

ADVANCE
PROGRAM

taxonomy

BOOT CAMP >>>>

NOVEMBER 18–19, 2024

JW MARRIOTT | WASHINGTON, D.C.

AGENTS OF CHANGE



AGENDA INCLUDES:

Best practices for developing and implementing taxonomies

Governing taxonomies at scale

Working collaboratively with experts and stakeholders

Measuring and demonstrating taxonomy impact and ROI

Integrating taxonomies into different systems (e.g., search, content management)

Exploring ontologies, knowledge graphs, machine learning, & AI

User research & validation techniques

Case studies from successful taxonomy applications & programs

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NOVEMBER 18–19, 2024

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AGENTS OF CHANGE



CONFERENCE CHAIR
Stephanie Lemieux
Dovecot Studio

The Taxonomy Boot Camp conference is a one-of-a-kind boutique learning and networking event dedicated to exploring the successes, challenges, methodologies, and products for taxonomies.

Taxonomies are not just a static end-product, they are organic and evolving, always growing and adapting to meet new challenges and create new opportunities. Change is a key element in everything we do—change management within organizations, change processes for keeping taxonomies current and useful, and changing to adapt to or drive new tools and technologies such as AI. Change and innovation is happening faster and at a larger scale than ever before, requiring robust governance to balance the needs of multiple consuming systems, evolving language, and increasing automation.

As enterprises embrace advanced technologies like knowledge graphs and AI, change management—in all senses of the word—becomes a key part of taxonomy management. Join us in Washington, D.C., this November to learn from experts on taxonomies, ontologies, folksonomies, tagging mechanisms and other techniques for organizing information, and how taxonomies and taxonomists can be agents for change.

Taxonomy Boot Camp showcases taxonomies as key components of knowledge and data management systems that aim to build collective intelligence within or across organizations and help solve real-world problems. Speakers share their experience in creating successful taxonomy solutions and advice on both hard and soft skills to help our attendees accelerate their learning and success.

The Taxonomy Boot Camp program is designed to provide something for everyone, from taxonomy newbies to seasoned experts (and everyone in between). Beginner sessions provide those new to the field with the nuts and bolts they need to get up-to-speed and give more experienced practitioners insight into how others have evolved their approaches. Also hear case studies, practical sessions on taxonomy tools and methods, and cutting-edge developments in the field.

You can expect to leave Taxonomy Boot Camp with new friends and business allies and fresh ideas and strategies. Join us this November to move your organization and career forward.

WHO SHOULD ATTEND

Taxonomists

Content managers

Information architects

Information

professionals

Knowledge engineers

Information scientists

Intranet/portal

developers

Content classification

strategists

GET MORE WITH THE PLATINUM PASS. IT'S OUR BEST DEAL!

KMWorld 2024 is co-located with four other leading industry events: Taxonomy Boot Camp, Enterprise Search & Discovery, Text Analytics Forum, and Enterprise AI World. You may choose to attend any one of these concentrated programs individually. But, if you are seeking to create a comprehensive enterprise strategy that incorporates search as part of a larger knowledge management, content management, or collaborative strategy and want to better leverage taxonomies, text analytics and AI, be sure to register for the Platinum Pass.

➤ **MORE CONTENT.** Get access to KMWorld 2024, Enterprise Search & Discovery, Text Analytics Forum, Enterprise AI World plus Taxonomy Boot Camp OR two workshops—in one location, for a unique opportunity to broaden your understanding of knowledge management, content management, text analytics, collaborative and digital strategies, and acquire the information, tools and strategies you need to create a successful, knowledge-based enterprise. Choose from 100+ keynotes, sessions, and in-depth workshops.

➤ **MORE NETWORKING.** Connect with your peers and over 200+ speakers for the opportunity to learn from the leaders and innovators in the field at a variety of networking events, including breakfasts, coffee breaks, lunches, and two receptions on the show floor PLUS curated Knowledge Cafe mentoring sessions, a Communities of Interest meetups, and more.

➤ **MORE SAVINGS.** The Platinum Pass is designed to give you unparalleled access to multiple compelling industry events at one amazing location and low price. Each pass, if purchased separately at its regular rate would cost over \$5,000, but with a Platinum Pass, you'll have access to four events PLUS Taxonomy Boot Camp or two workshops for just \$1,995 when you register with early-bird rates by October 18.

Take advantage of all that KMWorld 2024 and its co-located events have to offer. Find out more below and then register for a Platinum Pass for full access to these distinct, but synergistic, conferences.

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ENTERPRISEAIWORLD.COM

CONFERENCE AT A GLANCE

MONDAY, NOVEMBER 18

8:00 a.m. – 9:00 a.m.	CONTINENTAL BREAKFAST	
9:00 a.m. – 9:10 a.m.	Opening Remarks • Lemieux	
9:10 a.m. – 10:00 a.m.	OPENING KEYNOTE • Your Taxonomy Expertise Can Help Drive Organizational Transformation • Stilling	
10:00 a.m. – 10:15 a.m.	COFFEE & NETWORKING BREAK	
	TRACK 1 • Taxonomy Fundamentals	TRACK 2 • Taxonomy Applications
10:15 a.m. – 10:45 a.m.	Fixing a Fixer-Upper: How to Rehab an Existing Taxonomy • Kaari	Using Taxonomy to Move From Paper to Knowledge Graph • Busch
10:45 a.m. – 11:15 a.m.	The Complete Guide to Sourcing Terms • Hedden	Empowering Your Enterprise With a Dynamic Taxonomy Program • Pettai
11:15 a.m. – 12:00 p.m.	Enabling Exploratory Discovery Through Taxonomy • Degler	Extensible Taxonomies for Sustainability • Hlava, Fogelson, Kirk, & Bellur
12:00 p.m. – 1:00 p.m.	ATTENDEE LUNCH	
1:00 p.m. – 1:30 p.m.	Journey From a Minimal Viable Taxonomy to a Full Taxonomy • van Aalten	9 Signs Your Product Data Needs Help • Schweizer
1:30 p.m. – 2:00 p.m.	Nomenclature, Historical Terms, & Shifting Meanings • Greene & Clark Hill	What Can Your Enterprise Content Teach You About Taxonomy (and Vice Versa)? • Downs
2:00 p.m. – 2:30 p.m.	Wrangling Big Datasets: A Case Study • Greenberg	Stand Still Like the Hummingbird: Enterprise Taxonomy Strategy When Nothing Stands Still • Lehnert
2:30 p.m. – 3:00 p.m.	Taxonomy's Role in Successful Asset Management Systems • Levenson	What Is This Data? Annotating Data for Privacy • Vann & Downs
3:00 p.m. – 3:15 p.m.	COFFEE & NETWORKING BREAK	
3:15 p.m. – 4:15 p.m.	Future-Proofing Your Organization's Taxonomy With a Governance Plan • Little, Cantrell, Ratanatharathorn, & Duncan	Taxonomies & AI-Driven Tools as Catalysts: Case Studies • Cakici, O'Brien-Scott, & Maddison
4:15 p.m. – 5:00 p.m.	Updating ISO 25964, the Standard for Thesauri and Interoperability (With Q&A) • Busch & Hlava	Game-Changing Taxonomy and Machine Learning at Electronic Arts • Randle
5:00 p.m. – 6:30 p.m.	ENTERPRISE SOLUTIONS SHOWCASE GRAND OPENING RECEPTION • Sponsored by eGain	

\$
Register on or before October 18th and **SAVE \$200** on your conference registration!

TRACK 3
Taxonomy 101 Workshop
• Jenkins, Black & Clark Hill

TUESDAY, NOVEMBER 19

8:00 a.m. – 8:30 a.m.	CONTINENTAL BREAKFAST	
8:30 a.m. – 9:30 a.m.	KEYNOTE • Collective Superintelligence: Humans in the Loop • Rosenberg	
9:30 a.m. – 9:45 a.m.	KEYNOTE • Using Knowledge Graphs to Improve GenAI • Clarke	
9:45 a.m. – 10:00 a.m.	KEYNOTE • Trusted Knowledge for Customer Service in the Age of GenAI • Roy	
10:00 a.m. – 10:15 a.m.	KEYNOTE • Lessons Learned From Search and GenAI • Probst	
10:15 a.m. – 11:00 a.m.	COFFEE & NETWORKING BREAK in the Enterprise Solutions Showcase	
	TRACK 1 • Taxonomy Operations	TRACK 2 • Advanced Data and Semantic Layers
11:00 a.m. – 11:45 a.m.	Taxonomy as a Service: Adobe's TaaS-timonial • Maddison	Mastering Metadata With a Data Catalog • TBD
11:45 a.m. – 12:15 p.m.	Consulting From Within: Best Practices for the Solo Taxonomist • Griffin	Semantic Layers and the Ghost in the Machine • Lehnert
12:15 p.m. – 12:45 p.m.	Beyond Chat Bots: LLMs & 'Human-in-the-Loop' Taxonomy Development at EA Games • Moore & Gaibort	Untangling Credentialing: A Healthcare Use Case for Data and Metadata • Rodriguez
12:45 p.m. – 1:45 p.m.	ATTENDEE LUNCH in the Enterprise Solutions Showcase	
1:45 p.m. – 2:30 p.m.	Aligning AI Approaches for Taxonomy & Tagging • Jenkins & Lee	
2:45 p.m. – 3:30 p.m.	Practical Strategies: Content Impact With Information Architecture & Taxonomy Systems • Rafat & DiNicola	
3:30 p.m. – 4:15 p.m.	COFFEE & NETWORKING BREAK in the Enterprise Solutions Showcase	
4:15 p.m. – 5:00 p.m.	Stump the Taxonomist • Wahl	
5:00 p.m. – 6:00 p.m.	NETWORKING HAPPY HOUR in the Enterprise Solutions Showcase	

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8:00 a.m. – 9:00 a.m.

Continental Breakfast

9:00 a.m. – 9:10 a.m.

Opening Remarks

Stephanie Lemieux, President, Dovecot Studio



9:10 a.m. – 10:00 a.m.

OPENING KEYNOTE: Be the Change: Your Taxonomy Expertise Can Help Drive Organizational Transformation

Thomas Stilling, Digital Strategist and Metadata Maestro

In today's fast-paced digital world, the role of taxonomy and metadata has never been more critical. And yet, it can be challenging to shape this narrative in any size organization. Stilling delves into the strategic importance of harmonizing taxonomies and creating consistent semantic layers across the organization—and how to explain this to leadership in a way that resonates. Through three compelling case studies, explore how leading organizations have navigated digital transformation journeys, leveraging metadata to drive foundational changes and infrastructure investments. Learn strategies to position taxonomy, often overlooked during pivotal transformation moments, ensuring it plays a central role in your company's major decisions.

10:00 a.m. – 10:15 a.m.

Coffee & Networking Break

TRACK 1 • Taxonomy Fundamentals

10:15 a.m. – 10:45 a.m.

Fixing a Fixer-Upper: How to Rehab an Existing Taxonomy

Jennifer Kaari, Catalog Specialist, OpenSesame

Rehabbing an existing taxonomy presents a unique sense of challenges. How do you get started? Do you rip everything out to the studs? What can be salvaged, and what needs to go? Kaari presents two case studies of taxonomy projects within OpenSesame's elearning marketplace catalog for insights on how to approach redeveloping a well-used (though perhaps not well-loved) taxonomy. Hear how to combine data with user feedback to make effective decisions about terminology and structure, along with the issues related to stakeholder communication and buy-in. Learn how to set yourself up for a smooth transition from taxonomy redevelopment to taxonomy maintenance.

10:45 a.m. – 11:15 a.m.

The Complete Guide to Sourcing Terms

Heather Hedden, Senior Consultant, Enterprise Knowledge, LLC

Whether building a new or revising an existing taxonomy, there are many possible sources for your taxonomy's terms (concepts and labels). Suggestions from users are important, but there are multiple ways to get user input, some more effective than others. Content analysis is a great tool, but the extent to which it is manual or automated can vary. Learn how to utilize search logs, uncontrolled keywords, automatically extracted terms, and leveraging AI and LLM methods. Hedden also explains how to evaluate legacy controlled vocabularies, and metadata terms and also addresses glossaries.

11:15 a.m. – 12:00 p.m.

Enabling Exploratory Discovery Through Taxonomy

Duane Degler, Principal Consultant-IA, Design for Context

Not everything can just be searched. "Aha!" moments deliver value. Exploration leads to insights and surfaces contexts. How do you prepare your content for these user experiences? See some interfaces that integrate public archives and cultural content collections. (They're public: You can explore them after the talk.) The interfaces show how taxonomies and knowledge graphs play a direct role in the UI (not just in the backend). From there, Degler broadens out to other domains, looking at how knowledge graphs provide focused "discovery glue" across repositories and how taxonomies can signpost insights across departments, partner organizations, or countries.

12:00 p.m. – 1:00 p.m.

ATTENDEE LUNCH

1:00 p.m. – 1:30 p.m.

Journey From a Minimal Viable Taxonomy to a Full Taxonomy

Joyce van Aalten, Taxonomy Consultant, Invenier

Taxonomy goals can be extremely ambitious, creating the semantic glue between content and contributing to omnichannel and headless content strategies. However, getting there doesn't happen overnight: Tight budgets, legacy systems, procedures, and people stand in the way. The challenge is to start with a minimal viable taxonomy (MVT) that the organization can use and implement in the short term, without blocking the taxonomy to grow in the future. van Aalten shares her experiences with taxonomy projects that started with an MVT and over time evolved into a more mature taxonomy. Learn how to decide the systems scope, level of granularity, types of semantic relationships and industry standards to follow.

1:30 p.m. – 2:00 p.m.

Nomenclature, Historical Terms, & Shifting Meanings

Teresa Greene, Independent Consultant

Lauren Clark Hill, Client Solutions Specialist, Synptica

The Nomenclature for Museum Cataloging Committee of the American Association for State and Local History is a group made up of museum professionals that maintains a controlled vocabulary for cataloging museum collections of manmade objects. One of the challenges with this is the reconciliation of divergent terms across different historical periods and contexts. Greene and Hill explore solutions and methods of resolving these conflicts and demonstrates how auto-categorization can be used for long-form, unstandardized object descriptions to create deeper tags for collections, enriching and streamlining their cataloging processes and more efficiently leveraging the available human capital.

2:00 p.m. – 2:30 p.m.

Wrangling Big Datasets: A Case Study

Elizabeth Greenberg, Senior Multilingual Taxonomist, Freelance

How do you map and clean large amounts of messy metadata with a tiny team? And how do you do it fast? Greenberg presents an anonymized case study on cleansing millions of assets worth of metadata in a single year using a combination of human review and code. Learn how to prioritize, how to communicate, and how to save money and time by assigning the right tasks to a program instead of a person.



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and **SAVE \$200!**

2:30 p.m. – 3:00 p.m.

Taxonomy's Role in Successful Asset Management Systems

Yonah Levenson, *Co-Academic Director/Instructor, Rutgers University*
 Metadata and taxonomies are the backbone of asset management. Whether you have a DAM, CMS, MAM, or PIM system (or a mix of these), understanding the current and desired workflows of metadata capture is key to success. When and where in the process the data is updated and/or extended and ultimately finalized influences and shapes the taxonomies and their application. Strategic design and integration of flexible taxonomies that are fit for purpose are crucial. Levenson describes approaches for taxonomy development by understanding the “who, what, where, when, why, and how” of multiple workflows and systems.

3:00 p.m. – 3:15 p.m.

Coffee & Networking Break

3:15 p.m. – 4:15 p.m.

Future-Proofing Your Organization's Taxonomy With a Governance Plan

Paula Little, *Lead Senior Information Architect & Taxonomist, & Connor Cantrell*, *Information Architect, Factor Firm*

Kristen C. Ratanatharathorn, *Senior Manager—Grant Information & Administration, The Andrew W. Mellon Foundation (AWMF)*

Stephanie Duncan, *Taxonomy Consultant, Dovecot Studio*

Change is inevitable, but designing (and following) a governance framework is much easier said than done. Little & Cantrell explore some of the key pillars of a good governance plan, including business drivers for taxonomy changes, guidelines for balancing proactive and reactive workflows, and communication and training plans using case studies of recently implemented plans. Learn the critical role documentation plays in change management and the types of documentation needed for success. Ratanatharathorn and Duncan describe the governance and maintenance strategies for the Grant Classification Taxonomy, which has been in use since September 2021 at the AWMF. Hear their processes and best practices for understanding and documenting use cases, vetting them, and balancing the perspectives of different user groups in order to cultivate a taxonomy that suits the needs of many.

4:15 p.m. – 5:00 p.m.

Updating ISO 25964, the Standard for Thesauri and Interoperability (With Q&A)

Joseph Busch, *Principal, Taxonomy Strategies*

Marjorie Hlava, *Chief Scientist, Access Innovations*

Even if you follow all standards and best practices for taxonomy and metadata design, you can't know for sure if a system is working until after it's in production. Jenkins reviews her approach to auditing and improving a taxonomy 1 year after launching a taxonomy-driven website, looking at metrics, stakeholder feedback, and governance challenges. Ingham & Barkin discuss the pillars of metadata quality (completeness, accuracy, and consistency), sharing a recent experience operationalizing in the context of enterprise digital content management. They cover metadata, quality metrics, and the role of automation in addressing issues.

TRACK 2 • Taxonomy Applications

10:15 a.m. – 10:45 a.m.

Using Taxonomy to Move From Paper to Knowledge Graph

Joseph Busch, *Principal, Taxonomy Strategies*

A transit authority has undertaken an initiative to eliminate legacy paper records, to downsize their footprint, and relocate 3,000

office-based employees spread across 10 aging buildings. Busch describes the metadata strategy and taxonomy framework that emerged from working with more than 60 business units from across the authority. Learn how the named entities (people, organizations, locations, events, things, etc.), classifications (incidents, document file plans, system maps, access control, etc.) and the relationships among them can be used as the building blocks for a transit system knowledge graph.

10:45 a.m. – 11:15 a.m.

Empowering Your Enterprise With a Dynamic Taxonomy Program

Lindsay Pettai, *Data Governance Manager, Grant Thornton LLP (Canada)*

In data governance, an enterprise taxonomy program is essential for navigating data complexities, enabling efficient management, and structuring knowledge assets. Hear about how Pettai and her team are expanding Grant Thornton's enterprise taxonomy program and platform through the integration of controlled vocabularies across four enterprise applications. Learn about their approach to taxonomy governance, adoption strategies, and the tangible ROI from this transformative initiative. Attendees gain insights into effective change management and communication strategies, along with artifacts which aid implementing an enterprise taxonomy program.

11:15 a.m. – 12:00 p.m.

Extensible Taxonomies for Sustainability

MODERATOR: **Marjorie Hlava**, *Chief Scientist, Access Innovations*
 PANELISTS:

Joann Fogelson, *Director of Digital Publishing, ASCE*

Rebecca Kirk, *Taxonomist and Director of Manuscript Submissions, PLOS*

Prakash Bellur, *Senior Director Marketing & Sales, IEEE*

Sustainability is on the minds of many organizations. The United Nations created a broad outline on sustainability, but providing actionable data is an important additional step. For publishers, creating collections on the topic from their existing materials to aid researchers to quickly find the connections is paramount. The general challenge for organizations with a well-organized collection and existing thesaurus/taxonomy is how to pull out the material on sustainability and still coordinate with the “master” taxonomy, which is true for all collections requiring marketing and showcasing content for specific audiences and needs. Learn how three organizations have approached the topic of sustainability and presentation of materials best suited to answer the questions from both readers and researchers on the topic.

12:00 p.m. – 1:00 p.m.

Attendee Lunch

1:00 p.m. – 1:30 p.m.

9 Signs Your Product Data Needs Help

Chantal Schweizer, *Director of Strategic Data Services, Pivottree*

Product data issues can arise in a number of ways from a messy onboarding experience to a bad search experience to even a bad channel grading affecting a company's relationship with distributors. Schweizer explores different ways that bad data may surface and how to tackle those issues to increase revenue, conversion rates and decrease data production costs.

1:30 p.m. – 2:00 p.m.

What Can Your Enterprise Content Teach You About Taxonomy (and Vice Versa)?

Sarah Downs, *Director of Client Solutions, Synaptica*

Taxonomy design often starts with a content audit, but once a taxonomy is in production, how often do we test and improve it with

real-time content feedback? A constructive feedback loop—from taxonomy to content and back again—is often limited by technical constraints. Taxonomists may require data science or engineering solutions to sample content, analyze it, and deploy taxonomy improvements. But there is another way: By extending enterprise taxonomies for autocategorization, enterprises can support human-in-the-loop, machine-driven tagging. When you integrate a transparent text analytics service that can be adapted with rules, you can enable nontechnical taxonomist users to power this process: no coding or scripting skills required. If these annotations are stored in a “content aware knowledge graph,” your taxonomy data can power insight into content trends and nuanced content recommendations.

2:00 p.m. – 2:30 p.m.

Stand Still Like the Hummingbird: Enterprise Taxonomy Strategy When Nothing Stands Still

Ahren Lehnert, Principal Taxonomist, Nike Inc.

One of the foundational pillars for managing data and content is consistent, centralized, accessible metadata in the form of taxonomies and ontologies. Even when an organization recognizes the value of taxonomies, how do you begin to develop an enterprise taxonomy strategy across siloed, incongruous, and duplicative data systems? How do you scale from a few terms in a spreadsheet to an enterprise taxonomy program laddering up to business goals and key performance indicators? How do taxonomists balance the need to build sustainable semantic models while serving business needs and keeping up with the pace of enterprise delivery? Learn techniques for developing and maintaining a successful enterprise taxonomy strategy even in rapidly changing, complex (perhaps even chaotic) business environments where nothing stands still.

2:30 p.m. – 3:00 p.m.

What Is This Data? Annotating Data for Privacy

Briana Vann, Privacy Taxonomist, Meta

Sarah Downs, Director, Client Solutions, Synptica

Data annotation for compliance with global privacy regulation requires complex data models—preferably an ontology, but possibly a taxonomy—to bridge the gap between abstract privacy concepts and granular data realities. Building this bridge requires nuanced data modeling but also learning from and supporting diverse perspectives. Policy experts and engineers conceive and describe data significantly differently and that evolves over time. Vann and Downs describe the facets of data that are relevant for privacy: ownership, origin, intent, consent, storage format, semantic meaning. Through working examples, learn how this data can be modeled and explore the trade-offs between modeling nuance and practicalities including UX/UI and incentives.

3:00 p.m. – 3:15 p.m.

Coffee & Networking Break

3:15 p.m. – 4:15 p.m.

Taxonomies & AI-Driven Tools as Catalysts: Case Studies

Tatiana Baquero Cakici, Senior KM Consultant, Enterprise Knowledge, LLC & Sara Mae O'Brien-Scott, Senior Semantic Engineering Consultant, Enterprise Knowledge, LLC

Rachael Maddison, Product Manager, Taxonomy as a Service Platform, Adobe

AI solutions, such as recommendation engines and chatbots, are gaining traction in solving a multitude of business and content problems. Baquero Cakici illustrates how various AI tools such as recommendation engines, chatbots, and employee 360 views can help solve learning content management challenges. Hear about

practical considerations, design methods, and best practices for designing learning taxonomies and ontologies to catalyze AI transformations, and how to get started. Maddison shows how Adobe Learn's Taxonomy as a Service platform delivers unique value by providing an AI-driven tool that unlocks cross-silo insights for their content creators, content strategists, and content experience teams in something they've coined as “MetaHealth.” See real-life examples that show how marrying taxonomic metadata with content engagement data can unlock key capabilities.

4:15 p.m. – 5:00 p.m.

Game-Changing Taxonomy and Machine Learning at Electronic Arts

Rebekah Randle, Taxonomist, Electronic Arts (EA)

Dive headfirst into the world of gaming taxonomies through “Project K”: a story of how Electronic Arts (EA) harnesses the power of taxonomies to organize and label a universe of digital assets used in video games—from combat weapons and high-speed vehicles to the minutiae of vegetation and furniture. Hear how assets from two blockbuster EA video games were reprocessed, meticulously labeled, and made accessible for artist reuse. Randle explains how machine learning models were trained using these taxonomies and then used to turbocharge human tagging during the processing pipeline. Discover how taxonomies are reshaping the future of digital asset management and machine learning in the gaming industry.

TRACK 3 •

2:00 p.m. – 5:00 p.m.

Taxonomy 101 Workshop

Michele Ann Jenkins, Senior Consultant &

Katherine Black, Senior Consultant, Dovecot Studio

Lauren Clark Hill, Client Solutions Specialist, Synptica

Whether you are brand new to the world of taxonomy or are looking to solidify your foundational knowledge, this workshop equips you with the key concepts to help you hit the ground running on your own taxonomy work. Starting with an accessible, practical examination of what taxonomies are, learn how they fit into the information and content management landscape and the most common use cases, including dynamic content, search and discovery, and reporting. Explore the three pillars of what makes a good taxonomy good: strategy and style (term selection and form, relationships, synonyms, and other properties), governance (roles and responsibilities, processes, and documentation), and technology (technical standards, taxonomy tools, metrics, and analytics needed to implement, integrate, and monitor a taxonomy across platforms). Hear about the more advanced approaches such as knowledge graphs, ontologies, and AI tools. Clark also gives a special deep dive on practical taxonomy change management, including policies, approval workflows, and various methods of versioning and tracking.

GRAND OPENING RECEPTION

MONDAY, NOVEMBER 18 | 5:00 P.M. – 6:30 P.M.

Celebrate the grand opening of the Enterprise Solutions Showcase. Explore the latest products and services from the top companies in the marketplace while enjoying drinks and light bites. Open to all conference attendees, speakers, and sponsors.

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8:00 a.m. – 8:30 a.m.
Continental Breakfast



8:30 a.m. – 9:30 a.m.
KEYNOTE: Collective Superintelligence: Humans in the Loop

Louis Rosenberg, CEO, Unanimous.AI & Author, Our Next Reality: How the AI-Powered Metaverse Will Reshape the World

We need new frameworks for AI-powered decision making that keep humans in the loop (along with human values, morals, interests, emotions, and sensibilities). Rosenberg discusses an approach toward enabling collective superintelligence that is rooted in hundreds of millions of years of evolution, which is why it so greatly outperforms old-school methods that treat humans as mere datapoints to be aggregated. Humans are not data. Humans are powerful data processors. The most viable pathway to collective superintelligence is to connect people together in real time and allow them to act, react, and interact using AI as the interstitial tissue that empowers us to solve problems together in optimal ways. A lifelong technologist, Rosenberg earned his Ph.D. from Stanford University in the early 1990's, was a professor at California State University in the early 2000's and has been focused on enabling collective superintelligence for the last decade. He shares his insights and ideas for enterprises looking for ways to share knowledge in their organizations.



9:30 a.m. – 9:45 a.m.
KEYNOTE: Using Knowledge Graphs to Improve GenAI

Dave Clarke, EVP, Semantic Graph Technology, Squirro

GenAI RAG uses natural language understanding (NLU) and natural language generation (NLG) capabilities of LLMs to securely support conversational search and discovery over enterprise content and data repositories. But GenAI and RAG alone are not enough to ensure the completeness and accuracy of information for many mission-critical enterprise applications. Knowledge graphs (KGs), including enterprise taxonomies and ontologies, can significantly improve the completeness and accuracy of information retrieved and generated by GenAI applications. Taxonomies and ontologies provide GenAI with machine-intelligible context about the domain knowledge and processes of the enterprise. When KGs and GenAI are integrated, taxonomists and ontologists can see and rapidly edit graph structures that explicitly guide RAG decision-making processes. With a simple no-code interface, taxonomists and ontologists are empowered to directly control GenAI dependencies, query refinement, and outcomes, thereby delivering high-quality, high-value business process automation. Using real world applications, our knowledgeable speaker illustrates how using knowledge graphs improves enterprise GenAI.



9:45 a.m. – 10:00 a.m.
KEYNOTE: Trusted Knowledge for Customer Service in the Age of GenAI

Ashu Roy, CEO, eGain

There is no question that GenAI has reignited interest in KM. Gartner predicts that 100% of GenAI virtual customer assistant and virtual agent assistant projects that lack integration to modern KM systems will fail to meet their CX and operational cost-reduction goals by 2025. As businesses experiment with GenAI, they are realizing that robust KM is foundational to its success. Roy discusses how KM and GenAI can accelerate and ensure mutual success, creating transformational business value at warp speed. He shares stunning success stories from clients. Get insights and ideas for your enterprise.



10:00 a.m. – 10:15 a.m.
KEYNOTE: Lessons Learned From Search and GenAI

Sid Probstein, Founder & CEO, Swirl

The world of information is exploding, but finding what you truly need can still feel like searching for a needle in a pile of needles. Probstein explores how search and GenAI are joining forces to revolutionize how we discover information. He delves into the lessons learned from traditional search and how AI is pushing the boundaries. He shares real-world examples and discusses how this powerful synergy is shaping the future of information discovery.

10:15 a.m. – 11:00 a.m.
Coffee & Networking Break in the Showcase

TRACK 1 • Taxonomy Operations

11:00 a.m. – 11:45 a.m.

Taxonomy as a Service: Adobe's TaaS-timonial

Rachael Maddison, Product Manager, Taxonomy as a Service Platform, Adobe

Maddison explains how her team introduced the Taxonomy as a Service Platform (TaaS) at Adobe, envisioning a centralized solution for taxonomy design, implementation, and governance for more intuitive client adoption. TaaS revolutionizes the approach to taxonomy, offering a one-stop-shop experience tailored to diverse taxonomy client needs. Also hear how Adobe uses OKRs and KPIs to win over leadership and get things done. Maddison shares OKR and KPI templates for you to use in your journey to taxonomy stardom in your company.

11:45 a.m. – 12:15 p.m.

Consulting From Within: Best Practices for the Solo Taxonomist

Bonnie Griffin, Taxonomist, PayPal

Taxonomists often work solo within an organization but collaborate with a variety of data scientists, content strategists, project managers, and more who may have a limited understanding of taxonomy. Whether you are operating as a de facto internal consultant or planning work as an external consultant or contractor, Griffin shares some "do's" and "don'ts" of consulting that can set you up for success. Learn these best practices, such as introducing and advocating for taxonomy-driven solutions, effective project scoping, adapting to changing priorities (especially amidst the drive for generative AI-driven solutions), and the art of compromise.



Register by October 18th
and **SAVE \$200!**

12:15 p.m. – 12:45 p.m.

Beyond Chat Bots: LLMs & 'Human-in-the-Loop' Taxonomy Development at EA Games

Shannon Moore, Senior Taxonomy Analyst & Max Gaibort, Associate Taxonomy Analyst, Electronic Arts (EA)

EA's taxonomy team outlines their innovative collaboration with the data science team. Discover how they've redefined taxonomy development by harnessing the power of advanced LLMs to process player support data and using GenAI to generate candidate terms, forming the backbone of their work. Hear about the "human-in-the-loop" approach, where human taxonomy experts meticulously analyzed, clustered, and refined these terms into structured taxonomies adhering to logical standards and best practices. This case study highlights how human intelligence can enhance AI to set new benchmarks in the industry

TRACK 2 •

Advanced Data and Semantic Layers

This track addresses the advanced data applications and usages of the semantic layer that employ taxonomies and ontologies to realize business value. It explores how organizations are leveraging semantics to unite their information in all its forms to realize the full value of their collective knowledge, align disparate sources and systems, and fuel AI.

GUEST CHAIR: *Zach Wahl, CEO, Enterprise Knowledge, LLC*

11:00 a.m. – 11:45 a.m.

Mastering Metadata With a Data Catalog

Speaker TBD

Increasingly, the world of data is waking up to the importance of taxonomies and metadata. Hear an end-to-end case study of an enterprise data catalog, from design through implementation, explaining the critical roles that taxonomy and metadata play in data governance, findability, and reuse.

11:45 a.m. – 12:15 p.m.

Semantic Layers and the Ghost in the Machine

Ahren Lehner, Principal Taxonomist, Nike Inc.

Effective, unbiased machine learning models require clean, consistent, contextual, and well-considered data. Together, taxonomies and ontologies are the semantic layer representing an organization's subject matter expertise, shared understanding, knowledge, and viewpoint applied to content and data powering a variety of applications. As such, they are at risk of carrying inbuilt subjectivity and bias—a ghost in the machine—flowing into other data consuming systems and machine learning models. Learn processes for modeling, building, and applying semantic models representing the business while reducing the introduction of biases which can skew downstream applications.

12:15 p.m. – 12:45 p.m.

Untangling Credentialing: A Healthcare Use Case for Data and Metadata

Laura Rodriguez, Knowledge Manager, HealthStream

As a healthcare learning, credentialing and scheduling company, Healthstream manages lots of user credential information. The knowledge management team is working to make this a more valuable data set by enhancing their Credentials taxonomy with a robust ontology. This will allow for more nuanced state specific data as well as allow us to bring together useful information that is currently siloed in multiple products and data stores that aren't all using a common vocabulary. The ultimate goal is to create a high-quality curated dataset of credentials that would be easy to verify and report on.

12:45 p.m. – 1:45 p.m.

Attendee Lunch in the Showcase

1:45 p.m. – 2:30 p.m.

Aligning AI Approaches for Taxonomy & Tagging

Michele Ann Jenkins, Senior Consultant, Dovecot Studio

Erik Lee, Taxonomist, Factor Firm

As the AI rush began, companies created directives to integrate AI into their products to avoid getting left behind. The result of this "AI for AI's sake" mindset has been a slew of poor implementations and worse outcomes. However, it is possible to know if, when, and how to integrate AI intentionally into a project by aligning integration with your methodology. Lee explores the spectrum of available tools, ranging from manual effort to advanced techniques leveraging multiple AI techniques—spoiler: it's not just LLMs! Jenkins dives deeper into the key use case around using different approaches to validate and enhance metadata tagging workflows to reduce the burden on content creators and improve quality. Hear caveats, considerations, and risks involved in adding AI automations to tagging workflows. Learn the practical applications of AI in taxonomy and tagging illustrated with real-world examples that can be implemented today, as well as insights into what's on the horizon for tomorrow.

2:45 p.m. – 3:30 p.m.

Practical Strategies: Content Impact With Information Architecture & Taxonomy Systems

Mandana Rafat, Director, Organic Growth & Retention, Skillshare

Celia DiNicola, Deputy Director, Stand Together

Explore the pivotal role of information architecture (IA) and taxonomy structures in driving organic growth and maximizing the impact of content marketing efforts. Learn how effective IA and taxonomy can enhance organic growth by optimizing content discoverability, improving user experience, and boosting search engine visibility. There's also a synergy between ontologies and AI in augmenting content marketing strategies for future success. Rafat provides real-world examples to illustrate successful implementations and give you actionable strategies and insights to leverage IA effectively. DiNicola shows how Stand Together tackled a simplification process during its last redesign and replatforming to identify core audiences and negotiate content categorization, building the taxonomy structure that matters and works for users and authors

3:30 p.m. – 4:15 p.m.

Coffee & Networking Break in the Showcase

4:15 p.m. – 5:00 p.m.

Stump the Taxonomist

Zach Wahl, CEO, Enterprise Knowledge

Interested in industry trends? Stymied by a taxonomy design challenge at work? Bring your toughest, crunchiest taxonomy issues and challenges to our panel of seasoned full-time taxonomists, who compete to answer your questions with insight, entertainment, and perhaps even controversy! The best questions (as voted by the audience) will bring home prizes!

NETWORKING HAPPY HOUR

TUESDAY, NOVEMBER 19 | 5:00 P.M. – 6:00 P.M.

Stop by the Enterprise Solutions Showcase after a full day of stimulating sessions to mix and mingle with other attendees, speakers, and our conference sponsors.

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NOVEMBER 18–19, 2024

JW MARRIOTT | WASHINGTON, D.C.

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GENERAL INFORMATION

SHOWCASE HOURS

Monday, November 18 5:00 p.m. – 6:30 p.m.

Grand Opening Reception • Sponsored by **eGain**

Tuesday, November 19..... 10:00 a.m. – 6:00 p.m.

Networking Happy Hour..... 5:00 p.m. – 6:00 p.m.

Wednesday, November 20 ... 10:00 a.m. – 4:00 p.m.

ENTERPRISE SOLUTIONS SHOWCASE

The Enterprise Solutions Showcase is a one-stop shop for serious buyers to meet with vendors offering knowledge management, content management, enterprise search, taxonomy, and intranet-related products and services. If you are looking for a particular product, evaluating competing systems, or keeping up with the latest trends and developments, you need to visit the Enterprise Solutions Showcase.

HOTEL RESERVATIONS

JW Marriott Washington DC

1331 Pennsylvania Avenue, Washington, DC 20004

Discounted guest room rates of \$309 for a single/double room have been arranged for attendees who book on or before October 25, 2024, through Meeting & Travel Consultants, Inc. (MTC), the official housing bureau. Please note that the discounted room block is subject to availability and therefore is not guaranteed, so please book early! As a special consideration guest room Wi-Fi is included in the discounted guest room rate.

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- Pass available to qualified industry professional. Registrants must show business card or proof of industry affiliation.

YOUR REGISTRATION INCLUDES:

- Access to all keynotes & Taxonomy Boot Camp conference sessions on November 18–19
- Continental breakfast each morning before the keynote
- Morning and afternoon breaks
- Attendee luncheons each day
- Admission to the Enterprise Solutions Showcase
- Enterprise Solutions Showcase Grand Opening Reception on November 18
- Networking Happy Hour in the Enterprise Solutions Showcase on November 19
- Access to conference presentations online

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Registration cancellations received on or before September 1, 2024, will receive a full refund with no fees. Registration cancellations received between September 2, 2024, and October 18, 2024, are subject to a \$150 administrative fee, although you can substitute another attendee in your place. After October 18, no refunds will be issued.

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