

Information Architecture Workshop

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Management Consulting

Objective

Enterprise Content Management (ECM)

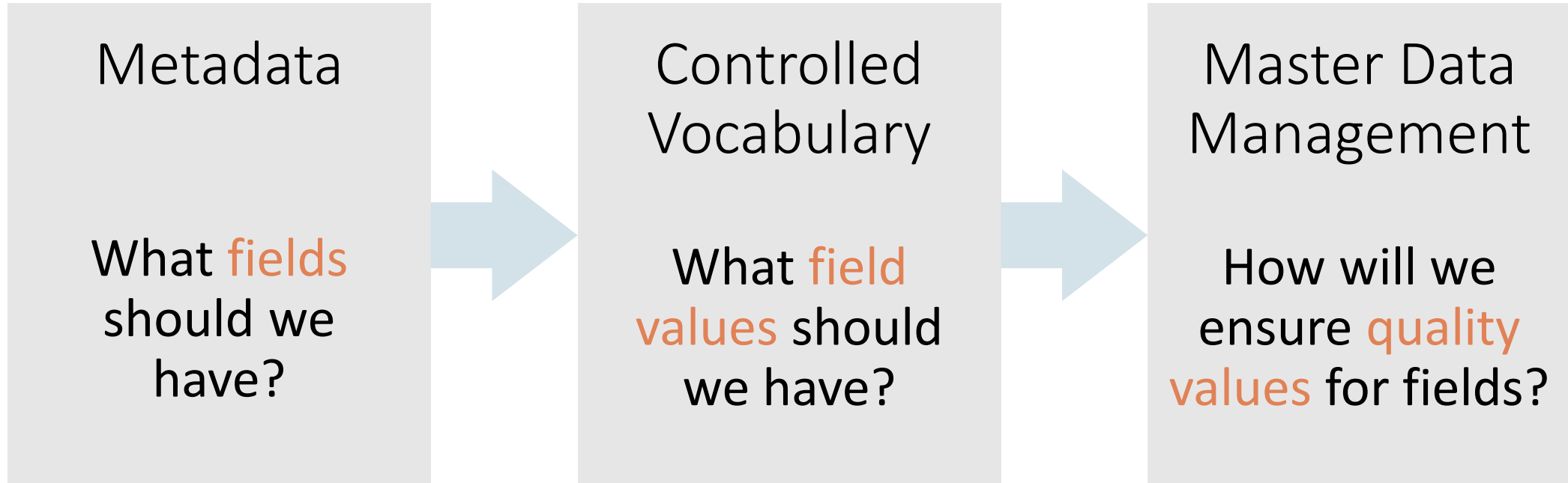
Goals and Objectives

- 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

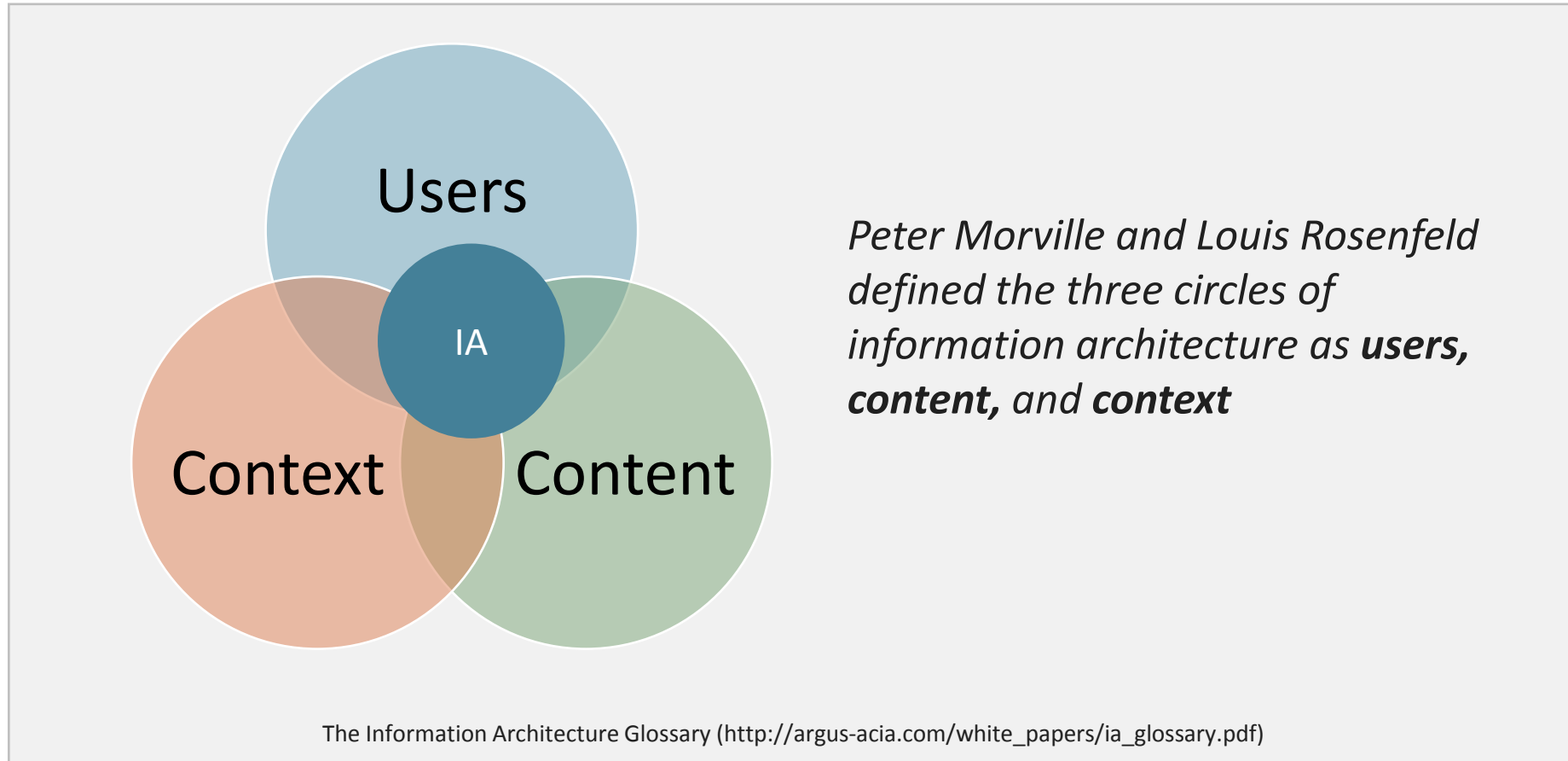
- Application inventory – what applications do we have, of what kinds, owned by whom, used by whom?
- Data map – what kind of data do we have, stored/managed where, owned by whom, used by whom?
- Information architecture – how should we organize our content to make it findable and manageable?
- Master data management – how do we ensure that our data is consistent and accurate across all platforms?

The Big Picture



Information Architecture Defined

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



Information Architecture Outputs

1. Metadata

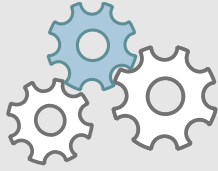
- Global set
- Local set(s)

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

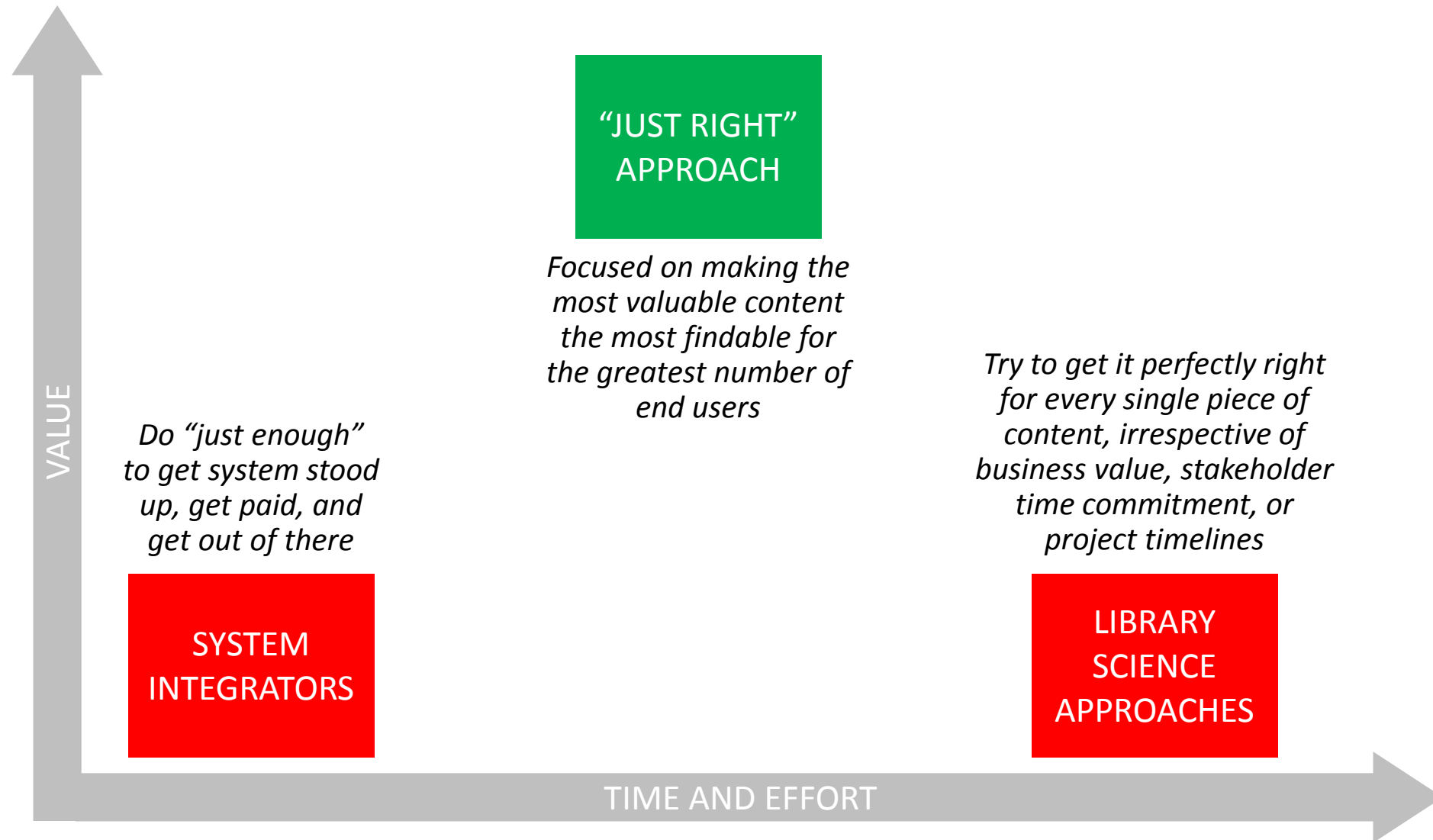
Who Should Own IA?

- 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?



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

Document Information

- Document Class
- Document Type

Compliance Information

- Record series
- PCI, PII, PHI

Document Location

- Org chart
 - Physical
 - Process
-

Modular Approach – Local Metadata Categories

Project

- Project number
- Project name
- Cost center

HR

- Employee number

Procurement

- Vendor ID
- Contract ID
- PO number

Operations

- Functional location
- Equipment number
- Work order ID

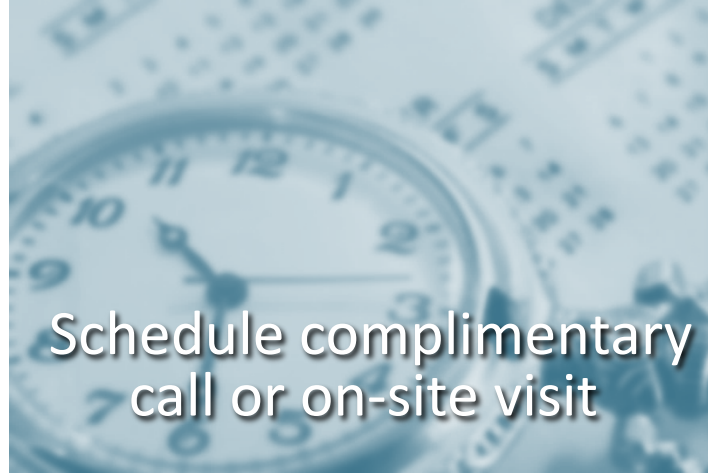
Controlled Vocabulary – Don't Boil the Ocean

- 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



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Thank You

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