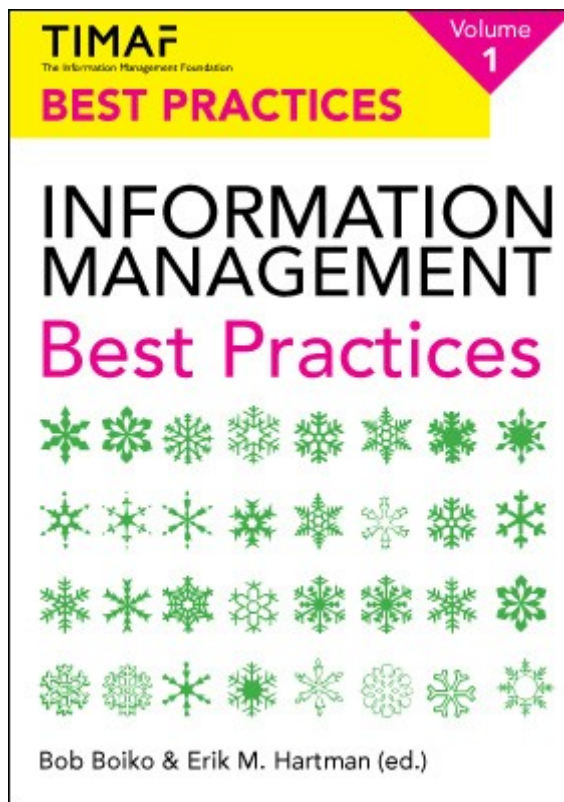


# Information Management Best Practices

*Sneak Preview*



December 29, 2009

### About this Sneak Preview

With 'Information Management Best Practices - Volume 1' TIMAF presents a yearly book of practical advice from dozens of information management experts across the globe. The first edition, to be released September 2010, will present step-by-step best practices from these and other organizations:

- Getronics (NL)
- Canadian Department of National Defense (CAN)
- Dublin Core Metadata Initiative (USA)
- Essex County Council (UK)
- Harvard Business School (USA)
- Hewlett-Packard (USA)
- Microsoft (USA)
- Motorola (USA)
- University of Washington (USA)
- Wienerberger (AU)

To give you a preview of the first edition we present summaries of four best practices.

#### **TIMAF Best Practices Editorial Board**

Boston, MA (USA) December 29, 2009

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## Introduction

### Information? Manage!

Information is the term we use to stand for all the forms of preserved communication that organizations care to produce, store and distribute. Anything from sales figures in a database to a video on philosophy can be considered information. We define information management as the organized collection, storage and use of information for the benefit of an enterprise.

### Information Management? TIMAF!

The field of information management is currently fractured and incoherent. Each sub discipline (content, document, asset, records, data management to name just a few) has its own practitioners, applications and professional communities. We believe that behind the seeming differences between these 'managements' there is a deeper unity that will eventually define a strong clear foundation for all of them. TIMAF, the Information Management Foundation, provides this foundation.

### Best Start? Best Practice!

With 'Information Management - Best Practices' we provide a yearly compilation of high quality best practice guidance, written for and by experts in the Information Management field around the world. It will help professionals overcome their information management challenges. It brings complex models down to earth, with practical guidance on day-to-day problems and issues.

## Integrate Taxonomy and Content Management

By: Stephanie Lemieux, Seth Early, Charlie Gray

Context: Motorola Inc.

### Problem statement

In 2006, Motorola was beginning an ambitious web content management project. Over the years, responsibility for customer facing content had become distributed among multiple business units and geographic regions. Different groups created and managed web content as they saw fit, using disparate technologies and inconsistent structures. In some cases, tagging with metadata was non-existent. In other cases, terms to describe and label information were used inconsistently. Creating and updating content was a manual, costly and time consuming process. Add to this mix the complexity of multiple languages and regional variations and the result was an inconsistent, fragmented and often unacceptable customer experience.

### Solution statement

Motorola knew it needed to overhaul how content was organized, managed and presented to customers. Project stakeholders were brought into the process early on so that they would understand the eventual goal and share a vision for how content would be managed - including the need for consistent organizing principles. Motorola brought experienced taxonomy resources in to help guide the process and proceeded to create detailed functional requirements around how taxonomy terms would be leveraged from a technical perspective and from a user experience perspective.

The taxonomy was integrated with the content management system as well as the user experience design. Finally, the details of applying the taxonomy in tagging processes needed to be socialized with content creators and content managers. Motorola was successful in this endeavor and created a web site that supports



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thousands of products, hundreds of attributes in dozens of countries and languages.

## Steps

- Step 1: Educate Stakeholders on Taxonomy
- Step 2: Bring a Taxonomy Expert onto your CMS Implementation Team
- Step 3: Determine Functional Requirements
- Step 4: Harmonize Requirements with Front-End Design
- Step 5: Figure Out Where you Want to Use Taxonomy: Create an Integration Plan
- Step 6: Integrate Taxonomy into the Content Model
- Step 7: Decide on a Technical Approach to Taxonomy: Native CMS Function, Customization, or Externally Managed Taxonomy
- Step 8: Use Collaborative Methods to Develop Taxonomy-Powered Functionality
- Step 9: Select Appropriate Tagging Mechanisms to Make Taxonomy Easy to Use
- Step 10: (Re)Educate Users

## Conclusion

Integrating a taxonomy with a CMS isn't always easy. One thing is clear from our experience at Motorola: the best thing you can do to help smooth the path of taxonomy integration is to continuously educate stakeholders. Encourage a dialogue between IT and taxonomy SMEs to ensure that they can understand each other in functional and technical discussions and eventually come to compromises that suit business and performance needs. Give content creators and editors a chance to understand the taxonomy structure and why tagging is so important. They will be your best allies in the future maintenance of the system you've worked so hard to build.

## Streamline Your Path to Metadata

By: Charlotte Robidoux, Stacey Swart

Context: Hewlett-Packard StorageWorks Division

### Problem statement

Using and reusing content from a single source assumes the ability to manage and access content. The capacity to control content efficiently requires a robust metadata strategy. Even so, developing a metadata strategy can be intimidating, onerous, and costly because of the sheer amount of time needed - time to research, evaluate, synthesize, implement, and maintain a viable metadata solution. The very scope of such work can prompt even the painstaking among us to abandon a strategic effort altogether.

For this reason, it is essential to find a streamlined approach to metadata, one that meets the needs of your organization. How, then, can groups streamline the development without cutting corners? How can teams simplify the process without undermining the very purpose of having a content management system (CMS)?

### Solution Statement

A gradual approach to establishing a metadata strategy—especially when considered in relation to your own context—makes the process more streamlined and manageable. The key is defining metadata components that are meaningful in your environment to help you reach your goals. Then you can determine the optimal configuration for your business and customize a taxonomy that will make content easier to find.

Thus a comprehensive metadata solution is both system-driven and directly managed by users who assign predefined values from controlled vocabularies. The solution also depends on input from all team members involved in content development, from content developers to editor and Administrators.

The Information Management Foundation [www.timaf.org](http://www.timaf.org)



*Charlotte Robidoux is a Content Strategy Manager at Hewlett-Packard Company (HP) and has over 17 years of experience in technical communication. At HP, she oversees the single sourcing strategy and implementation for the StorageWorks Division. Charlotte holds a Ph.D. from the Catholic University of America in rhetoric and technical communication.*



*Stacey Swart is the Content Management System Administrator and Strategist at StorageWorks Division of Hewlett-Packard Company (HP). She has over 16 years in the tech industry in areas ranging from technical support to technical communication, and is certified by HP as a Lean Sigma Green Belt. Stacey holds a B.S. from the University of Kansas in Education and English.*

## Steps

- Step 1: Define what metadata means to your organization and why it is important
- Step 2: Determine the goals that will drive your metadata strategy
- Step 3: Identify the metadata components that will help you obtain your goals
- Step 4: Identify metadata values
- Step 5: Determine what metadata components can be automated
- Step 6: Ensure that users will apply the metadata
- Step 7: Assign metadata tasks to roles
- Step 8: Prove that your strategy is sound

## Conclusion

Proving sound metadata in our case entailed extensive collaboration and testing among team members. Key areas of focus included checking and rechecking that our metadata values were entered into the tools correctly, ensuring high usability in the tools and in written processes so that team members could add metadata easily, configuring our tools to easily locate metadata and to indicate if values and elements were missing, and proving the concept that our metadata would enable us to locate content effectively for the purpose of reuse. The ultimate test of success is verifying that the implementation of metadata allows your organization to achieve the goals you identified at the outset.

## Coordinate Enterprise Information Management Investments

By: Joe Gollner

**Context:** Based on projects done for The Continuous Acquisition and Lifecycle Support (CALs) Office, an initiative associated with the Directorate of Engineering and Maintenance Planning and Standardization (DEMPS) at the Canadian Department of National Defence (DND).

### Problem statement

The core challenge to be overcome was finding a way to establish and apply a strategy for overcoming the inherent individualism, often bordering on isolationism, that afflicts organizational units, professional disciplines and equipment programs, in order to realize a coordinated approach to how information is created, managed, exchanged and used. Only in a coordinated effort could the massive inefficiencies in the DND documentation process be solved and if this problem could indeed be solved, significant operational benefits could be realized. A truly effective solution would correct the inefficiencies in information handling across the department and do so without falling into the trap of pursuing a one-size-fits-all technology solution that had already been proven, twice, to be impractical.

### Solution Statement

While establishing a core interdisciplinary team with a robust mandate and predictable funding served as an indispensable prerequisite, the key ingredient of success lay in the combination of an extensible information management standard with a proactive approach to engaging stakeholder groups in the evolution, as well as application, of that standard. The solution thus featured equal measures of a sound technical approach and a measured management strategy. At the end of the day, it was the flexibility that lay at the heart of both sides of this solution that resulted in what success was realized. The ability to be flexible made it possible to side-step



*Joe Gollner has been a longstanding advocate of, and practitioner with, open markup standards for over 20 years. He has participated in dozens of content management initiatives in such varied capacities as project manager, solution architect, educator, business strategist and sponsoring entrepreneur.*



the technical hurdles that had undone previous attempts and, at the management level, to engage such a diverse range of stakeholders amid the invariable changes that beset modern organizations.

### Steps

- Step 1: Declare a Vision
- Step 2: Assemble a Core Team
- Step 3: Elaborate the Vision
- Step 4: Establish an Official Mandate
- Step 5: Establish a Supplier Network
- Step 6: Network with the Stakeholder Community
- Step 7: Frame a Concept of Operations
- Step 8: Establish Governing Standard
- Step 9: Engage Pathfinder Projects
- Step 10: Construct a Reference Implementation
- Step 11: Progressively Improve the Standard
- Step 12: Catalogue and Publicize the Benefits Achieved
- Step 13: Defend the Investment

### Conclusion

The magnitude of change in components and the enormous variety of component combinations creates a very complex documentation environment in the Canadian Department of National Defense. Previous teams tried and failed to sort out this complexity and create a comprehensive management system.

Our strong vision and sponsor gave us the chance to try again. Our outreach to the network of information suppliers and stakeholders gave us the input and support we needed to create a more appropriate system. Finally, our solid concept of operations and governance model gave us the authority we needed to implement successfully.

## Creation of a Sustainable Data Management Governance Process

By: Bill Yock

Context: University of Washington



### Problem statement

The University of Washington (UW) consists of a large number of extremely complex information systems. It includes not only large administrative ERP business systems (Finance, HR, Payroll, etc.) but also a wide spectrum of highly regulated and educational specific systems (Research Administration, Student Information Systems, Housing and Food Services, etc.) The 'Institutional Data' within these systems is a strategic asset of the University and the appropriate governance for management and use of the data is critical to the operations of the University. Inappropriate governance can result in serious inefficiencies and risk exposures.

*Bill Yock is an Associate Vice Provost in the Office of Information Management at the University of Washington. He leads the Enterprise Information Services division. Bill is a member of the UW Data Management Committee and the Privacy Assurance and Systems Security council.*

### Solution statement

To deal with these complex issues the UW has created a 'constitutional democracy' approach to governance. A policy document serves as the base 'constitution' setting forth principles, definitions and responsibilities. Guidance documents serve as 'amendments' to the constitution which helps authorities to interpret issues and make decisions.

The 'democracy' works with Data Custodians, Data Trustees and a Data Management Committee, which serves as the 'legislative' branch helping to write new laws and lobby for change in existing practices. The numerous information management personnel across the university can be thought of as the 'executive' branch responsible for implementing the laws and monitoring data management best practices. Together all of these are working in a more cohesive and streamlined fashion than ever before. This approach has proven to be repeatable and sustainable.

## Steps

- Step 1: Foment Revolution
- Step 2: Establish a Constitution
- Step 3: Set up the Government
- Step 4: Engage in the Citizenry
- Step 5: Institutionalize the New Form of Government

## Conclusion

One of the greatest benefits of the Data Management Committee and the data governance policies and procedures being put in place is that general 'citizens' now have an official place to go to present their unique data management challenges and ask for help. By having a policy document that serves as a constitution, the rule of law for data management is clearly defined. People in the past raised issues but since there was no common ground or baseline of agreed upon rules the issues were never resolved or acted upon inconsistently.

Disagreements would tend to bounce around from group to group with nobody feeling empowered to act or make a decision. Now that accountabilities are clear and the procedures well defined there is increased efficiency and consistency in dealing with the many challenges.

As with any democracy the problems that arise in the future will require that previous policies be reformed. Having a checks and balances approach to separating judicial, legislative and executive powers is a wise architecture that the founders of the United States put in place. The data management governance structures put into place at the UW have followed a similar model and are proving prudent in maintaining the appropriate balance while also allowing the democracy to flourish.

## Send in a Best Practice

Have you experienced the merits of a specific approach to information management strategy, methodology, technology or tools? If so, here is an opportunity to share your knowledge with a global audience in 'Information Management Best Practices'.

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We will accept proposals on an ongoing basis. Please email your proposal to [info@timaf.org](mailto:info@timaf.org).

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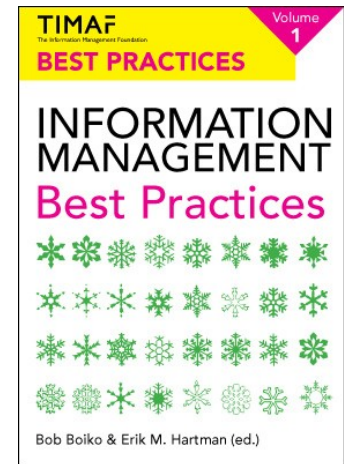
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