

PARSONS | TKO

Welcome

- All participants' microphones have been muted & cameras have been turned off
- Please post any questions in the chat & we will review them during our Q&A segment
- This webinar is being recorded & will be distributed after the session

Who is speaking?




Adam Good

Senior
Strategist,
ParsonsTKO

How to build and use a taxonomy

December 15, 2021

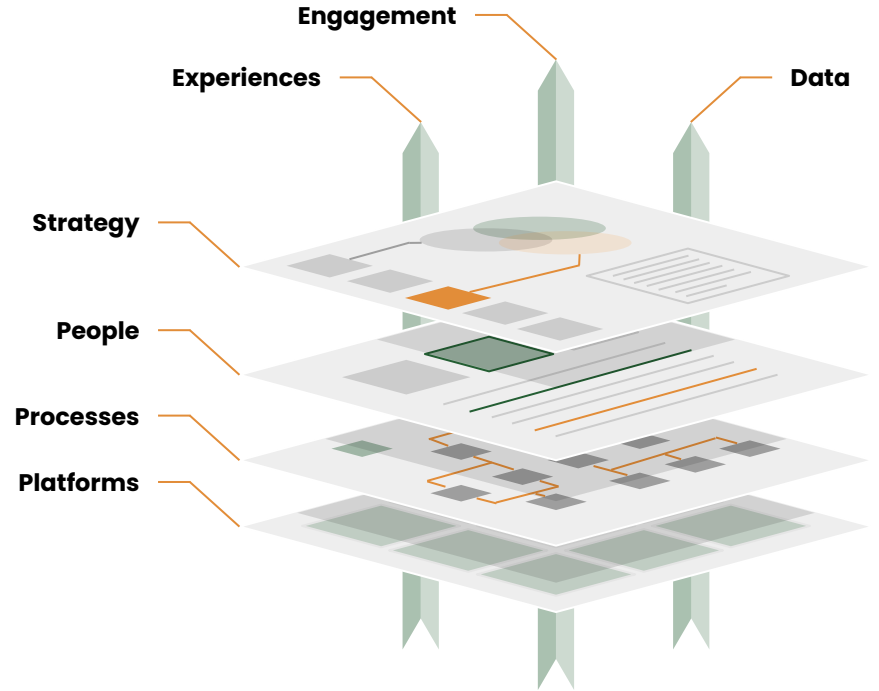
Today's Agenda:

- Goals for today's workshop (5 min)
 - Taxonomy: What's in a name? (25 min)
 - Taxonomy in action (20 min)
 - Next steps (5 min)
- 

The way we see possibilities

Engagement Architecture ♦ noun

The ParsonsTKO philosophy and methodology that addresses your outreach platform as a holistic ecosystem—an interconnected set of people and systems that work together to advance your mission.



P|TKO

Goals for today's workshop



What we hope to achieve today



Today we will:

- Provide clarity on **what taxonomy is** and does
- Understand **how taxonomies are used today** within and across external channels – and internally
- Determine what opportunities exist for **evolving taxonomy usage**
- Prepare you to talk with your peers about the **types of taxonomy terms** to consider for your engagement platforms

P|TKO

Taxonomy: What's in a name?



What is taxonomy?

A classification system

for **content, projects, audiences, and data**

that empower **strategic use**

within and *across* the **channels and systems**

of your organization's **engagement architecture**

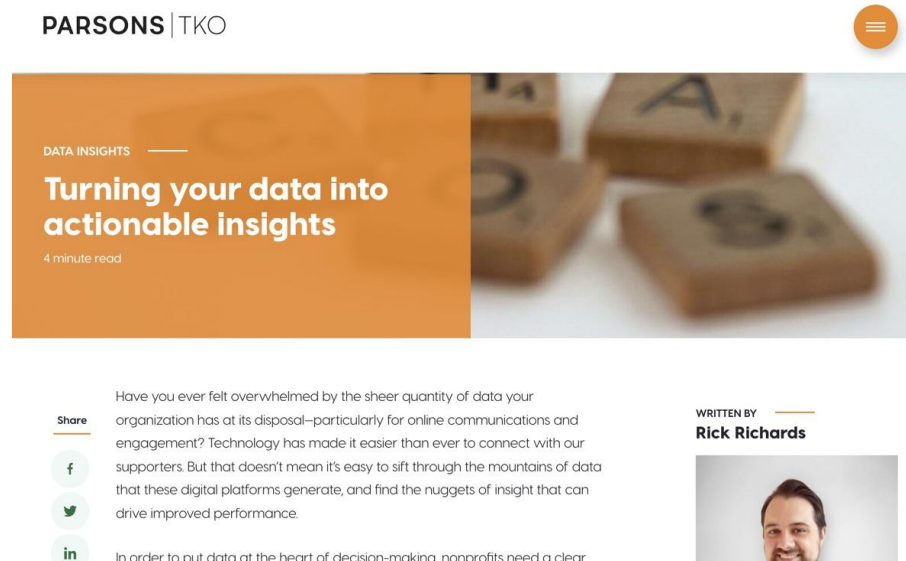
Taxonomy (Data)	Relevant Channel(s)	Example Asset(s)	Strategic Use
Topics	Website, CRM, Email, Advocacy	Reports Posts Experts	<ul style="list-style-type: none"> • Enforce content strategy • Support related content consumption • Inform calls to action
Staff	CRM, Website	Contacts, Reports, News, Press Releases	<ul style="list-style-type: none"> • Manage coverage of issues by internal staff members • Identify gaps in high-value connection coverage • Easily manage points of contact for issues or topic focused website content
Audience Type	Email, CRM	Contacts Campaigns Automations	<ul style="list-style-type: none"> • Analyze audience-specific interaction patterns • Create personalized automations
Engagement Level	Advocacy Platform, CRM, Website	Contacts, Website Content	<ul style="list-style-type: none"> • Assess engagement of individuals and groups • Identify content appropriate for contacts at different engagement levels • Create dynamic lists targeting contacts at particular engagement levels

How are taxonomies used on your website?

As you think about your audience engagement platforms, start to identify key **content types** (assets), **taxonomies** (categories), and individual **taxonomy terms** to apply to content within the CMS

For example, in this sample blog post one taxonomy & term that might be applied:

- Channel = Website
- Content Type = Blog Post
- **Taxonomy** = Topics
- Taxonomy **Term** = Data
- Author = Rick Richards



The screenshot shows a blog post header for 'PARSONS | TKO'. The title is 'Turning your data into actionable insights' with a '4 minute read' indicator. The main text begins with 'Have you ever felt overwhelmed by the sheer quantity of data your organization has at its disposal...'. The author is identified as 'Rick Richards'. Social sharing icons for Facebook, Twitter, and LinkedIn are visible on the left.

Why are taxonomies useful?

For audiences

- Easily find content of interest, and related content
- Filter/search content
- Understand what topics are important to your organization
- Learn how you organize content
- Discover useful and relevant content in Google searches

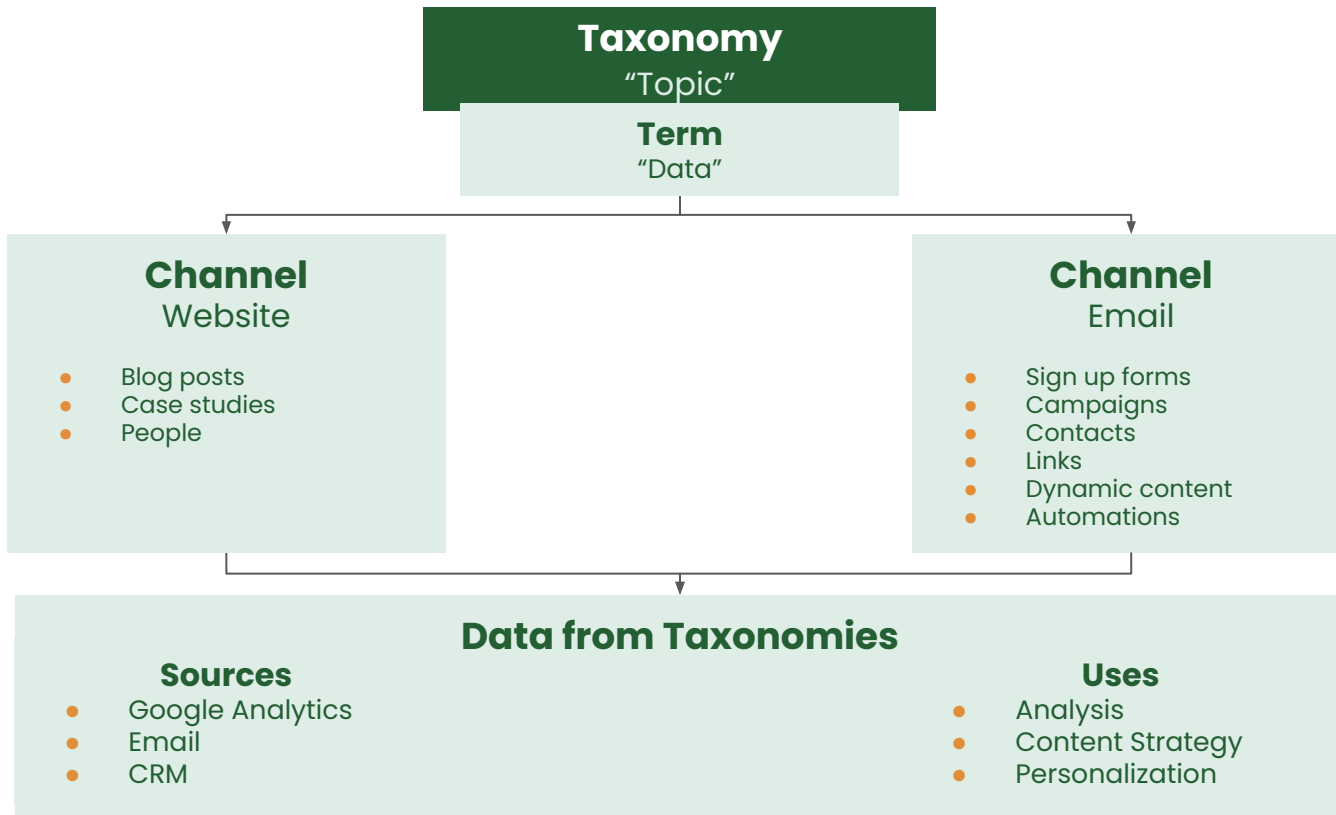
For your reporting

- Learn where and to whom to effectively deliver content marketing
- Inform “personalized” content
- Understand which existing content is most valuable
- Make decisions on what content to create, sunset, and focus on

For your operations

- Develop a common language for describing projects and portfolios
- Easily identify project considerations, such as connected systems and content, audiences served, internal users impacted

Taxonomy isn't just for the website



Where can taxonomy evolve over time?



1. Deepen use of taxonomies **within channels**
2. **Gather new data** with taxonomies to inform strategy and assess tactics
3. **Standardize** and **connect** taxonomies **across channels** to understand and **improve multi-channel engagement**

Where are your taxonomies kept?

Taxonomies are...

- Categories
- Groups
- Labels
- Tags
- Metadata
- Segments
- Context
- Lists
- ?



Taxonomies are often **hidden in plain sight**.
Think about the ways you use or categorize...

Website IA, **menus**, or navigation

Hashtags on social media

Emails into **folders**

Your **contacts** into related groups, lists, segments

Project names across teams

Marketing **campaigns**

Titles or categories of **internal reports**

P|TKO

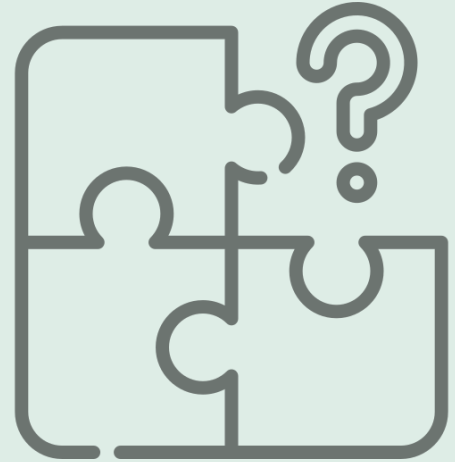
Taxonomy in action



Building a taxonomy

Asking questions can “pressure test” categories for clarity of usage. Let’s dive deeper into the categories we’ve identified by asking

- How will you know whether something fits?
 - What makes this category unique?
 - What is similar about this/other categories?
 - Why are the distinctions important to users? reporting? Operations?
- Who should own/manage this taxonomy?
- Where should it be used (what systems, channels, etc)?
- How easy or complex will it be to change this taxonomy?



Taxonomies have multiple uses...

Audiences

Think about...

- What search terms might they use?
- What kinds of content are they looking for?
- How will a user know if a piece of content is of interest to them?
- What connects related pieces of content?

Reporting

Think about...

- How do you target content to the right audience?
- What conversions are relevant for a piece of content?
- What breakdowns of data/reports are most relevant to you?

Content Operations

Think about...

- How do you group content together in campaigns?
- What is the trigger to create new content?
- How do you know it's time to refresh or retire content?
- Who in the organization is responsible?

Identifying taxonomies

Can we have a volunteer whose website we could look at?

Step 1: Let's open the site and explore some pages. (It's often good to start with a content page such as a report or blog post)

Step 2: Jot down ideas for terms or brief phrases you might use to categorize this post.

Create a [copy of this spreadsheet](#) and enter your ideas in the first column.



- What might a user be looking for?
- What other content is related to this post? What connects that content?
- Which departments, panels, or staff are related to this post?
- What information is important behind the scenes for marketing this content?

Taxonomy inventory

Today:
discover taxonomies

Moving forward:
Document audiences,
uses, considerations,
and governance

PARSONS | TKO Taxonomy Inventory

This worksheet reflects capture of **current taxonomies** used at [our organization]; the existing websites taxonomy, "informal" taxonomies used throughout the organization, as well as other categories of content that we have identified. This worksheet should be used for reference purposes only, as a jumping off point to create a new taxonomy for your website and organization.

Potential Taxonomy	Example Terms	Likely Audience Using this Taxonomy Today		Purpose/Relevance of Taxonomy		
		Primary	Secondary	Audiences	Internal reporting/ ops	Considerations for using, adding or evolving this taxonomy
Topics / Issues				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Regions				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Policy & Advocacy						
Organizational Designations				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Members				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CMS-Specific Taxonomies				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
				<input type="checkbox"/>	<input checked="" type="checkbox"/>	

+ Taxonomy Categories ▾

Considerations

- (How) are these taxonomies in use today?
- What makes them relevant?
- Are any taxonomies missing?

Taxonomies should evolve over time.

Involve others in your org in the continual process.

Share what you've discovered today with your peers.

- Which categories you think are most critical?
- Which are most relevant to you in your role? To your organization? To your audiences?
- Which do you have the power to change?





Any questions?

P|TKO

**Would you like to continue
the conversation?**

 [linkedin.com/in/asgood/](https://www.linkedin.com/in/asgood/)

 [linkedin.com/company/parsonstko/](https://www.linkedin.com/company/parsonstko/)

Join our community:

parsonstko.com/community

Want to dive in?

parsonstko.com/project

How did we do?

Please let us know by filling out our
[survey.](#)