Key Pointe
USABILITY CONSULTING
USER EXPERIENCE AND INFORMATION ARCHITECTURE

T 604.563.6317
W www.keypointe.ca
E tputkey@keypointe.ca

Best Practices for Building a Website Taxonomy

While each taxonomy project has its own quirks, there is a basic methodology we can use for planning, building, and maintaining a taxonomy.

Investigate Problems

When I start a taxonomy project, it's usually because there are problems with a website. Sometimes there's an existing taxonomy that's not working or not being used. Other times there's no taxonomy and the web team doesn't understand how a taxonomy can be used on a website. It's important to investigate these problems by interviewing the project team and stakeholders, then articulate these problems *without solving them.*

By staying away from solving problems during this discovery phase, we remain open to all comments and not just the ones that conform to what we want to hear.

Consider the Taxonomy Use

What is the taxonomy for? Is it for a website? An enterprise application? Who will be using it? What do they need to do with it? Does the taxonomy need to support search? Does the taxonomy need to support filtering or dynamic content display? Considering the taxonomy uses will help you build out the right kind of taxonomy.

Write Down Your Goals

As with any good project, you need to know why you're creating something, how you're going to do it, and what the end result should be. With every taxonomy project, I create a taxonomy plan which outlines such things as: the problems heard in the investigation or discovery phase, the solutions to those problems, the potential facets in the taxonomy, and any barriers to developing the taxonomy.

Build in a Phased Approach

I once had a potential client tell me they had 300 websites they wanted to combine into one website and wanted a taxonomy that accommodated all these websites. They asked me what my

approach would be and I said, "I would recommend doing this in a phased approach. Instead of doing all 300 at once, consider starting with a few big ones..."

When you're building a taxonomy from scratch, you need to start somewhere. While there are tools that can help with terms and term extraction, a taxonomist still needs to have a good understanding of the content, be able to interview subject matter experts, and create a first version of a taxonomy. If someone tries to consider all 300 websites at once, there could be too many moving parts, too many experts to interview, and the process to get to the first iteration of the taxonomy will take a really long time.

That said, the phase approach should be planned in a way that suits the project needs and goals.

Look for Existing Resources

When starting a taxonomy project, there are invariably lists of keywords, search analytics, or user testing results that are useful to inform a taxonomy. Look for these resources to help build out a taxonomy.

Review with Subject Matter Experts

Subject matter experts should be included when building out a taxonomy. As I tell clients, as the taxonomist, I bring the skill of knowing how to organize a taxonomy. The subject matter expert brings the skill of knowing the domain. Together we combine our knowledge to create a great taxonomy.

Use SEO to Inform Taxonomy

SEO is a great friend to taxonomy. SEO focuses on keywords and the things that users search for on a Google or a website. The taxonomy terms don't necessarily need to conform to the SEO terms, but the SEO terms should be included in some way in the taxonomy. You can read more in this blog post: [Use Taxonomy and Information Architecture to Improve SEO](.).

Educate Others

On some taxonomy projects, taxonomy is an unknown term. People aren't aware of how a website CMS can use taxonomy so it's important to teach people how taxonomy can be used. It is particularly important to teach web designers and programmers. It's important to remember that starting to use taxonomy is a change that requires an understanding of change management.

A few months ago I attend a presentation where I learned that people have to hear something 7 times before it sinks in. This holds true for taxonomy: on a recent project, I reiterated how taxonomy is used about 7 times before one person on the team finally understood taxonomy and said, "This taxonomy thing is a big deal."

Create Your First Version and Use Governance for Iterations

Eventually you'll come to your first version of the taxonomy. But it doesn't stop there! Taxonomies are living things that need to be revised as content is added or removed. You'll need governance for your taxonomy that includes a taxonomist, subject matter experts, and

programmers. For example, if you want to add a term, the subject matter expert needs to review it to ensure it's an actual *thing*. If you want to use it somewhere on a website, you may need the help of a programmer to determine how the change will be made on the website.

More Resources

There's a lot of information out there about taxonomy best practices. You can learn more with these links:

[7 Taxonomy Best Practices](#)

[Taxonomy Design Best Practices](#)

[7 Best Practices for Implementing Taxonomy](#)