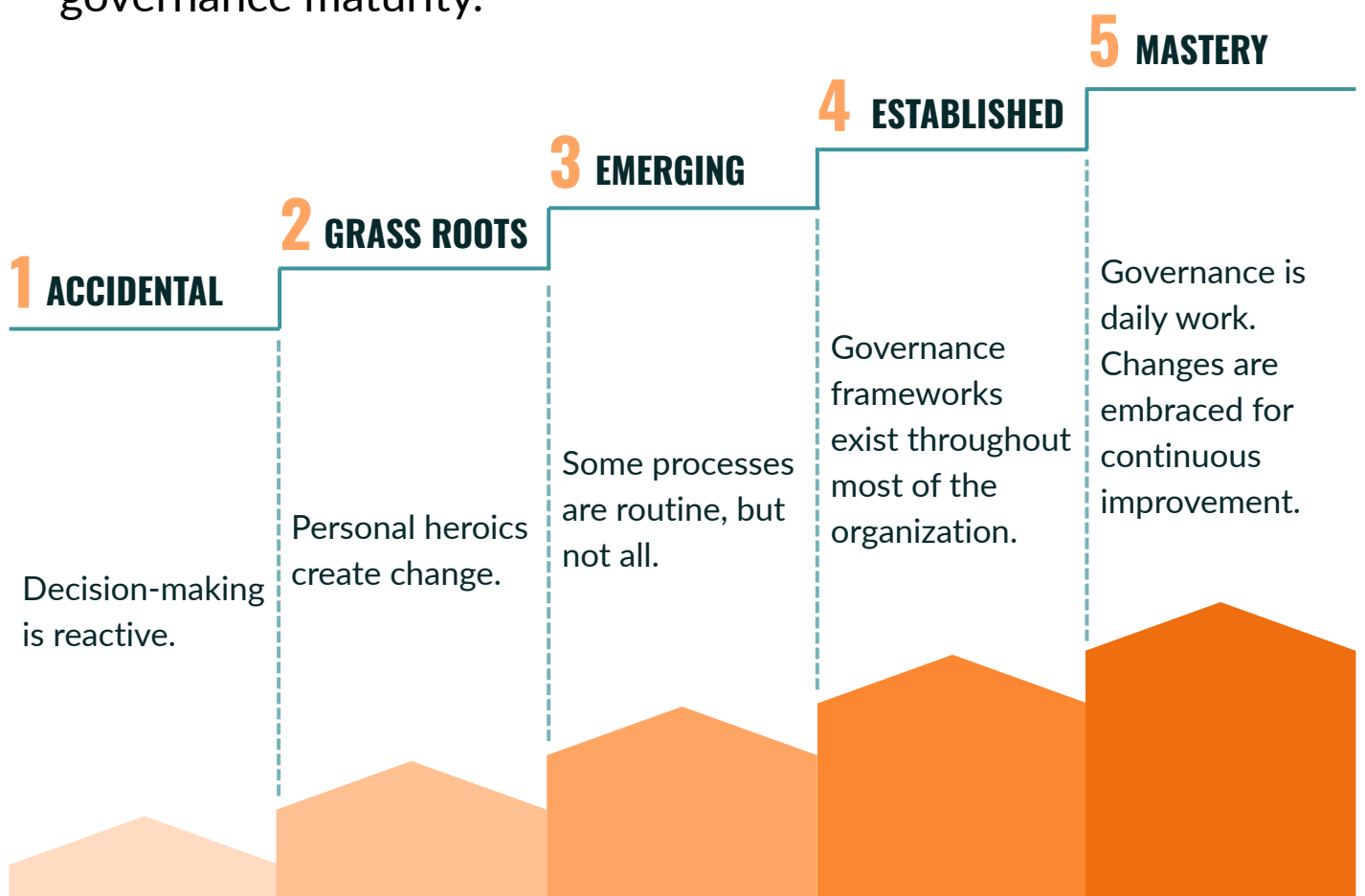
- Use of taxonomy management software
- Regularly scheduled taxonomy updates
- Centralized governance documentation and scalable enablement

Your current level of maturity depends on many factors: team capacity, available tools, executive buy-in, and organizational priorities, to name a few. The good news is that maturity isn't fixed and can be improved by working through the exercises in this workbook.

With the right focus and investment, you can always level up and avoid sliding backward.

Stages of Taxonomy Governance Maturity

Use this scale to assess your current level of taxonomy governance maturity.



Where does your organization currently fall on the maturity scale?
What factors or experiences influenced your answer?

Based on your maturity self-assessment, use this page to set a clear goal for where you'd like your organization to be. The aim isn't perfection; it's progress toward stronger, more sustainable taxonomy governance.

What is your goal for this workbook? (e.g., build buy-in, standardize terminology, reduce duplication, etc.)

What business problem are you trying to solve through better taxonomy governance?

What does success look like 6-12 months from now? Be specific about a measurable outcome you'd like to see.

Who needs to be on board to make that success possible?
Think stakeholders, decision-makers, implementers, etc.

The 5 Components of Taxonomy Governance

Taxonomy governance can be complex, but it doesn't have to be overwhelming. We break it down into five essential components to help organizations focus their resources wisely and engage the right stakeholders at the right time.

Most people won't touch every component, but everyone can influence at least one.



Domains



Systems



Roles



Actions



Communication

Which of these components do you have the most influence over?
(Consider where your voice carries weight or where you can advocate for change.)

Domains (what is being modeled)

For our purposes, the domain is the conceptual area that needs to be organized and managed by the taxonomy. For example, if the domain is "countries" we can create a definition that determines which geographic areas should be included and which should not (i.e. "Iraq" would be included, but "Mesopotamia" would not.) The resulting list of geographic areas ("Iraq," "Japan," "Lesotho," etc.) is your taxonomy.

Use these questions for each domain with which you're working.

- **What is included in this domain? What's excluded?**
- **Are there standards or guidelines for how the domain should be used?**
- **Who owns or interacts with this domain across business workflows (front-end) and technical workflows (back-end)?**
- **In what systems/sites is the domain stored, managed, and applied?**
- **How big is it? Think volume, complexity, and rate of change.**

Domain Catalog

Use this reference table to guide your evaluation of each domain. We recommend creating your own spreadsheet or similar system to document this information in a consistent format.

Domain Name	The label used to identify the domain.
Domain Descriptions	Describes what the domain contains and what it excludes.
Usage Notes	Describes how the information object is intended to be applied.
Business Owner	Group that is ultimately responsible for the contents and management of the information object.
System of Record	Where the information object is stored and managed.
Size	Should include the number of terms and relationships.
Types of Terms	Describes the different classes of terms. This may include synonyms, preferred terms, lead nodes, etc.
Types of Relationships	Describes the different ways that terms will be explicitly related and the business rules driving them.
Term Attributes Required	Metadata associated with each term. At a minimum each term requires a label, but there are generally scope notes, IDs, usage notes, and administrative metadata.
Governance / Maintenance	The different processes, roles, and approvals required to make changes to the information object.
Frequency of Update	Related to Governance above, this describes how often the information object will be modified. Do the changes occur hourly, daily, weekly, monthly, etc? Include the update timelines required by consuming systems.
Roles	User profiles interacting with the information object.
Systems / Sites	Systems and sites consuming all or a defined subset of the information object.

Domains

Systems

Roles

Actions

Communication

Systems (where it's being modeled)

The *systems* that interact with your domains have a huge impact on how taxonomies are applied, maintained, and scaled.

Evaluating these systems will help you understand how information flows and where friction might arise across workflows.

Use the questions below to assess each system involved.

- What's the system called (include aliases and nicknames)?
- What types of information does it store, generate, or consume?
- What are the system's core capabilities? Where does it shine, and where does it lack functionality your domain needs?
- Who's adding or editing information to the system?
- How does it manage data? Can users create, edit, delete, tag, or otherwise manipulate information?

System Catalog

Use this reference table to guide your evaluation of each system. We recommend creating your own spreadsheet or similar system to document this information in a consistent format.

System Name	Excel, Synaptica, CRM, Salesforce, etc.
System Description	Include an overview of the type of information in the system.
Taxonomy Modeling Capabilities	What can it manage? Hierarchies, lists, relationships, etc.
Inputs	How can the content and taxonomy be added (manually or programmatically)? Can it be done by a business user?
Outputs	Capabilities for sharing the content and taxonomy information.
Actions	How does the system allow you to create, access, update, manage, or otherwise manipulate the information?
Content	Description of the type of information that is stored, generated, or used by the system.

Roles (who contributes to the modeling)

Understanding which *roles*, or people, interact with a domain helps clarify use cases, surface governance requirements, and shape the domain itself (like determining required attributes or the depth of a hierarchy).

Most taxonomy programs involve multiple roles across business and technical teams. Use the prompts below to assess each relevant role.

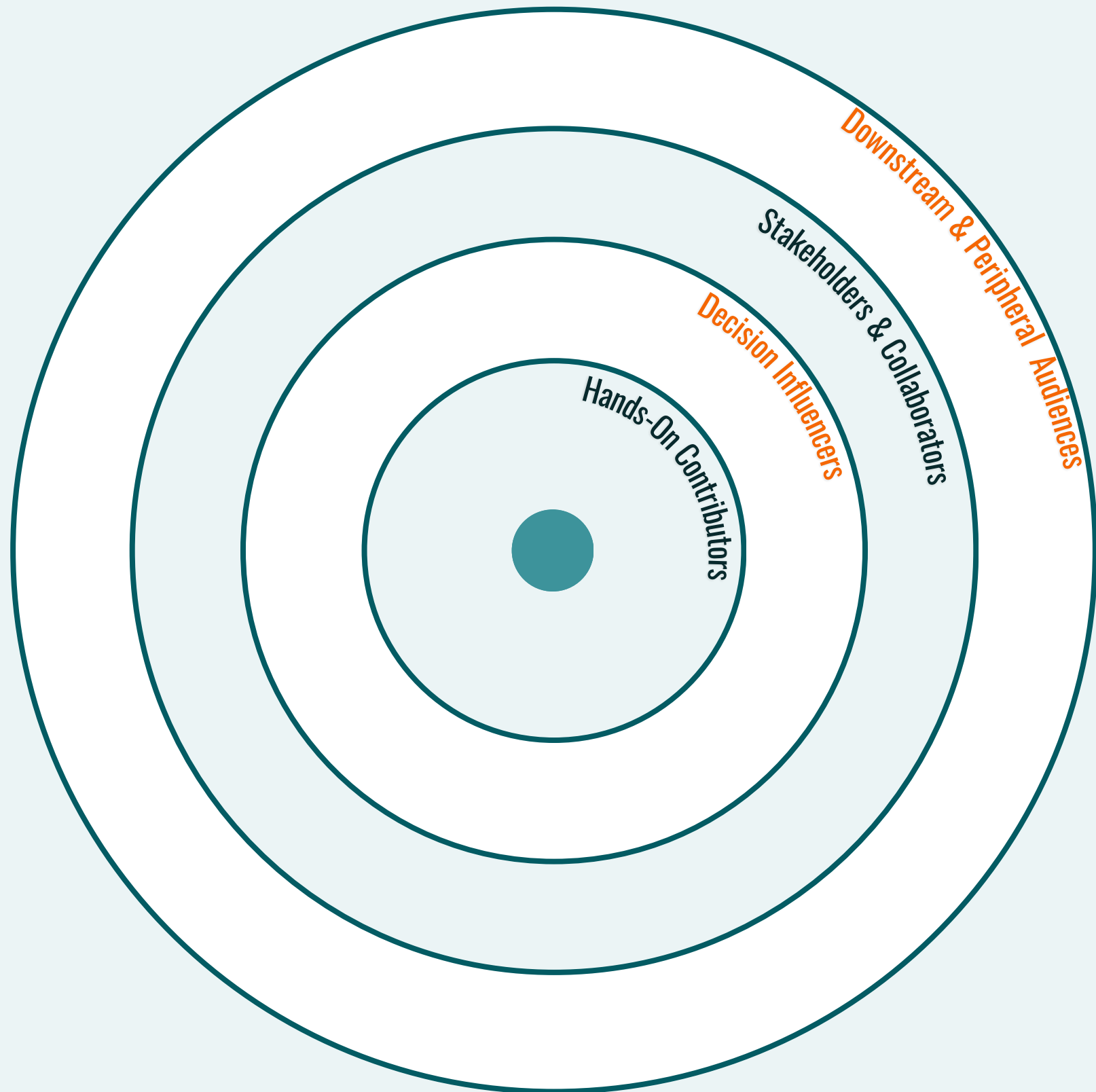
- What are the formal and informal titles of the role?
- How does this role engage with the domain?
- How frequently do they interact with the relevant information? Is it cyclical or workflow-dependent?
- What level of technical knowledge is required?

Role Catalog

Use this reference table to guide your evaluation of each role. We recommend creating your own spreadsheet or similar system to document this information in a consistent format.

Role Name	Taxonomist, DBA, Business User, Executive, etc.
Role Description	Business-level description of the role interacting with the information.
Level of Interaction	Read only, can make suggestions, partial access, full access, via notification, etc.
Desired Interface	Web GUI, admin interface, API, custom, etc.
Frequency of Interaction	Daily, weekly, ad hoc, etc.
Technical Expertise	Level of technical skills necessary to meet the needs of their Role.

Use this stakeholder map to identify and categorize relevant roles based on their participation in the taxonomy governance work. You'll see who to align with, to inform, or to empower and where communication efforts need improvement.



Actions (how the modeling evolves)

Every taxonomy changes over time.

Actions are specific tasks that help to evolve and to maintain a domain: creating terms, editing structures, approving changes, and more. Mapping these activities helps clarify the effort required and whether your current systems and roles are aligned to support them.

Use these prompts to evaluate each action.

- What is the action, and why is it needed?
- Which domains does it affect?
- How long does it take to complete?
- Who are all the roles that will participate in or approve the action?
- What systems are impacted by the action?
- Is this action dependent on another? Which one?

Action Catalog

Use this reference table to guide your evaluation of each action. We recommend creating your own spreadsheet or similar system to document this information in a consistent format.

Action Name	Add Term, Delete Term, Create Taxonomy, etc.
Action Descriptions	Describes the governance process and the desired outcome. This is not a description of the actual workflow.
Purpose	Describes the purpose of the action and the need to govern it. Provides context of the action and may directly reference business goals.
Taxonomy(ies) Involved	Taxonomy or taxonomies to which this governance action applies.
Roles Involved	List of roles involved (as defined in your Role Catalog) and their responsibilities related to the action.
Workflows Involved	List of workflows associated with the action. These are typically defined in other documentation.
Timeframe	3 days, 1 week, 6 months, etc.
Level of Effort	Low, High, etc.
Systems Impacted	Notes when system integrations are involved. This is useful when the needs of the system dictate the governance needs.
Notes / Assumptions	Additional information important to understanding relevance, need, justification, or desired outcome.

Training & Communication

Change management is hard, but it gets easier when people know what has changed, why it matters, and where to find the right information.

Strong training and communication practices reduce silos, build accountability, and create consistency across teams. They also lighten the load: when stakeholders trust the process and know where to go for answers, the overall effort required for governance drops.

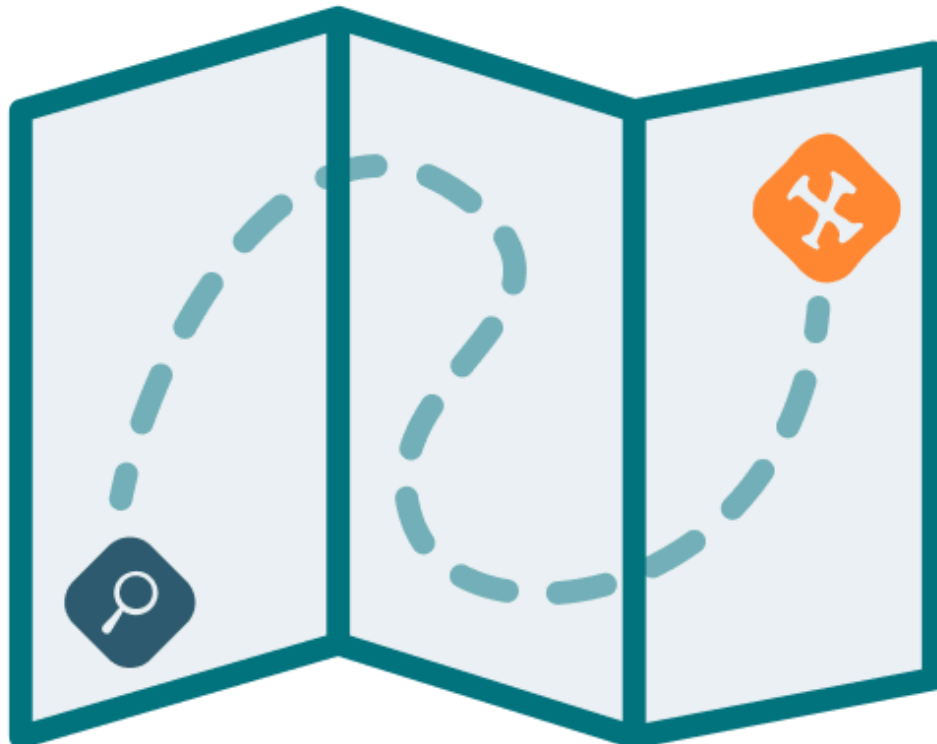
Any time your model changes, ask yourself what else needs to change as a result.

- **Who needs to know? Include immediate users, downstream teams, system owners, and leadership.**
- **What do they need to know? What applies to them?**
- **How will they be informed? Does any documentation need to be updated?**

Strategic Planning

You've evaluated where your organization stands. Now it's time to decide where to go next. A solid plan brings clarity, focus, and alignment, helping you prioritize what matters and gain momentum.

The following pages are designed to help you turn insight into action. Use what you've learned so far to set goals, define success, and outline a practical path toward greater information maturity and earn executive support.



Use this page to map out a high-level roadmap toward greater ¹ information maturity. Even if your plan changes later, capturing your current thinking helps align stakeholders and move forward with clarity.

Phase 1: Quick Wins (Next 30–60 Days)

What actions or improvements can you implement with minimal lift?

Focus areas:

-
-
-

Dependencies to resolve:

-
-

Phase 2: Medium-Term Initiatives (Next 3–6 Months)

What efforts will require some planning, resources, or change management?

Focus areas:

-
-
-

Risks or blockers:

-
-

Phase 1: Long-Term Vision (6+ Months)

What are your north star goals for taxonomy governance in your org?

Vision elements:

-
-
-

What must be true for this to happen:

-
-

Making Your Elevator Pitch

To get support for your work, speak the language of business impact. Not structure, not standards. Create a short pitch that explains why taxonomy governance matters to the organization, not just to taxonomists.

- 1 Start with the pain.** What business problems stem from poor taxonomy governance? Think inefficiency, missed insights, inconsistent user experience, etc.
- 2 Link to impact.** How does better governance solve those problems? Mention faster decisions or reduced risk.
- 3 Describe a simple solution.** What are you doing about it and why now? Focus on clarity, scalability, and alignment.
- 4 End with vision.** What's the bigger win?

Draft your 2-4 sentence pitch here. Imagine you're in an elevator with an exec who says " So, why do we need this again?"

Your Completed Workbook

You've done it! By completing the exercises and answering the questions in this workbook, you've taken a step toward greater information maturity and smarter data governance.

Most orgs don't start at the top of the maturity scale, and some never reach it. That's not the point. What actually matters is having the clarity and momentum to build a practical, prioritized roadmap that helps you move forward with confidence.

Your next step is to put your insights to work in your governance strategy.

Need backup? Check out the [Factor website](#) for additional resources or a link to book a consultation for help breaking down your data strategy and scaling it up.



What We Do

Who We Are ▾

Insights

Alignment Accelerator

SCHEDULE A CONSULTATION

Ready to Move Faster? Get Aligned First.

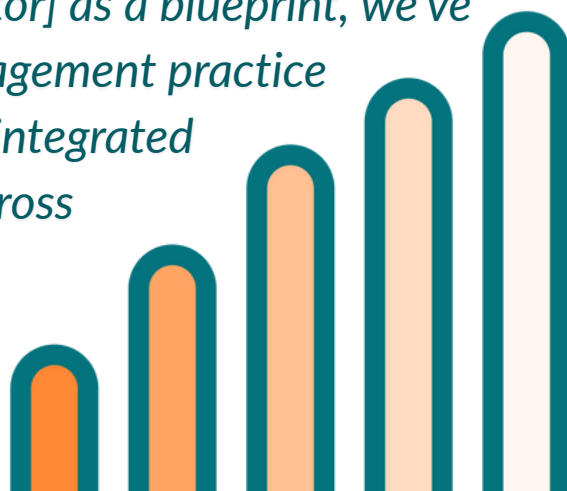
Even the best governance plans need support to succeed. Factor's **Alignment Accelerator** is a 30-day program designed to help large organizations build consensus and clear the path for action.

Through structured interviews, collaborative workshops, and a tailored strategy roadmap, the Accelerator provides the foundation you need to build and execute a sustainable taxonomy or data governance strategy.

[Read more](#) about the Alignment Accelerator, or [reach out to our team!](#)

"Using [Factor's Alignment Accelerator] as a blueprint, we've grown our taxonomy and data management practice with our business stakeholders and integrated it into the systems and processes across our enterprise."

—Fortune 50 Company





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