



Reduce Your Taxonomy Deployment Time from Months to Weeks

Steve Mann

Vice President of Sales

Concept Searching

stevem@conceptsearching.com

Mark Leher

Chief Operating Officer

WAND

mleher@wandinc.com

www.conceptsearching.com

marketing@conceptsearching.com

Twitter [@conceptsearch](https://twitter.com/conceptsearch)





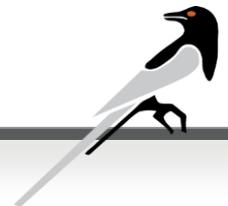
Steve Mann – Vice President of Sales at Concept Searching has proven expertise in consulting, solutions delivery, sales, and project management in business-to-business environments. He is experienced in Microsoft technologies, including SharePoint, and in providing guidance on best practices, technical advice, and solutions to address a wide range of business challenges, leveraging a combination of Microsoft and third party technology.



Mark Leher – Chief Operating Officer at WAND is an expert on taxonomies and how to use them to improve findability of information assets. For over a decade, he has worked with companies of all sizes in building taxonomies, developing taxonomy strategy, and applying taxonomies to information assets. Mark is the creator of the WAND General Business Taxonomy which has been downloaded by more than 6000 businesses for use in the SharePoint 2010 term store.



- Welcome
 - Who we are
 - What we do
- Manual tagging – the impact
- Taxonomies – why we need them
- Our joint offering
- Demonstration
 - How to customize the WAND HR taxonomy using Concept Searching's technologies
- Questions

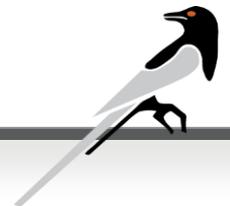


- Based in Denver, CO
- Building taxonomies since 1983
- World's leading provider of pre-built taxonomies
- Taxonomy Professional Services
- Client base includes online yellow pages, online advertising engines, enterprise search, e-commerce, and SharePoint customers
 - SMBs to Fortune 500



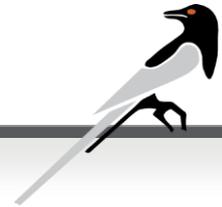
WAND Taxonomies Available

- Products
- Services
- Manufacturing
- Insurance
- Banking and Finance
- Skills
- Legal
- IT Departments
- Records Retention
- Sentiment
- Food Science
- Project Management
- Higher Education
- Agriculture
- Food and Beverage
- Building and Construction
- Raw Materials
- Equipment
- Automotive
- Mining
- Oil and Gas
- Medical Conditions
- Chemicals
- Science and Technology
- Real Estate
- Many others!



The Global Leader in Managed Metadata Solutions

- Company founded in 2002
 - Product launched in 2003
 - Focus on management of structured and unstructured information
 - Profitable, debt free
- Technology Platform
 - Delivered as a web service
 - Automatic concept identification, content tagging, auto-classification, taxonomy management
 - Only statistical vendor that can extract conceptual metadata
- 9 years KMWorld '100 Companies that Matter in Knowledge Management'
7 years KMWorld 'Trend Setting Product'
- Authority to Operate enterprise wide US Air Force, NETCON US Army, and Canadian SLSA
- Locations: US, UK, and South Africa
- Client base: Fortune 500/1000 organizations
- Microsoft Gold Certification in Application Development, Microsoft Business-Critical SharePoint program partner
- Smart Content Framework™ for Information Governance comprising
 - conceptClassifier for SharePoint and conceptClassifier for Office 365
 - Concept Searching Technology Platform and conceptClassifier Platform
 - Add on – conceptTaxonomyWorkflow and conceptClassifier for OneDrive for Business



What Do We Do?

Concept Searching's technology platforms deliver semantic metadata generation, auto-classification and taxonomy management, and taxonomy workflow

The platform is based on an open architecture with all APIs based on XML and Web Services. It integrates with content repositories, search engines and file shares, enabling our clients to add structure and manage their enterprise content, regardless of environment

The resulting classification metadata is used by clients to deliver 'intelligent metadata solutions' in areas such as enhanced search, migration, data privacy, records management, policy enforcement, compliance, text analytics, and business and social collaboration



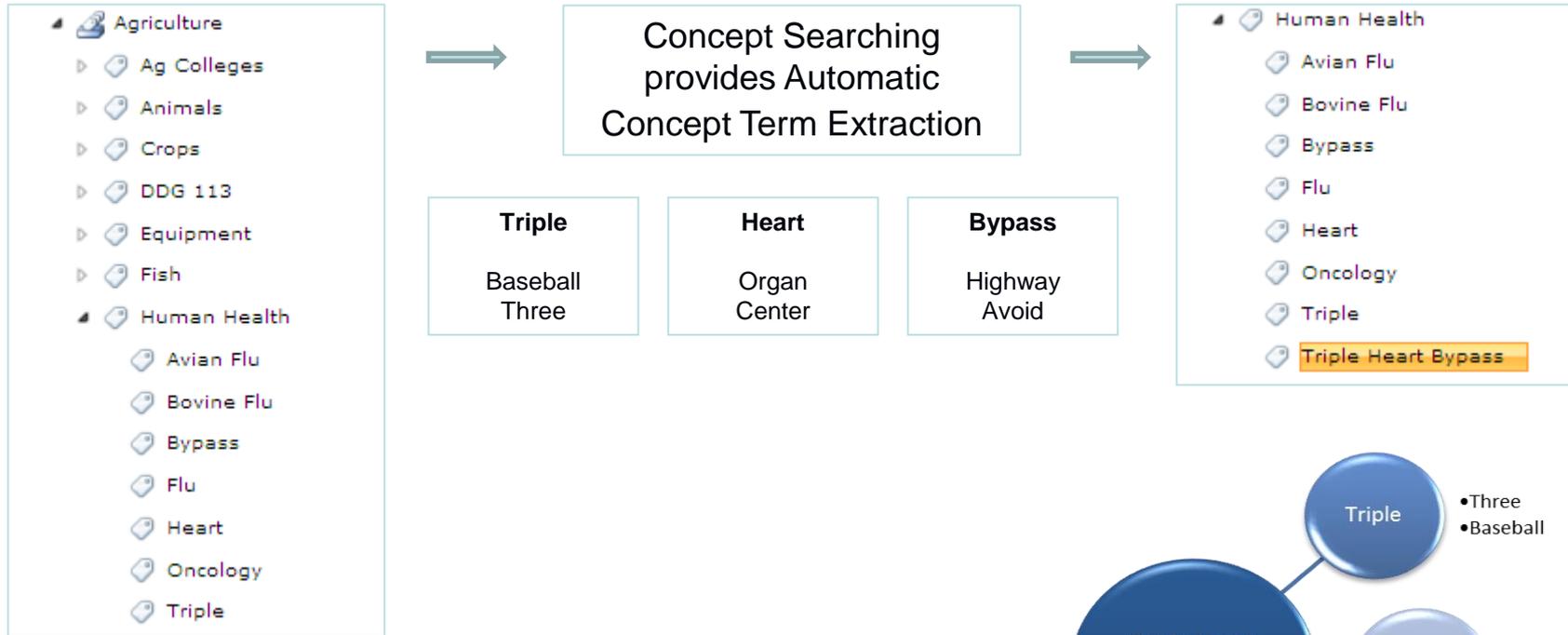
93% of Organizations use Manual Tagging. Does Yours?

A manual metadata approach will fail 95%+ of the time

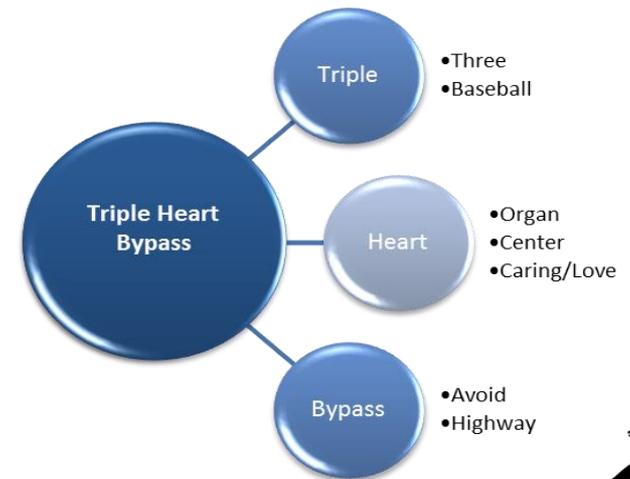
Issue	Organizational Impact
Inconsistent	Less than 50% of content is correctly indexed, meta-tagged or efficiently searchable rendering it unusable to the organization (<i>IDC</i>)
Subjective	Highly trained information specialists will agree on meta tags between 33%-50% of the time (<i>C. Cleverdon</i>)
Cumbersome – expensive	Average cost of manually tagging one item runs from \$4-\$7 per document and does not factor in the accuracy of the meta tags nor the repercussions from mistagged content (<i>Hoovers</i>)
Malicious compliance	End users select first value in list (<i>Perspectives on Metadata, Sarah Courier</i>)
No perceived value for end user	What's in it for me? End user creates document, does not see value for organization nor risks associated with litigation and non-conformance to policies
What you have seen	Metadata will continue to be a problem due to inconsistent human behavior



How Do We Differ from Our Competitors?



- Remains unique in the industry
 - Ability to identify and correctly weight multi-word concepts in unstructured text



How Do Metadata Generation and Auto-classification Impact Business?

Search



Content Management



Records Management



How Do Metadata Generation and Auto-classification Impact Business?

Data Privacy and Security



eDiscovery, Litigation Support, and FOIA

Migration



Information Governance





Information Governance

The Formula for Success? Metadata + Auto-classification + Taxonomy



Why WAND and Concept Searching?

Concept Searching

- Automatic semantic metadata generation
- Auto-classification from any repository, any time, any where
- Interactive taxonomy management tools

WAND

- Comprehensive horizontal and vertical subject areas
- Add-on areas as business changes
- Load and go



- * designed for Subject Matter Experts * reduces development time *
- * eliminates end user tagging * enables concept based searching *
- * on-premises, cloud, hybrid * no special IT expertise to install *
- * adapted to your organization * platform agnostic *
- * reduced ongoing management *



See How It Works



Questions?





Thank You

Steve Mann
Vice President of Sales
Concept Searching

stevem@conceptsearching.com

Mark Leher
Chief Operating Officer
WAND

mleher@wandinc.com

www.conceptsearching.com
marketing@conceptsearching.com
Twitter [@conceptsearch](https://twitter.com/conceptsearch)



Appendix: Case Studies



Case Study – Waikato Institute of Technology (Wintec)

Situation:

- One of New Zealand’s largest Institutes of Technology/Polytechnics
- Helps drive the development of skilled workforces, not only in New Zealand, but globally

Challenge:

- A longtime user of SharePoint, wanted to migrate content to the cloud environment
- Needed to simplify access to information for a variety of stakeholders, and make sure that information was as accessible and as usable as possible

Solution:

- concept**Classifier** for SharePoint Platform
- concept**Classifier** for Office 365 Platform
- concept**TaxonomyWorkflow**

Benefits:

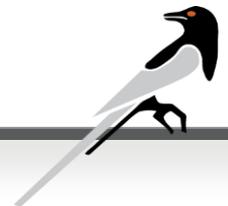
- Accuracy of search
- Compliance and governance
- Cost savings
- Ease of access to information
- Improved collaboration



“As an education provider, collaboration is key. In the past we depended on siloed information systems and tasks. But with the Office 365 cloud solution from Concept Searching, we are able to automate business-critical processes, expand to other geographies, and significantly reduce our annual infrastructure and support costs.”

Brad Vines, Director of Information Technology, Wintec

[Read the Case Study](#)



Case Study – Nottinghamshire County Council

Situation:

- UK's 9th largest council
- 18,000 staff, including 6,500 PC users
- Significant number and diversity of information assets that support the delivery of over 300 discrete services



Challenge:

- Good information management policies were in place, but no consistent policy adoption
- Manual tagging was used – onerous, circumvented, and inconsistent
- Reduction in staff numbers meant content owners were leaving behind a legacy of unmanaged, unsearchable content

“Now we take the content the council employees create and make it findable, rather than relying on the users to make it findable.”

Lesley Holmes, Information Manager,
Nottinghamshire County Council

Solution:

- conceptSearch, conceptTaxonomyManager, conceptClassifier for SharePoint, and conceptTaxonomyWorkflow
- eDiscovery solution

Benefits:

- Search accuracy and relevant results
- Better Information for decision making – can see the whole picture
- Retention rules and guidance
- Improved eDiscovery and legal compliance



Case Study – Moffitt Cancer Center

Situation:

- Not-for-profit organization that contributes to the prevention and cure of cancer
- More than 30,000 users
- Outpatient treatment programs that record more than 328,300 visits a year

Challenge:

- Portal to enable patients to access information relevant to their specific health situations
- Accurate, medically sound, and secure information necessary

Solution:

- conceptClassifier, conceptTaxonomyManager, Microsoft FAST Search
- Integrated self-serve portal solution with partner Aeturnum

Benefits:

- Accuracy of search
- Relevance of results
- Confidence in data
- Control and trust



“With more than 30,000 current users, the MyMoffitt Patient Portal has seen significant growth, and of the new patients that come to Moffitt, 87% register for a patient portal account. All developments and enhancements are about improving the patient experience.”

Jennifer Camps, Director of Portal Technologies and Data Management,
Moffitt Cancer Center

[Read the Case Study](#)



Case Study – AllRegs by Ellie Mae

Situation:

- Leading electronic publisher of underwriting and loan product guidelines for the mortgage industry
- Offers hundreds of thousands of documents to mortgage professionals

Challenge:

- Expansion of search functionality within its mortgage lending content library
- Time and resource constraints on content tagging

Solution:

- conceptClassifier for SharePoint
- Elimination of end user tagging and inconsistencies, using compound term processing

Benefits:

- Ease of use
- Rapid deployment
- Increased search and findability accuracy
- Enhanced customer experience



“The integration of conceptClassifier with our AllRegs Online application will enhance our customers’ user experience as they conduct research for their mortgage compliance, underwriting and investor business needs.”

Jeffrey Hoerster, President and COO,
AllRegs by Ellie Mae



Case Study – Brailsford & Dunlavey

Situation:

- Program management firm with comprehensive in-house planning capabilities
- Highly mobile workforce across several national offices

Challenge:

- With 70,000 documents and 8,000 list items on its intranet, and another 200,000 on its client portal, intranet content needed to be significantly more accessible to employees

Solution:

- conceptClassifier for SharePoint
- Enhanced intranet portal and aligned information governance policies

Benefits:

- Improved findability
- More effective management of knowledge assets
- Elimination of duplicate content
- Enterprise wide metadata repository



BRAILSFORD & DUNLAVEY

Brailsford & Dunlavey selected conceptClassifier for SharePoint, based on its ability to achieve great time savings refining their disparate data stores and streamlining their critical path document processes.



Case Study – Automatic Tagging, Policy, and Governance

Situation:

- Budget of \$6.9 Billion
- Over 60,000 users
- Runs 75 hospitals and clinics providing care to more than 2.6 million beneficiaries

Challenge:

- Data Privacy
- Intelligent Migration
 - Before and after
- Records Management
 - 72,000 Site Collections, 5,300 retention codes, classify 200,000 documents per hour with minimum resources (Proof of Concept)

Solution:

- conceptClassifier for SharePoint platform

Benefits:

- Automatic tagging based on organizational vocabulary and descriptors
- Automatic routing and the ability to change the SharePoint content type
- Eliminated manual tagging, removes from unauthorized access and portability
- No security exposures or breaches in 5 years, since deployed



The US Air Force deployed the technologies to implement data privacy protection processes and after five years has not had a data breach

[Read the Case Study](#)



Case Study – Records Management

Situation:

- UK County Council
- Serves approximately 1M citizens

Challenge:

- Management of digital records
- Reduction in paper records
- Reduce physical and digital storage

Solution:

- conceptClassifier for SharePoint platform
- SharePoint Search
- SharePoint Records Management
- Managed Metadata Services

Benefits:

- Migration of thousands of documents from File Shares to SharePoint to deliver and integrated view of all information based on pre-defined taxonomy
- Cleanse content existing in multiple repositories
- Real time identification and classification from all sources of ingestion (fax, scanned, email, etc.) as well as from all semi-structured and unstructured content
- Improved search to quickly identify value of document/record in 'plain English'



*“One way to manage records
whatever their medium”*



Case Study – eDiscovery, Litigation Support, FOIA

Situation:

- Legal Department

Challenge:

- Reduce costs associated with litigation support
- Overabundance of content - much was not tagged
- Increase relevance in finding appropriate information

Solution:

- conceptClassifier for SharePoint

Benefits:

- Vocabulary normalization
- Enables 'concept based' searching and eliminated the construction of complex queries
- Removes the ambiguity in content
- Enables the identification of new information to be captured and identified early in the discovery process and immediately made available to the discovery team
- Eliminates manual tagging unless authorized



OppenheimerFunds®
The Right Way to Invest



RMDA
Records Management and Declassification Agency

“The RMDA can now load terabytes of records per day and automatically classify these against multiple taxonomies simultaneously, while having the ability to easily expand the system configuration through its modular and scalable architecture.”

*Juan Celaya, President
COMPU-DATA International, LLC*

[Read the Case Study](#)



Case Study – Social Tagging and Collaboration

Situation:

- 8,000 registered users
- 800 virtual workspaces and communities of practice
- Share and disseminate mission critical information and technical excellence
- Collaboration

Challenge:

- Poor search results
- No collaboration capabilities
- Lack of security and control of content assets for each end user
- No robust knowledge management capabilities (wikis, blogs, collaboration, poor search, etc.)

Solution:

- Partner Triune Group provided the knowledge management and collaboration platform
- conceptSearch embedded into the solution

Benefits:

- Accuracy of search and relevant results
- Confidence in data
- Increase in quality of decision making



“With the integration of the Concept Searching intelligent search capability, Triune Group was able to provide us with a robust and scalable collaboration tool that delivers not only powerful advanced searching capabilities, but also a controlled and secure environment.”

Brian Follen

NASA Safety Center (NSC)
KnowledgeNow Program Manager

Client received KMWorld ‘Reality Award Winner’ for successful deployment and recognition for a superior Knowledge Management Solution

[Read the Case Study](#)



Case Study – Intelligent Migration

Situation:

- Multiple Clients

Challenge:

- Simply moving content to new location did not provide any benefits
- Human error and time was too costly
- Quantity of content too great

Solution:

- conceptClassifier for SharePoint platform

Benefits:

- Cleanses irrelevant and unnecessary documents
- Dramatically reduces the time for migration
 - Eliminates manual intervention
- Improves the outcome enabling improvements in:
 - Search
 - Records management
 - Data privacy
 - eDiscovery and litigation support
 - Text analytics



BRAILSFORD & DUNLAVEY

conceptClassifier for SharePoint identified 66,000 duplicates out of a total of 270,000 documents, representing a 24% reduction in disk space.



The goal was to improve search for 147,000 business users but needed to migrate literally millions of documents.

conceptClassifier for SharePoint was used for the pre and post migration and for enabling concept based searching with their existing search engine and taxonomy based search after the migration.

