

PLAN TEST REFINEMENT

1. PLANNING



What is the taxonomy supposed to achieve?

2. CONTENT WARRANT



What can existing content and organisation systems tell us about vocabularies in use?

3. USER WARRANT

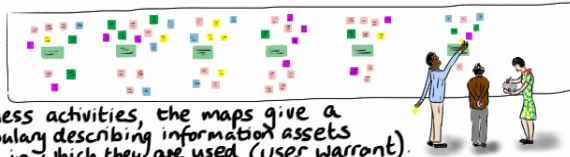


Who are the main users and what are the typical information tasks they perform?

SMEs can be useful to understand specialist user needs.

Warrant research can be conducted through a **KNOWLEDGE AUDIT**

A **KNOWLEDGE AUDIT** is a very good way of collecting content and user warrant. It produces knowledge maps documenting how knowledge and information assets support key business activities. If organised around business activities, the maps give a comprehensive overview of the vocabulary describing information assets (content warrant) and the contexts in which they are used (user warrant).



Produces usage scenarios for

4. FACET ANALYSIS & DRAFTING



What facets are required to represent the different user needs?

5. CARD SORTING EXERCISES



OPEN CARD SORTING is where users sort topics or sample content into clusters and give category labels to the clusters. It reveals common ways of thinking about content. Use if your content warrant is not very strong.

CLOSED CARD SORTING is where users sort topics into your draft taxonomy structure. Use if you have ambiguities or disagreements about how things should be organised, to find the most common interpretations.

6. SCENARIO TESTING



Card sorting and scenario testing are "active testing" techniques,

designed to give a comprehensive test of the taxonomy.

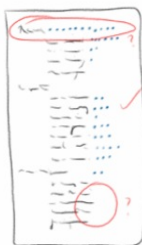
In taxonomy revision, the same scenarios can help you measure improvements in speed, ease and completion of common tasks.

7. PASSIVE TESTING



"Passive testing" is where the taxonomy is tested in real tasks in the field - or pilots.

8. BALANCE/LOAD TESTING



improvements

For taxonomies that have been deployed for a while, how is content being tagged across the taxonomy?

Empty spaces or overcrowded areas suggest improvements can be made.

9. ISSUE RESOLUTION



Feedback and issues from testing are resolved with help from **SMEs** on technical areas and feed directly into a refined taxonomy.

Issue logs are important tools for keeping track of changes and communicating with stakeholders.

10. FINALISATION



Once you have finalised your taxonomy, it's time to put your **TAXONOMY GOVERNANCE** in place. This should include a policy, process and roles for regular updates to the taxonomy.

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How to Build a Taxonomy