
Information Architecture

Taxonomy

Work Plan

Excerpts

(Redacted to protect confidentiality)

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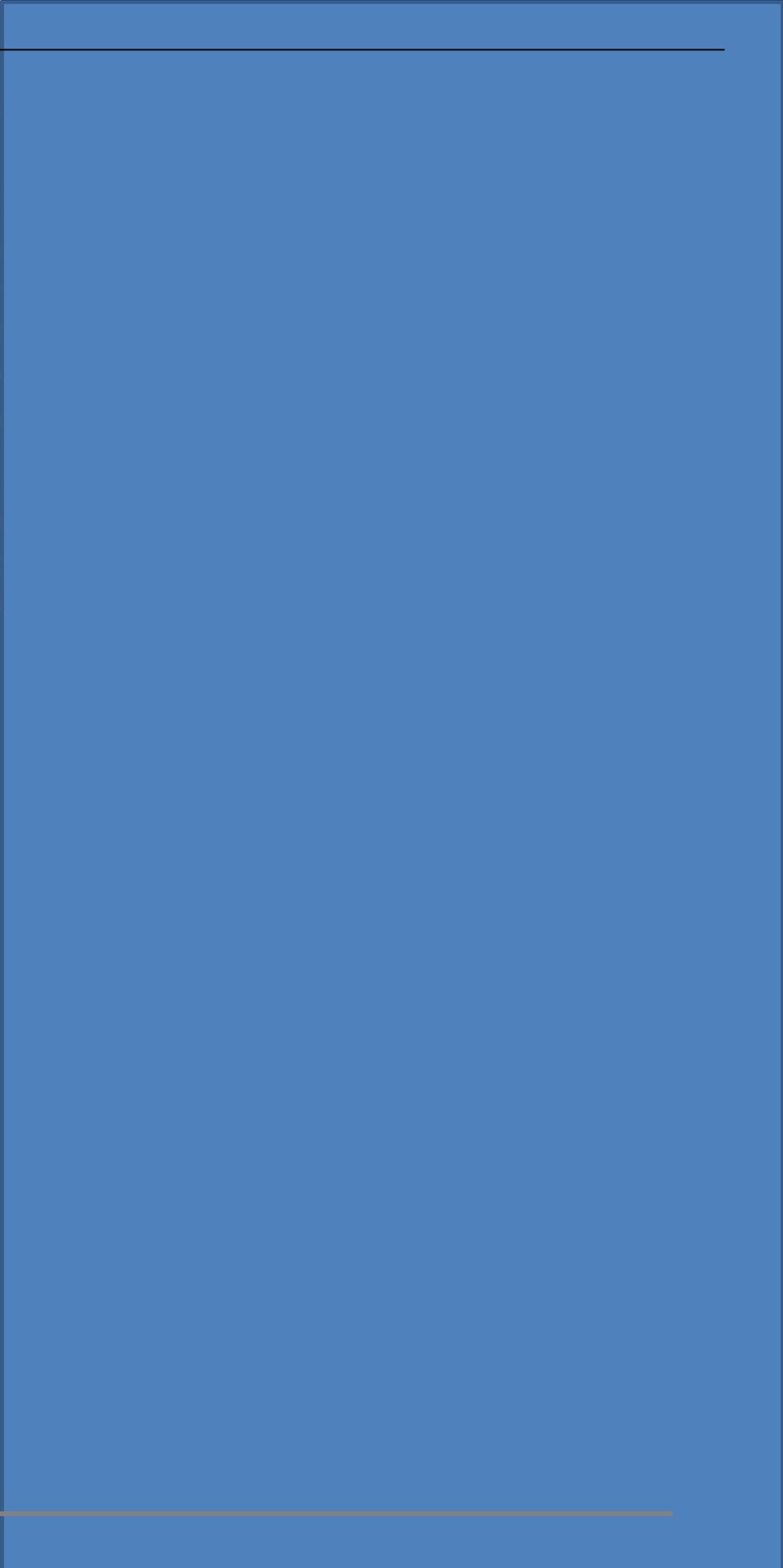
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1. Definitions, Acronyms

Item	
Content	Tex Co Do
Content Management System(s)	In Liv
Controlled Vocabularies	Est and
ECM (Enterprise Content Management)	Ent and
Facets	Mu wa
IA (Information Architecture)	A d
	See
Metadata	The tag aut
	Me
	<ul style="list-style-type: none">•••
Artifact Lifecycle management	Als be loc

Item	
Taxonomy	A hiera "Taxon Taxono <ul style="list-style-type: none">• Ca• Hi• Do
Taxonomy Management Application (TMA)	A softw taxono
Thesaurus	Termin
Validated Artifacts	These a
COTS	Comme
PoC	Proof o



2. Introduction

Project Description: ABC
Taxonomy project.

The ECM Taxonomy proje
work includes activities in
of the three Content Man

Project Objectives:

- **The AS-IS State:**
systems, so that
- **The TO-BE state:**
to transact that b
 - Standardize
 - Define and s
 - Enable the o
 - Support acce
 - Facilitate cor
- Provide key Ente
inputs to enterpr

3. Problem Statement

The users of con
problems:

- Difficult
- Inefficie
- No ente
- Inconsis
- Insuffic
- Out of o
- Retenti

several key



4. Executive Summary

The Enterprise Taxo

IS" state of ABC's tax
productivity & reduc

The recommendatio
discovery & definitio
recommendation of

XYZ is a global IT out
over 140,000 associa
customer satisfactio
more than 23,000+ c
solutions to top Hea



5. Scope of Services

XYZ will provide the following services:

Organization S

- Includ

Content Mana

- Micro
- Open
- Docur

Content In Sco

in the “in scop
Non-validated

media assets which are created or stored
d Artifacts in LiveLink and Documentum.

Step 1: Define

- Discov
- Collec
- Gather
- Create

veys, interviews and workshops

the project.

ly in use and perform harmonization

ment.

Step 2: Define

- Create
- Create
- Review
- Recon

odel for the content management

Step 3: Taxon

and Recommendation:

- Identif
- Create
- Evalua
- Make

s.

criteria.

Additional Not

- Stake
- Ven
stre
- By a
resu

6. Service

The following ad

- Imp
- Ana
- Ana
- Cre
reco
- Use
- Any
- Wo
- PoC

7. Terms

The term of this
services, unless
specified in this
complete. Com
reasonable effo

and shall expire upon completion of the
ement. It is expected that the Services
, and approximately take 6 months to
ther factors, XYZ will make commercially

8. Assumptions

This table describes the assumptions XYZ is making for completion of this engagement. Any delay caused by deviation from these assumptions may impact the scope, project timelines and cost of the engagement.

No.	Assumption
1	ABC's guidelines, provided to XYZ in
2	This engagement America and Euro for interviews. The review/validate th
3	Any delay in proje will be handled th
4	XYZ will be provid that will help in su
5	Business and IT te deliverables withi
6	Any changes to th scope change pro
7	Activities are desi
8	XYZ will take prim
9	Total data volum
10	XYZ will adopt a s
11	XYZ will perform e recommendations

9. Dependencies

The table below indicates the general dependencies for completing this engagement. Any delay caused by these items may impact the scope, project timelines and cost of the engagement. Any delay in project timelines caused by factors outside of XYZ control will be handled through the scope change process.

No.	Dependency Item	Expected Date
1	Availability analysis &	ngoing
2	Availability	Start+4 weeks
3	Signoff of	ngoing
4	Office faci	t Start te
5	User-ids, p	t Start te
6	Identify & Management	Start + weeks

10. Roles and Responsibilities

Organization	Role	Responsibility
XYZ	Onsite Enterprise Consultant (ECM Strategist)	<ul style="list-style-type: none"> • Prim • ABC • Plan • revi • Doc • Ana • Deli • Rep • Con • Mar • Ens • proj • Atte

Organization

Role

Responsibility

XYZ

Onsite
Information
Architect

- Drive
- defi
- Part
- of th
- Perf
- Res
- cycl

XYZ

Onsite
Business
Analyst

- Res
- stak
- part
- Assists th
- content
- Respons
- coordina

XYZ

Onsite
ECM/WCM
Analyst

- Conduct
- with con
- Assists w
- Analysis

XYZ

Offshore
Lead Analyst

- Respons
- Creates v
- Tracks sc
- Assists th
- informat

XYZ

Offshore
Business
Analyst

- Assists o

11. Service Location

The Onsite Services will be provided from the following location: ABC offices in Berkeley Heights, NJ. Offsite services will be performed at locations of XYZ's choosing.

Interviews for stakeholders outside of New Jersey will be conducted remotely by multiple methods.

Deliverables and Activities

The following table defines the detailed phases, activities, deliverables and responsibilities for the project.

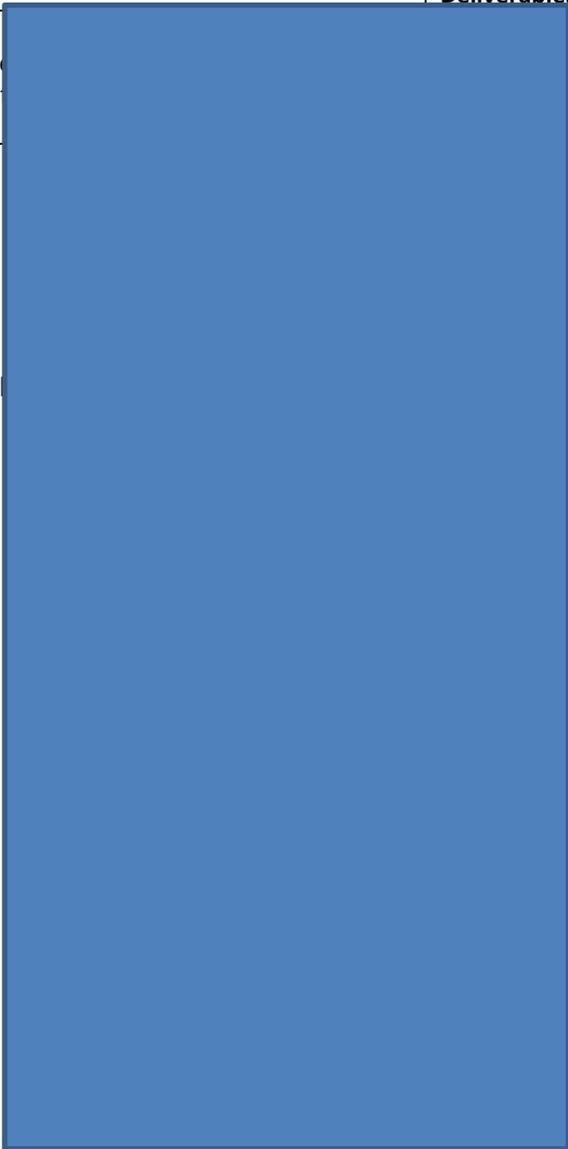
Phase	Activity	Deliverables
Project Initiation	<ul style="list-style-type: none"> • Kickoff meeting • Identify stakeholders • Confirm roles • Confirm deliverables • Schedule 	<ul style="list-style-type: none"> Charter Plan
The AS-IS State: Discovery and Knowledge Transfer	<ul style="list-style-type: none"> • Collect and analyze relevant data • Create a data map • Conduct interviews • Interview stakeholders • Analyze data • Analyze requirements 	<ul style="list-style-type: none"> Inventory Summaries Inventory Requirements Inventory
The TO-BE State: Definition and Design	<ul style="list-style-type: none"> • Statistical analysis • Build initial data relationships • Build initial data models • Define data architecture • Harmonize data 	<ul style="list-style-type: none"> Inventory Taxonomy Inventory Analysis Inventory Report Inventory Metadata Inventory Framework Inventory Content Inventory Definition
Review, Reconcile and Present	<ul style="list-style-type: none"> • Core team validation • Work with stakeholders for approval • Present findings and recommendations • Present review and feedback • Present final report 	<ul style="list-style-type: none"> Inventory Taxonomy Inventory Framework Inventory Lifecycle Inventory

Phase	Activity	Deliverables
Taxonomy Management Application (TMA) Evaluation	<ul style="list-style-type: none">IdentifyEvaluate on best	Evaluation Criteria Evaluation & Recommendation Report

12. Timeline

Proposed timelines and major tasks for t

SEE EXAMPLE



13. Resources and Pricing

XYZ will provide the Services and Deliverables described herein beginning March 1, 2013, or as mutually agreed. This SOW is on a fixed price basis. Changes to the services and deliverables defined herein will be subject to the Scope Change process, as defined below.

Travel related expenses associated with this engagement for travel from offsite to onsite, or other travel (at the request of ABC, if any) will be charged to ABC on actuals.

The total cost for this engagement is as follows:

Item	Amount
Service Fees for Information Architecture Project, inclusive of the fees to evaluate up to 3 Taxonomy Management Application products & make a recommendation	\$ NNN,NNN

Pricing Assumptions:

- Travel prior to
- Local t
- Durati
- Expen requir



14. Milestone Based Pricing

The following payment schedule defines how payments are structured based on successful outcomes and deliverables.

Milestone	Completion Date	% of Service Fees	Amount (\$)
Initiation Complete, Kickoff Meeting	Week 2	10%	\$NNN
AS-IS Analysis Complete, Checkpoint Meeting #1	Week 12	30%	\$NNN
TO-BE Design Complete, Checkpoint Meeting #2	Week 17	30%	\$NNN
Final Presentation & TMA Recommendation	Week 18	30%	\$NNN
		100%	

15. Risks and Mitigation

The risks to the project are described in the table below. This list is not all-inclusive and other risks may be identified prior to the Work Order sign off. The table describes risks from both ABC's and XYZ's perspectives.

Risks	Mitigation
Delay in getting the requirements from the SMEs and Stakeholders.	ABC to ensure availability and involvement of SMEs during the requirement gathering phase.
Statistical sampling will be used to analyze the large amount of data. It is possible that some key words or metadata will be missed.	Key words and metadata evolve over time. Part of the project's goals includes a framework for managing these changes.

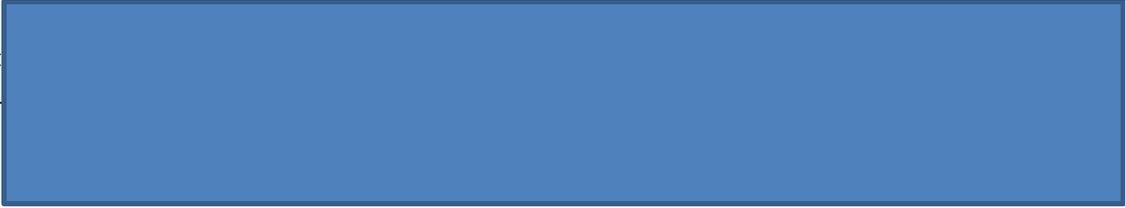
16. Change in Scope

If, after the additional work that needs to be done, additional work



17. Software and/or Equipment

Unless ot
services h
software



18. Signature Page