Gathering Evidence for a Taxonomy: knowledge mapping vs content modelling

Patrick Lambe TBC London October 2016
Design = evidence + desired outcomes

Understand the information resources – content warrant

Understand the users and their key tasks – user warrant

Understand if information needs to be exchanged with other agencies in standard forms – standards warrant

Warrant – the evidence behind your design
Design = evidence + desired outcomes

Understand the information resources – **content warrant**

Understand the users and their key tasks – **user warrant**

Understand if information needs to be exchanged with other agencies in standard forms – **standards warrant**

Warrant – the evidence behind your design

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Ungoverned ◆ Stashes ◆ Baggage ◆ Acontextual
Knowledge Mapping: Property Development Company
Small teams map their activities and knowledge assets
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Small teams map their activities and knowledge assets
Assets are analyzed for knowledge risks, gaps, accessibility improvements
Assets are analyzed for knowledge risks, gaps, accessibility improvements
Teams use the analytics to build knowledge management plan: defines taxonomy purpose
Activity and Asset descriptions are exported into facets into a TMS
Maps provide candidate terms for facets.
The Taxonomy purpose is defined by the KM strategy
We analyze the knowledge flows to identify highly sharable knowledge assets
The Taxonomy is modeled and refined with other content, standards and user warrant
Knowledge Maps generate use cases to test the Taxonomy
1. Knowledge Management Strategy - Focus

2. Highlights the highly sharable knowledge assets

3. Contemporaneous language of work and knowledge used / produced in work

4. Generates use cases for the taxonomy

Provides business purpose and desired outcomes for Taxonomy

Taxonomy Tests against purpose and user needs

Provides focus for Taxonomy

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Facets from knowledge maps: Property Development

Business activities

Document types

Entities

Event Types

Expertise areas**

Development types

Industries

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Content Modeling: Islamic Finance
Educational Institution

INCEIF
THE GLOBAL UNIVERSITY OF ISLAMIC FINANCE
www.inceif.org

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Use case scenarios

### Name of User Group/ User Type:
Faculty (Assoc Prof Dr xxxxx)

### Main Activity of User Group:
Faculty member (as trainer)

### Task (short label):
1. Training
2. How To Become a Leader? Transformation from Manager to Leader

### Why Important:
When/Frequency:
- Approximately 6 per year

### Objective of Task:
To conduct a Corporate Training

### Steps (information-related steps):
1. University/organisation organizing the training session will approach the faculty members and enquire their availability.
2. Topic of the training session is provided.
3. The faculty members usually attached themselves as an apprentice at first, and gradually grow into facilitator role.
4. Plan and conduct for training session.
5. Prepare the presentation slides.
6. Conduct research and understand the audience and their participation.

### Information/Knowledge Resources Needed:

#### Internal Sources
- Based on previous research and presentation slides.

#### External Sources
- World Bank
- Academic - UPM
- Database online
  - Elsevier
  - Emerald
- Enerdata Search
  - [www.enerdata.net](http://www.enerdata.net)
- Research Gate
  - [www.researchgate.net](http://www.researchgate.net)
- Google Scholars
  - [www.scholar.google.com](http://www.scholar.google.com)
- Meeting with Experts
- Research Group: ‘Jom Social Group’
- UPM Library

### Links to/ Followed by other Tasks/ Activities?

- Walk through the task
- Identify information sources
- Identify “next task”
- Use materials to collect vocabularies

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## Use case scenarios

**Name of User Group/ User Type:**
Faculty member (Assoc Dr yyyy)

**Main Activity of User Group:**
Publication – Funded Research

**Task (short label):**

<table>
<thead>
<tr>
<th>Why Important</th>
<th>When/Frequency:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Annually (once a year)</td>
</tr>
</tbody>
</table>

**Objective of Task:**
To publish funded research articles

**Steps (information-related steps):**

1. Funded research is awarded by institution
2. Dr aaaa (CRP) will announce regarding who will collaborate for the Funded Research.
3. Select research topic within scope of funding
4. Submit final draft for review to Dr bbbb, Dato cccc, Dr bbbb, Prof ffff through Email and Hardcopy.

**Information/Knowledge Resources Needed:**

**Internal Sources**
- KMC Portal [kmportal.inceif.org](http://kmportal.inceif.org)
- Journal Database Emerald, Zawya, Elsevier, Thomson Reuters
- Physical books in KMC - Waqf books
- Publisher Listing - List from CRP

**External Sources**
- Reputable publishers - Pearson - Palgrave-Macmillan - Oxford
- Academic Website - UIA website
- Organisation Website - IRTI, IDB,

**Links to/Followed by other Tasks/Activities?**
Quality research will be published in a book. Need to identify publisher and write book proposal.
Collectively, a diverse and representative range of use case scenarios produce a composite picture of

- User warrant
- Content warrant
- Standards warrant
Content model (high level): Islamic Finance Taxonomy
Expert

Name

Title

Designation

Education/Qualification

Field of Expertise

Institution

Events

Taught Courses

Publication

Working experiences

Contact information

- Professional membership
  - Committee
  - Association

- Head of Department
- Lecturer
- Dean
- Associate Dean

- Examples: Adjunct Professor, Professor, Associate Professor, Datuk, Dr.

- PhD
- Masters
  (include higher learning institution)

- Islam
- Fiqh Muamalat
- Islamic finance
- Islamic Capital Markets
- etc

- Report
- Case study
- Scholarly publication
- Book

- Academic
- Industry

- E-mail
- Telephone number (office
- Web address
- LinkedIn
- Research gate

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Facets from content models: Islamic Finance Taxonomy

Document types

Event Types

Islamic Finance Topics

Institution Types

Islamic Finance Products

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# Knowledge maps vs content models?

<table>
<thead>
<tr>
<th>Knowledge maps</th>
<th>Content models</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comprehensive</td>
<td>Targeted</td>
</tr>
<tr>
<td>Activities-oriented</td>
<td>Scenario-based</td>
</tr>
<tr>
<td>Pick up explicit AND tacit knowledge needs (skills, experience, relationships)</td>
<td>Focus on explicit knowledge</td>
</tr>
<tr>
<td>Good for user, content and standards warrant</td>
<td>Good for user, content and standards warrant</td>
</tr>
<tr>
<td>Provides wide range of scenarios for user testing</td>
<td>Provides limited range of scenarios for testing</td>
</tr>
<tr>
<td>Can discover unexpected things</td>
<td>Tend to learn most about what you are looking for</td>
</tr>
<tr>
<td>Needs extension to get other metadata requirements</td>
<td>Gives more rounded picture of metadata requirements</td>
</tr>
</tbody>
</table>

- Taxonomy is to serve a KM strategy
- Taxonomy largely covers internal needs and resources
- Organisation willing to invest effort

- Taxonomy focused on content management
- Taxonomy extends to resources wider than the enterprise
- Limited resources and focus, or too complex an organisational environment to map
Two strategies for taxonomy development

- **Knowledge mapping**
  - Determine taxonomy purpose, focus, scope
  - Create and validate maps (workshops)
  - Extract user, content, standards warrant
  - Identify key users
  - Develop use case scenarios (interviews)
  - Extract user, content, standards warrant
  - Model ecosystem and content types

- **Content Modeling**
  - Design and test

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Thank You!

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