Information Architecture Workshop

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Management Consulting

Objective

Enterprise Content Management (ECM)
Goals and Objectives

• What is Information Architecture?
• What benefits does good IA bring?
• Who should own IA?
• How do we make progress on IA?
• Next steps
The Big Picture

• Application inventory – what applications do we have, of what kinds, owned by whom, used by whom?

• Data map – what kind of data do we have, stored/managed where, owned by whom, used by whom?

• Information architecture – how should we organize our content to make it findable and manageable?

• Master data management – how do we ensure that our data is consistent and accurate across all platforms?
The Big Picture

Metadata
What fields should we have?

Controlled Vocabulary
What field values should we have?

Master Data Management
How will we ensure quality values for fields?
Information Architecture Defined

Information Architecture (IA) is the art and science of organizing information to help people effectively fulfill their information needs.

Peter Morville and Louis Rosenfeld defined the three circles of information architecture as users, content, and context.

The Information Architecture Glossary (http://argus-acia.com/white_papers/ia_glossary.pdf)
Information Architecture Outputs

1. Metadata
   - Global set
   - Local set(s)

2. Controlled vocabulary for metadata fields
   - Doc type
   - Business process
   - Organizational location
   - Physical location
   - Compliance (RM, infosec, privacy)

3. Plan for implementing the above in content repositories
Information Architecture Methodology

Processes
What is the work we do at our organization?

Documents
What documents are part of the work we do?

Users
What are the keywords needed to find documents that are part of the work we do?

Systems
How can we implement the IA in the repositories that store the documents that are part of the work we do?
Benefits of Good IA

- Findability
- Manageability
- Compliance
- Extensibility/scalability
Who Should Own IA?

• No obvious owner, no “right” answer

• Academic answer: Chief Data Officer (or equivalent)
  • Few firms have one (yet—GDPR, NY, CA, and MA privacy laws and impending federal cyber standard will change this in the next 12 months)
  • Role focused narrowly on compliance and, typically, structured data

• Practical answer: whoever can get stuff done
  • Single biggest reason for IA failure is “analysis paralysis” – formally perfect, overly complicated designs that never get implemented
  • Making progress ASAP is more important than finding the “right” long term owner
Making Progress on IA

1. What are the goals of doing IA?
2. What are the most significant pain points?
3. What are the quickest wins to address pain points?
Goldilocks Principle – Who Ate My Porridge?

“JUST RIGHT” APPROACH

Focused on making the most valuable content the most findable for the greatest number of end users

Do “just enough” to get system stood up, get paid, and get out of there

SYSTEM INTEGRATORS

Try to get it perfectly right for every single piece of content, irrespective of business value, stakeholder time commitment, or project timelines

LIBRARY SCIENCE APPROACHES

TIME AND EFFORT
Modular Approach

• Like good computer code, metadata should be **modular**

• **Global elements** – shared across the enterprise, insulated from frequent changes

• **Local elements** – can be tailored to individual business units, process areas, or work groups without breaking the overall framework
# Modular Approach – Global Metadata Categories

<table>
<thead>
<tr>
<th>Document Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Document Class</td>
</tr>
<tr>
<td>• Document Type</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Compliance Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Record series</td>
</tr>
<tr>
<td>• PCI, PII, PHI</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Document Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Org chart</td>
</tr>
<tr>
<td>• Physical</td>
</tr>
<tr>
<td>• Process</td>
</tr>
</tbody>
</table>
# Modular Approach – Local Metadata Categories

<table>
<thead>
<tr>
<th>Project</th>
<th>HR</th>
<th>Procurement</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Project number</td>
<td>• Employee number</td>
<td>• Vendor ID</td>
<td>• Functional location</td>
</tr>
<tr>
<td>• Project name</td>
<td></td>
<td>• Contract ID</td>
<td>• Equipment number</td>
</tr>
<tr>
<td>• Cost center</td>
<td></td>
<td>• PO number</td>
<td>• Work order ID</td>
</tr>
</tbody>
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Controlled Vocabulary – Don’t Boil the Ocean

• Typically, many of the global metadata fields should already have a controlled vocabulary defined

• **Record Series** – there’s normally a retention schedule in place

• **Department** – there’s normally a list of departments in use by an ERP system

• **Facility** – there’s normally a list of facilities in use by an ERP system

• **Security Classification** – there’s normally a 3 – 4 tier classification system in place (from public to top secret)
Next Steps

• Find IA stakeholders and begin the conversation about where you are today and where you need to go

• Assess IA pain points in these categories
  • Findability
  • Manageability
  • Compliance
  • Extensibility/scalability

• Identify IA quick fixes and begin to address
Next Steps

Request follow up materials

Schedule complimentary call or on-site visit

Request peer connections

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