taxonomy
BOOT CAMP »»»»

October 31– November 1, 2011
**Washington Marriott Wardman Park
Washington, DC**

Making Information Work

LEARN ABOUT:

- Managing and growing a taxonomy
- New tools on the market and where the market is headed
- Enhancing your information infrastructure with the right taxonomy
- Taxonomy design concepts and strategies
- Selecting the right metadata, taxonomy approach, and tools for your environment
- Evaluating auto-categorization schemes and tools
- Managing the build, buy, or automate decision
- Working collaboratively with your content and stakeholders
- Measuring and demonstrating the business impact and ROI
- Creating and implementing successful taxonomies
- Case studies, lessons learned, and best practices

KEYNOTE SPEAKERS

Don Turnbull
School of Information,
University of Texas

Jeremiah Owyang
Industry Analyst,
Altimeter Group

Whitney Tidmarsh Bouck
Box Enterprise

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taxonomy
BOOT CAMP >>>>>

October 31– November 1, 2011
Washington Marriott Wardman Park Washington, DC

Making Information Work

Making content discoverable is the job of a well-constructed, robust taxonomy — and a mission-critical objective for today's organizations. Designed, developed, implemented, and managed effectively, a taxonomy or categorization scheme ensures people are finding and using precise information in myriad internal data collections and websites.

Now in its 7th year, Taxonomy Boot Camp has proven to be an incredible opportunity to immerse yourself in 2 days of tightly integrated, interactive sessions with some of the leading practitioners and thought leaders in taxonomies. Sessions and speakers explore the state of taxonomies and the technologies involved and challenge you to consider how taxonomies and information organization approaches are evolving — and where you'll fit in that future. The program highlights case studies, practical and thought-engaging sessions on ontologies, folksonomies, taxonomies in SharePoint, lessons learned, metrics, demonstrating value, governance, and taxonomy management.

Taxonomy Boot Camp is packed with practical advice for taxonomy specialists about tools, products, and technology for categorization options, along with information about how to choose, develop, deploy, and maintain the right categorizer for specific business needs.

Enjoy the conference!

Welcome to Taxonomy Boot Camp

WELCOME RECEPTION
Monday, October 31 • 6:00 p.m. – 7:00 p.m.
Maryland Suite, Lobby Level

Enjoy drinks and hors d'oeuvres in a relaxed atmosphere as we kick off the start of this year's program. Open to all conference attendees, speakers, and sponsors.

KEYNOTES & CONTINENTAL BREAKFAST
The keynote each morning will take place in the Thurgood Marshall Ballroom located on the Mezzanine Level (escalators up from Registration Area.) A continental breakfast will be provided for conference attendees each morning before the keynote session from 8:00 a.m. – 9:00 a.m. Check your program for additional morning and afternoon break times and locations.

LUNCHEONS
Lunch on Monday and Tuesday will be served outside of the Thurgood Marshall Ballroom located on the Mezzanine Level.

ENTERPRISE SOLUTIONS SHOWCASE GRAND OPENING RECEPTION
Tuesday, November 1 • 5:00 p.m. – 7:00 p.m.

Celebrate the opening of the 2011 Enterprise Solutions Showcase with a networking reception on Tuesday evening. Enjoy drinks and hors d'oeuvres while visiting with our conference sponsors.

The Enterprise Solutions Showcase will feature the top companies in the KM, CM, search, taxonomy, and intranets marketplace, offering attendees an opportunity to explore all of the latest in product and service solutions.

CONFERENCE PRESENTATIONS
Many speakers have made copies of their slides available for download from the conference website (www.taxonomybootcamp.com).

Click on **"PRESENTATIONS"** and enter Username/Password: **DC2011.**

CONFERENCE CHAIRS

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MONDAY, OCTOBER 31, 2011 *All sessions are located on the Mezzanine Level.*

Time	
8:00 a.m. – 9:00 a.m.	**CONTINENTAL BREAKFAST**
9:00 a.m. – 10:00 a.m.	**WELCOME & KEYNOTE • New Directions in Taxonomy** • Don Turnbull • *Thurgood Marshall Ballroom*
10:00 a.m. – 10:15 a.m.	**Taxonomy Is Only the Beginning** • Gina Bulatovic • *Thurgood Marshall Ballroom*
10:15 a.m. – 10:30 a.m.	**COFFEE BREAK** • *Thurgood Marshall Ballroom*

Getting Started Track • *Thurgood Marshall Ballroom*
Beyond the Basics Track • *Madison Room*

Time	Getting Started Track	Time	Beyond the Basics Track
10:30 a.m. – 12:00 p.m.	**Deal the Cards! Successful Beginnings for Taxonomies** • Marjorie Hlava & Alice Redmond-Neal	10:30 a.m. – 10:50 a.m.	**Taxonomy Alignment: EU Publications Office** • Laurent Bégin
		10:50 a.m. – 11:10 a.m.	**Rebuilding Taxonomy Warehouse as an Ontology** • Dave Clarke
		11:10 a.m. – 11:30 a.m.	**Taxonomy Design for Open Source Digital Asset Management Systems** • Michael Lauruhn & Joseph Busch
		11:30 a.m. – 11:50 a.m.	**Bank for Int'l Settlements Document Mgmt Strategy Taxonomy** • Dorothea Jama-Auerswald & Joseph Busch

Time		
12:00 p.m. – 1:15 p.m.	**KEYNOTE LUNCHEON • Semantic Technology: Why?** • Jeremy Bentley • *Thurgood Marshall Ballroom*	
1:15 p.m. – 2:00 p.m.	**The Curious Lives of Full-Time Taxonomists** • Zach Wahl, Edee Edwards, Nikkia Anderson, & Farah Gheriss	**Taxonomies & Ontologies for Content Management and Search** • Dean Allemang & Anthony Rhem
2:00 p.m. – 2:30 p.m.	**Tips and Tricks From a Novice Taxonomy Specialist** • Sergio Orefice	**"Build vs. Buy" & Standards-Based Taxonomy Management** • Bob DuCharme
2:30 p.m. – 3:00 p.m.	**Embracing the Unexpected in Taxonomy Development** • Seth Maislin	**Hierarchies & Polyhierarchies: Is More Better?** • Sherry Chang & Heather Hedden
3:00 p.m. – 3:15 p.m.	**COFFEE BREAK** • *Thurgood Marshall Ballroom*	
3:15 p.m. – 3:45 p.m.	**How to Build a Corporate Taxonomy** • Gretta Chahine	**Avoiding the Autobiographical Taxonomy** • Gary Carlson
3:45 p.m. – 4:15 p.m.	**Successfully Advocating for Taxonomy in the Corporate World** • Fleur Levitz	**Enabling Social Media Through Metadata** • Christian Buckley
4:15 p.m. – 4:55 p.m.	**Semantic Ontologies in Your Enterprise** • Dave McComb	**Empirical Approaches to Taxonomy Development** • Patrick Lambe
5:00 p.m. – 5:45 p.m.	**Everyone Regroups for a Standards Update** • Marjorie Hlava • *Thurgood Marshall Ballroom*	
6:00 p.m. – 7:00 p.m.	**WELCOME RECEPTION** • *Maryland Suite, Lobby Level*	

TUESDAY, NOVEMBER 1, 2011

Time	
8:00 a.m. – 8:45 a.m.	**CONTINENTAL BREAKFAST** • *Thurgood Marshall Ballroom*
8:45 a.m. – 9:45 a.m.	**KEYNOTE • Architecting a Connected Enterprise** • Jeremiah Owyang • *Thurgood Marshall Ballroom*
9:45 a.m. – 10:00 a.m.	**KEYNOTE • KM Solutions in the Cloud** • Whitney Tidmarsh Bouck • *Thurgood Marshall Ballroom*
10:00 a.m. – 10:30 a.m.	**COFFEE BREAK** • *Thurgood Marshall Ballroom*

Information Architecture Track • *Wilson Room*

Time	
10:30 a.m. – 11:15 a.m.	**IA for Taxonomists: Seeing Your Ideas Through to Execution** • Seth Earley **Content in Information Architecture** • Mike Doane
11:30 a.m. – 12:15 p.m.	**Building Effective Information Architecture Strategy for SharePoint 2010** • Dave Coleman **16 Million Products on One Shopping Site** • Clint Elmore
12:15 p.m. – 1:15 p.m.	**ATTENDEE LUNCHEON** • *Thurgood Marshall Ballroom*

Taxonomy Tools Track • *Wilson Room*

Time	
1:15 p.m. – 2:00 p.m.	**Taxonomy Tools Requirements and Capabilities** • Joseph Busch & Zachary Wahl **Agile for Managing Taxonomy Projects** • Ahren Lehnert

Text Analytics Track • *Wilson Room*

Time	
2:15 p.m. – 3:00 p.m.	**Text Analytics in Practice** • Tom Reamy & Seth Grimes
3:00 p.m. – 3:15 p.m.	**COFFEE BREAK** • *Thurgood Marshall Ballroom*

SharePoint Track • *Wilson Room*

Time	
3:15 p.m. – 4:00 p.m.	**Looking Under the Hood: Metadata Strategy Impacts Everything You Do** • Christian Buckley **Leveraging Automatically Applied Metadata on a KM Platform to Deliver Permissions** • David Sanchez
4:15 p.m. – 5:00 p.m.	**Case Study: Microsoft's Experience with Modeling Term Sets in SharePoint 2010** • Gary Carlson & Pam Green **An Enterprisewide Taxonomy in SharePoint 2010** • Karin Michel
5:00 p.m. – 7:00 p.m.	**GRAND OPENING RECEPTION in the Enterprise Solutions Showcase**

KEYNOTES

MONDAY
9:00 a.m. – 10:00 a.m.

New Directions in Taxonomy
Don Turnbull, School of Information, University of Texas

TUESDAY
8:45 a.m. – 9:45 a.m.

Architecting a Connected Enterprise
Jeremiah Owyang, Industry Analyst, Altimeter Group

9:45 a.m. – 10:00 a.m.

KM Solutions in the Cloud
Whitney Tidmarsh Bouck, General Manager, Box Enterprise

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All attendees are automatically entered to play. Just do what you would normally do in the showcase—VISIT THE BOOTHS! When you visit each booth, get your badge scanned. Once you have been scanned by 15 different companies, you will be entered to win!

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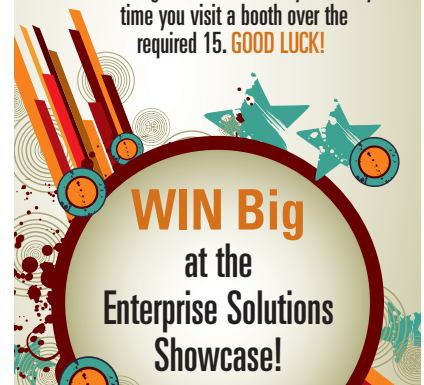
All sessions are located on the Mezzanine Level.

8:00 a.m. – 9:00 a.m.
CONTINENTAL BREAKFAST

WELCOME & KEYNOTE

9:00 a.m. – 10:00 a.m. • *Thurgood Marshall Ballroom*
New Directions in Taxonomy
Don Turnbull, School of Information, University of Texas

The growth of the semantic web and social applications based upon shared descriptions of content are bringing new directions for ontology and taxonomy building. The possibilities for personal taxonomies based upon user behavior and actions open up exciting vistas in the use of both formal and informal vocabularies, and may cause us to rethink our traditional approaches to designing taxonomies and ontologies. Turnbull explores this emerging world through examples of how organizations are taking advantage of these changes to meet their objectives.

10:00 a.m. – 10:15 a.m. • *Thurgood Marshall Ballroom*
Taxonomy Is Only the Beginning:
Five Growth Drivers You May Have Missed
Gina Bulatovic, Senior Solutions Architect, ByteManagers, Inc.

Gina highlights the five drivers often missed and upon which the ecommerce experience rely: data normalization, data population, search optimization, imaging/visual browse and dynamic content. With content properly modeled, data elements can be harmonized for the customer, whether the consumer or internal user.

10:15 a.m. – 10:30 a.m.
COFFEE BREAK

Getting Started Track• *Thurgood Marshall Ballroom*

10:30 a.m. – 12:00 p.m.
Deal the Cards! Successful Beginnings for Taxonomies
Marjorie Hlava, President &
Alice Redmond-Neal, Chief Taxonomist, Access Innovations, Inc.

This learn-by-doing session starts by building a solid conceptual foundation for taxonomy creation and reinforces concepts with audience participation. We establish the rules of the game by drawing on taxonomy standards for the key components of a thesaurus, and explore how those elements support information needs of users from multiple perspectives. Examining illustrative sites and behind-the-scenes solutions, you'll see a well constructed taxonomy with a rich interplay of terms and synonyms lead to better information access. Then we turn to developing a taxonomy that suits your needs and serves users, respecting their angles on specialized vocabularies. We'll jump into the game using a card sort activity for insight into how a subject area can be viewed, described, and structured. Join the learning and fun!

12:00 p.m. – 1:15 p.m. • *Thurgood Marshall Ballroom*
KEYNOTE LUNCHEON:
Semantic Technology: Why?
Jeremy Bentley, CEO, Smartlogic

Semantic systems are coming of age, and semantic technologies are being adopted and put to work. But what type of problems are they good at solving? Using case studies from government and enterprise deployments, Jeremy Bentley shares practical lessons learned on how semantic systems are applied to information that is both behind the corporate firewall as well as on the web. He discusses how the benefits of adding semantics to an organization's existing investment in search and content management are impressive, illustrates the impact of semantic technology on an organization's information architecture, and looks at the difference between semantic projects for the enterprise and the goal of Web 3.0 (aka the semantic web), the likely path of convergence, as well as the deliverables and value that each step should provide. Bentley concludes with some do's and don'ts of semantic projects as well as the role of the information professional in such a project.

1:15 p.m. – 2:00 p.m.
The Curious Lives of Full-Time Taxonomists
Zach Wahl, Director, Information Management, Project Performance Corp.
Edee Edwards, Corporate Taxonomy Manager, PAREXEL
Farah Gheriss, Leader, Information Organization and Access Group, International Monetary Fund
Nikkia Anderson, Senior Information Specialist, Information International Associates, Inc.

This candid look at three different professional lives builds on a tradition of taking an in-depth first-person dive into the responsibilities, challenges, and opportunities for people who work as full-time taxonomists within large organizations. What are the different challenges they face selling the value of taxonomy? What issues surround software and vendor selection, and how much input do vendors have? This panel talks about how they got their start within their organization, a "typical" work week, and gives examples of recent projects and initiatives. They engage the audience in the discussion and face the perceptions and misconceptions we have about practicing taxonomists.

2:00 p.m. – 2:30 p.m.
Tips and Tricks From a Novice Taxonomy Specialist
Sergio Orefice, Taxonomy Specialist, PricewaterhouseCoopers

For an individual who is new to the world of librarianship, "taxonomy" can be a daunting field to understand. These fears can be conquered with a little preparation and a lot of patience. This session provides a list of tips and recounts some of the obstacles encountered during the speaker's transition from the PwC Finance department to Vocabulary Management. Sergio Orefice shares some experiences that have made him a better taxonomy specialist, including understanding what the taxonomy world in a corporate setting is really like, to courses an individual should take to prepare for the task ahead — all the tips and tricks he wished he'd had before becoming a taxonomy specialist.

2:30 p.m. – 3:00 p.m.
Embracing the Unexpected in Taxonomy Development
Seth Maislin, Senior Consulting Taxonomist, Earley & Associates

Surprise is the best validation. Taxonomy developers can't know what they don't know, and all taxonomies and taxonomy applications are unique in some way, with their own nuances and custom contexts. It's important for taxonomists to uncover these details quickly, and this means the unanticipated is business as usual. Besides, surprise is far more useful than general agreement among stakeholders, which often suffers from siloed thinking and political motivations. Seth Maislin shares several real-life, on-the-job surprises (and a few laughs), along with suggestions on how to find surprises of your own.

3:00 p.m. – 3:15 p.m.
COFFEE BREAK

3:15 p.m. – 3:45 p.m.
How to Build a Corporate Taxonomy
Gretta Chahine, Taxonomist & Search team leader, Caterpillar

Taxonomy is a fundamental part of any information architecture. Any organization which needs to make significant volumes of information available in an efficient and consistent way to its customers, partners, or employees needs to understand the value of a serious approach to taxonomy design and management. This session focuses on the process and techniques to develop an enterprisewide taxonomy strategy, organize your data, and improve your search relevancy.

3:45 p.m. – 4:15 p.m.
Successfully Advocating for
Taxonomy in the Corporate World
Fleur Levitz, Vice President–Taxonomist, Morgan Stanley

As the word "taxonomy" is becoming more recognized and widespread, there is still a lot of confusion and misinformation about the benefits of a taxonomic approach to structuring content or data in the business world. There is very often resistance from senior management, who hesitate to spend precious budget on cost-saving measures, as well as pushback from established teams who have not yet bought into the methodology. Fleur Levitz shares practical advice with taxonomists looking to break into the corporate world, including strategies on communicating ROI to senior management, getting buy-in and establishing credibility with cross-disciplinary teams, as well as developing business-specific skills to broaden your impact beyond traditional taxonomy work.

4:15 p.m. 4:55 p.m.
Semantic Ontologies in Your Enterprise
Dave McComb, President, Semantic Arts, Inc.

Hundreds of major corporations such as Boeing, NASA, and TVA already employ semantic-based technologies to directly improve the effectiveness of their information systems. Between 35% and 65% of the $300 billion being spent per year on systems integration is attributable to resolving semantic mismatches between systems. Almost all of our newest promising technologies such as web services, XML, business rules, and business intelligence depend on semantics for the success of their implementation. Dave McComb covers three case studies that show how ontologies have been used as the basis for SOA modeling, cross domain searches and semantic wiki and the use of ontologies to support large scale entity extraction.

5:00 p.m. – 5:45 p.m. • *Thurgood Marshall Ballroom*
Everyone Regroups for a Standards Update
Marjorie Hlava, President, Access Innovations, Inc.

Marjorie highlights the current state of standards, including SKOS, OWL, and others, as well as their implications for those working on taxonomies, ontologies, or folksonomies.

Beyond the Basics Track • *Madison Room*

10:30 a.m. – 10:50 a.m.
Taxonomy Alignment: EU Publications Office
Laurent Bégin, Senior Consultant, Mondeca

The Publications Office of the European Union launched several initiatives to leverage the Office's controlled vocabularies and indexing tools to facilitate metadata interoperability and access to multilingual government content. One initiative, a taxonomy alignment, aims to improve automatic indexing and re-indexing of existing content, support automatic query expansion, and ultimately, help the Publication Office to join the "Linked Data" community. It uses advanced semantic technologies and is specifically powered by AROMA, INRIA Exmo's ontology matcher. This talk explains why and how the EU relies on taxonomy alignment to achieve its objectives and covers: the technology behind semantic ontology matching, examples of alignment between various taxonomies and thesauri, manual quality control, and validation of matching relations based on scores.

10:50 a.m. – 11:10 a.m.
Rebuilding Taxonomy Warehouse as an Ontology
Dave Clarke, CEO, Synaptica International, Ltd.

With more than 3.5 million hits, Taxonomy Warehouse is a popular online resource for people researching information about taxonomies. This year the site is being completely rebuilt as an online ontology. This case study reviews the data modeling and design process required to convert a directory database into an ontology. It examines facet analysis and the definition of attributes and semantic relationships. While discussing the challenges and rewards of the conversion exercise, the session compares the before and after versions of the website, explores the boundary between taxonomy management systems and content management systems, and discusses the idea that as taxonomies evolve into ontologies, they become not merely a means to access information, but information in their own right.

11:10 a.m. – 11:30 a.m.
Taxonomy Design for Open Source Digital Asset Management Systems
Michael Lauruhn, Disruptive Technology Director, Elsevier Labs
Joseph Busch, Senior Principal, Project Performance Corp.

The University of California, San Francisco (UCSF) School of Pharmacy's Communications and Planning Unit has established and is maintaining a web-based digital asset collection. These digital assets are used for school web story illustration, media requests, publications, announcements, and presentations. This session reports on the design and implementation of the metadata scheme for the open source digital assets repository. The scheme needed to include asset metadata about the objects, as well as controlled vocabularies and keywords to describe and categorize them. The taxonomy development process identified image-specific fields that describe the visual image content, going beyond the literal "who-what-where," to attributes such as number of people, types of scenes, and others that could be considered a more abstract representation of the visual content. The digital assets taxonomy has served the repository very well, meeting the goals to enhance searching for assets and making them easier to manage.

11:30 a.m. – 11:50 a.m.
Bank for International Settlements Document Management Strategy Taxonomy
Dorothea Jama-Auerswald, Senior Business Analyst, Bank for International Settlements
Joseph Busch, Senior Principal, Project Performance Corp.

The Bank for International Settlements (BIS) is an organization of central banks that seeks to make monetary policy more predictable and transparent among its members. As part of the process of reviewing its document management processes, the BIS worked with functional area stakeholders to consider how documents might better be categorized so that categorizing, finding, and archiving documents would be easy and efficient. It developed a practical document categorization strategy to implement in the document management application environment and to maintain it over time. This session discusses the BIS taxonomy strategy and key features, such as making ad hoc categorizations in document titles to group related documents an explicit part of the taxonomy, making large complex taxonomies of activities and content discrete and concise, and mapping existing categories to the new scheme to facilitate content migration.

12:00 p.m. – 1:15 p.m. • *Thurgood Marshall Ballroom*
KEYNOTE LUNCHEON:
Semantic Technology: Why?
Jeremy Bentley, CEO, Smartlogic

1:15 p.m. – 2:00 p.m.
Taxonomies & Ontologies for Content Management and Search
Dean Allemang, Chief Scientist, TopQuadrant, Inc.
Anthony Rhem, Knowledge Management Consultant/Professor, A.J. Rhem & Associates, Inc.

These two presentations focus on the design, implementation, and deployment of taxonomies and ontologies for content management and search. Anthony Rhem begins by looking at how several organizations use taxonomies and ontologies to improve unstructured content search and retrieval and meet the business expectations of the KM solution. Dean Allemang examines common barriers to getting taxonomies out of the desktop tools and into enterprise use. He draws on experiences with several enterprises in applying taxonomies to content management.

2:00 p.m. – 2:30 p.m.
"Build vs. Buy" & Standards-Based Taxonomy Management
Bob DuCharme, Solution Architect, TopQuadrant, Inc.

When implementing a taxonomy management solution, the disadvantages of both custom systems and full-featured vendor solutions can be mitigated by using standards-based software. Software libraries and services with web-based interfaces that support open standards can provide building blocks that enable quicker assembly, implementation, and rollout of a custom solution. DuCharme reviews standards such as ANSI Z39.19, XML, SKOS, and ISO 25964 as well as standards-based free and commercial tools to consider.

2:30 p.m. – 3:00 p.m.
Hierarchies & Polyhierarchies: Is More Better?
Sherry Chang, Technical Lead, Intel
Heather Hedden, Senior Analyst, Project Performance Corp.

There are differences of opinion regarding the implementation of what is called a "polyhierarchy." Looking at case study examples, Heather Hedden considers where polyhierarchies are beneficial and where they result in needless complication, identifying the fine line between too much and not enough. Sherry Chang examines how Intel used taxonomy software to manage multiple hierarchical pathways with a common base of terminology. She shares Intel's strategy of a unified terminology base while allowing different business groups to build different hierarchies using a common term set, lessons learned regarding standards conflicts, building business rules for a new class of hierarchical behavior, and the development of multiple parallel hierarchies.

3:00 p.m. – 3:15 p.m.
COFFEE BREAK

3:15 p.m. – 3:45 p.m.
Avoiding the Autobiographical Taxonomy
Gary Carlson, Principal, Gary Carlson Consulting

Taxonomies are an explicit description of an organization's goals and world view. However, they all too often end up exposing the biases or views of a small group within the organiza-

tion. Gary Carlson dissects real-world taxonomies and navigation schemes to see what they tell us about the organization or taxonomists that built them. He discusses the role of web analytics, market research, user research, personas, and other sources that can be utilized in guiding the development of a truly business-focused taxonomy.

3:45 p.m. – 4:15 p.m.
Enabling Social Media Through Metadata
Christian Buckley, Director, Product Evangelism, Axceler

Many companies, whether considering further investment in their SharePoint 2007 deployments or planning upgrades to SharePoint 2010, are reviewing their social media strategies. Users are chomping at the bit to deploy and use the new, natively supported social media features in SharePoint 2010. But most administrators do not fully understand the taxonomy and data governance issues within SharePoint that are associated with these kinds of solutions. Christian Buckley walks participants through the taxonomy and governance implications of the social media capabilities within SharePoint 2007 and 2010. He provides informa-

tion to prepare organizations for these tools, as well as examples on how to approach setting up and managing metadata, aligning these tools with their broader corporate content management strategies, and maintaining manageability of a SharePoint environment through governance.

4:15 p.m. – 4:55 p.m.
### Empirical Approaches to Taxonomy Development
Patrick Lambe, Straits Knowledge & Author, Organising Knowledge: Taxonomies, Knowledge and Organisation Effectiveness

The history of taxonomy development has its roots in theory-informed, practice-based approaches, often dependent on the knowledge and resources of subject matter experts to inform the choice and arrangement of terms and concepts. The nature of taxonomy work has shifted with the rise of digital content, requiring a deeper understanding of the different user communities and a need to represent their information landscapes in ways that they recognize. The body of knowledge in this area is now at a stage where it is possible to begin exploring empirical approaches to taxonomy development that are less reliant on individual perspective and more grounded in the actual use of the terminology in context. Examples of effective empirical approaches illustrate techniques and tools that are now available for the taxonomy developer faced with a new project.

5:00 p.m – 5:45 p.m • *Thurgood Marshall Ballroom*
Everyone Regroups for a Standards Update
Marjorie Hlava, President, Access Innovations, Inc.
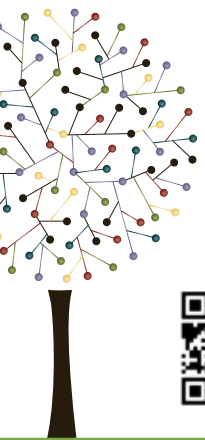
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October 31–November 1, 2011
Washington Marriott Wardman Park
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Ramp up your Taxonomy Boot Camp experience by connecting with other attendees and speakers today.

Get the conversation started by using Twitter tag **#TaxoBC**.

Don't miss a thing!

Welcome Reception

6:00 p.m. – 7:00 p.m. • *Maryland Suite, Lobby Level*

Join us for drinks and hors d'oeuvres in a relaxed atmosphere. Continue the day's discussions with new colleagues, meet and talk with conference speakers and sponsors, or unwind with old friends after an insightful day of sessions.

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Smartlogic is a software company that specializes in Content Intelligence. Smartlogic's Semaphore is a Content Intelligence Platform which complements an organization's investments in enterprise search, business intelligence and content management to provide effective, rapid and accurate control of, and access to, unstructured content with a speed, accuracy and intelligence not achievable today through existing systems that are strained from soaring information

volumes. Semaphore endows these systems with capabilities, such as taxonomy and ontology management, automatic classification and contextual navigation, so that organizations can better find, organize, process, monetize, control and govern unstructured content.

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Synaptica delivers taxonomy management software solutions that simplify the building, maintenance and integration of taxonomies, ontologies, and authority files. Synaptica is a highly scalable enterprise application. Integration points include database APIs, web services, and a SharePoint connector. In 2011 *KMWorld* magazine voted Synaptica "Trend-Setting Product of the Year."

All sessions are located on the Mezzanine Level.

8:00 a.m. – 8:45 a.m. • *Thurgood Marshall Ballroom*
CONTINENTAL BREAKFAST

KEYNOTE

8:45 a.m. – 9:45 a.m. • *Thurgood Marshall Ballroom*
Architecting a Connected Enterprise
Jeremiah Owyang, Industry Analyst, Altimeter Group

Owyang, a leading web strategist and industry analyst, discusses collaborative enterprises of the future. He provides tips for building networked enterprises that share and apply knowledge for decision-making, innovation, customer satisfaction, business success, and a stronger bottom line. Owyang illustrates with real-world examples and is sure to spark insights for you to build a high performing networked enterprise that connects employees, customers, prospects and partners.

KEYNOTE

9:45 a.m. – 10:00 a.m. • *Thurgood Marshall Ballroom*
KM Solutions in the Cloud
Whitney Tidmarsh Bouck, General Manager, Box Enterprise

More than ever, IT is being held accountable for protecting valuable business information and intellectual property. Meanwhile, users are demanding better technology that provides the straightforward and intuitive characteristics of consumer technology for sharing content, collaborating with others and accessing information from mobile devices. Hear from Whitney Tidmarsh Bouck and a key Box client about how cloud-based solutions provide companies of all sizes with the ability to meet the demands of end users and lower total cost of key applications while still protecting corporate information.

10:00 a.m. – 10:30 a.m.
COFFEE BREAK

Information Architecture Track • *Wilson Room*
*Moderated by **Seth Earley**, Earley & Associates*

10:30 a.m. – 11:15 a.m.
IA for Taxonomists: Seeing Your Ideas Through to Execution
Seth Earley, President, Earley & Associates

Seth Earley leads off this track with a brief overview of the latest developments in information architecture, and then facilitates the track sessions and audience Q&A on content management, SharePoint, metadata and, of course, challenges!

Content in Information Architecture
Mike Doane, Content Architect, Ascentium

There is a symbiotic relationship between content and information architecture, but they really are two different aspects of creating an effective online presence. As companies develop more diverse and complex channels for content delivery (mobile, social, UGC, microsites, etc.), the demand is greater than ever to create and implement a content strategy that takes into account how content is to be delivered, what content should be created and why. Mike Doane identifies three strategic and tactical approaches to successfully integrating content and IA into a cohesive plan for delivering outstanding online experiences.

11:30 a.m. – 12:15 p.m.
Building an Effective Information Architecture Strategy for SharePoint 2010
Dave Coleman, SharePoint Consultant, Twynham

One reason many SharePoint implementations fail to meet user expectations is lack of investment in underlying information architecture. Some organizations see SharePoint as an out-of-the-box solution to simply plug in and throw content into, but it does require much thought and effort around data structure and organizational principles. Dave Coleman discusses an effective information architecture strategy for SharePoint, from building an information architecture vision to requirements gathering, implementation strategy, and approaches.

16 Million Products on One Shopping Site
Clint Elmore, Taxonomic Data Governance Czar, Sears Holdings Corp.

Sears Holdings Corp. has more than 16,000,000 products to be categorized in a three-level hierarchy. As if that's not challenging enough, the taxonomist must collect relevant product data for navigation and a positive customer experience while balancing the needs of various stakeholders with multiple business objectives.

12:15 p.m. – 1:15 p.m. • *Thurgood Marshall Ballroom*
ATTENDEE LUNCHEON

Taxonomy Tools Track • *Wilson Room*
*Moderated by **Joseph Busch**, Project Performance Corp.*

1:15 p.m. – 2:00 p.m.
Taxonomy Tools Requirements and Capabilities
Joseph Busch, Senior Principal, &
Zachary Wahl, Director of Information Management, Project Performance Corporation

More and more organizations are using controlled vocabularies to provide complete and consistent metadata values in collaboration, document, and content management applications such as SharePoint, Documentum, and Drupal. Managing more complex vocabularies with a tree structure, synonyms and cross-references have additional requirements. Using specific examples from the energy, engineering, finance, and government sectors, the speakers identify simple to advanced taxonomy management functional requirements and the characteristics of taxonomy tools, including a "magic quadrant" for this application category.

Agile for Managing Taxonomy Projects
Ahren Lehnert, Data Archivist/Ontologist, RTI International

With its iterative, incremental methodology, the Agile software development process is a natural fit for taxonomy project management. Frequently, the taxonomist is the liaison between the business side, defining business requirements, and the technical team who define technical requirements and implement the work in the electronic environment. Agile embraces this collaborative methodology and allows for tracking and grouping business and technical tasks to maximize each release of software and functionality.

Text Analytics Track • *Wilson Room*
*Moderated by **Rebecca Jones**, Dysart & Jones Associates*

2:15 p.m. – 3:00 p.m.
Text Analytics in Practice Panel
Seth Grimes, Analytics Strategy Consultant, Alta Plana Corporation
Tom Reamy, Chief Knowledge Architect, KAPS Group

Seth Grimes outlines the different types of text analysis tools available and their strengths and weaknesses. Tom Reamy discusses a recent taxonomy project that combined categorization and entity extraction with advanced text mining techniques to dramatically improve the quality of taxonomies while lowering overall cost and shortening development time. They both then share their collective understanding of what to expect in the next wave of analytic tools and approaches.

3:00 p.m. – 3:15 p.m.
COFFEE BREAK

SharePoint Track • *Wilson Room*
*Moderated by **Mike Crandall**, Senior Lecturer and Chair, The Information School, University of Washington*

3:15 p.m. – 4:00 p.m.
Looking Under the Hood: Metadata Strategy Impacts Everything You Do
Christian Buckley, Director, Product Evangelism, Axceler

How important is the metadata and a taxonomy strategy? Using some common end-user scenarios with SharePoint (i.e., adding documents to a library, participating in enterprise

workflow, finding technical expertise through new social search features in SharePoint 2010), Christian Buckley illustrates how the lack of a strategy can impact these common scenarios and the ability to leverage the full functionality of SharePoint.

Leveraging Automatically Applied Metadata on a KM Platform to Deliver Permissions, Policy Settings, & Rights Management

David Sanchez, Deputy Program Manager, USAF Pilot Physician Program

Failure of public sector organizations to comply with data transparency, records retention, and data privacy and security directives increases both operational risk and vulnerabilities. Using controlled vocabularies, various organizations within the Department of Defense have significantly reduced risks on KM platforms that have historically demonstrated a lack of data transparency, inappropriate storage and preservation, and unauthorized access and use of sensitive information. David Sanchez demonstrates many of the applications, including instant synchronization of taxonomies and controlled vocabularies with the SharePoint term store, and automatic tagging of records retention code.

4:15 p.m. – 5:00 p.m.

Case Study: Microsoft's Experience With Modeling Term Sets in SharePoint 2010

Gary Carlson, Principal, Gary Carlson Consulting
Pam Green, Program Manager, Microsoft

SharePoint 2010 significantly increased the functionality for the management and governance of taxonomies (Term Sets). Gary Carlson and Pam Green describe the process used to identify the essential taxonomy governance requirements for two different content areas as well as the taxonomy model, workflows, native SharePoint functionality, and reports needed to provide a governance structure that was both flexible enough for the different divisions but structured enough to allow for global reuse of both the term set values and content.

An Enterprisewide Taxonomy in SharePoint 2010

Karin Michel, Taxonomy Architecture Specialist, SNC-Lavalin

SNC-Lavalin, one of the world's largest engineering and construction firms, has the difficult task of managing information and knowledge transfer. Karin Michel focuses the implementation of its enterprise-wide taxonomy in SharePoint 2010 that articulates different project driven taxonomies. While people are too busy "getting the work done" to engage in information management, an enterprise-wide taxonomy can be a way to motivate change while ensuring knowledge transferability between different specialties and silos.

Grand Opening Reception

5:00 p.m. – 7:00 p.m.

The Enterprise Solutions Showcase will feature the top companies in the KM, CM, search, taxonomy, and intranets marketplace, offering attendees an opportunity to explore the latest product and service solutions. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest developments, be sure to visit the Enterprise Solutions Showcase. Open to all conference attendees, speakers, and sponsors.

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