

The Organisational Politics of Taxonomies

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ABSTRACT

Taxonomists, system developers and the general information management profession often need to consider the structural principles and design factors that impact organisational taxonomy projects. We suggest that often-overlooked organisational politics can have a significant impact on the structure, content and eventual usability of a taxonomy.

Navigating and managing the maze of cultures, behaviours, and attitudes of individuals and groups within organisations can be daunting for anyone. Taxonomists are not necessarily skilled in psychology or focused on organisational behaviour, but they are regularly faced with political situations. They need be aware that these powerful political forces are just as important as any technical issues.

This paper aims to assist the taxonomist with this process and add to the body of knowledge on the topic. Theories, case studies and key stakeholders influencing taxonomy projects are discussed, together with the common challenges that can be caused by political power games or resistance. Strategies and tactics to address them are included, where possible.

1. INTRODUCTION

We have been involved in the development of taxonomies for the structure and management of business information for many years and many organisations. This paper is based on our joint experiences in this field, together with a literature review to identify the existence and content of other papers on this specific topic.

We, along with possibly other taxonomists, often consider the appropriateness of these tools in practical organisational settings and whether there are other factors impacting on the success of taxonomy development and adoption. While a number of reasons for success or failure are discussed within our professional communities of practice, we suggest that human factors can be one of the most significant determinants.

The subjective nature of information categorisation appears to be so inextricably linked to basic human nature, it suggests that more practical approaches are needed within organisational settings. This includes drawing on ideas that may be outside the information management profession.

Information is so readily created and available, it can be regarded even more now as a commodity of end users, to be arranged and managed as they see fit. Some may wonder whether we need to worry about taxonomies and their place in organising knowledge.

With these issues in mind, this paper investigates the impact of organisational politics on taxonomy development and acceptance. Using case studies from our work projects, the paper identifies political and organisational challenges and suggests solutions to address such challenges.

2. DEFINITIONS AND RATIONALE

Taxonomies

Our paper concerns taxonomies intended for the organisation of business information, which is the information created or received as a result of an organisation carrying out its day-to-day business and operations.

Somewhat ironically in a paper discussing differences of opinion, the use of the term 'taxonomy' in the information management context has been the subject of debate, and many alternative concepts exist. Some may prefer business classification scheme, file plan, information structure, and even thesaurus.

Although not critical to the issues central to this paper, Gilchrist provided insight into such etymological confusion. Gilchrist (2003) stated that from his research, the term *taxonomy* "was being used with at least five separate meanings", albeit with some overlap.

Working within organisations, where we often need to rationalise and simplify the explanation of information management concepts for end users, there is often a legitimate need to apply multiple meanings or use the term generically. However, in the majority of cases, we are attempting to design hierarchical structures with meaningful labels that will facilitate the arrangement, browsing and contextual retrieval of information such as corporate records. To this end, our use of *taxonomy* appears to agree with Gilchrist's (2001) identified corporate uses of the term, including the recognition of "structure (classification) and labelling (thesaurus) as contributory components".

An example of a simplified definition of *taxonomy* is provided by Lambe (2007, p.4) - "the rules or conventions of order or arrangement." For the purpose of this paper, a business information taxonomy can therefore be broadly defined in general terms as - *the rules or conventions of order or arrangement for an organisation's business information.*

Politics

There are numerous definitions of *politics*. Similarly, there are various definitions of *organisational politics*.

Sidhu et al (2011, p12) saw it as:

"...the rivalry between competing interest groups or individuals for power, authority and leadership. The means often used include: influence attempts, power tactics, informal behaviour, and concealing one's motives. This can result in: self-serving behaviour, acting against the interests of the company, securing valuable resources, and attaining power."

Mitchell (2005, p.1) identified others such as Pfeffer and Dubrin, who also refer to power and self-interest. However, he also provided a more positive view as advocated by Aristotle; namely that politics is a:

"means of reconciling the need for unity and creating order out of diversity"

Mitchel also claimed that politics could be characterised as "sophisticated forms of gamesmanship" that "occurs on an ongoing basis, often in a way that is invisible to all but those directly involved". Furthermore, that:

"Organizational politics are a natural result of the fact that people think differently and want to act differently. This diversity creates a tension that must be resolved through political means."

Why Manage Politics in Taxonomy Projects?

It is generally agreed by organisational theorists and practitioners that political behaviour is part of organisational life and "political ability is a fundamental component of success" in achieving goals, getting things done, acquiring resources, influencing and successfully completing projects (McIntyre, 2005).

According to Pinto (2000), projects and other change initiatives are fraught with politics; their success and the changes they aim to achieve are influenced by those politics. As we will discuss later, many project managers may not have the power base as one would find with other positions embedded in hierarchical organisational structures. Thus they are left with the need to influence to achieve objectives and manage behaviours without the benefit of any formal authority bestowed upon them by the organisation.

Davenport et al (1992, p1) took the need to manage politics a step further and suggested a direct link between the success of a knowledge project and the effective management of the politics:

“Many ...efforts to create information-based organizations — or even to implement significant information management initiatives — have failed or are on the path to failure. The primary reason is that the companies did not manage the politics of information. Either the initiative was inappropriate for the firm’s overall political culture, or politics were treated as peripheral rather than integral to the initiative. Only when information politics are viewed as a natural aspect of organizational life and consciously managed will true information-based organizations emerge.”

The taxonomist must be skilled in building an awareness of political behaviour and equally how to manage and navigate it. While skillfully managing politics should lead to project success, ignoring it can result in unwanted consequences. This may include demotivated teams, project delays, wasted funds, unhappy and unproductive users and an unhappy sponsor who withdraws his or her support. Taxonomists ignore this at their peril.

3. LITERATURE REVIEW

To determine whether others had investigated and written specifically on this topic, we undertook searches into articles using the keywords (and relevant combinations) of “taxonomy”, “classification schemes”, “organisational politics”, “organisational culture”, “user resistance”, etc. Very little was found that was specific to taxonomy development and organisational culture/politics, although a number of articles included reference to this issue.

The lack of literature was also found by Alexander (2014, p7):

“...(the) theory of taxonomy construction in business organisations is underdeveloped.”

Alexander specifically addressed the political nature of taxonomy work and the impact of user demands on the objectivity of the product. She asserted that:

“Far less has been written about what taxonomists in particular should do to examine political or cultural assumptions, to balance conflicting viewpoints,

or to take into account issues of subjectivity and objectivity in practical work, nor in the link between established best practice and philosophical theory.”
(Alexander 2009, p1)

The underlying theme in much of the taxonomy literature indicated that meeting user needs when developing a corporate information taxonomy would solve many development and implementation problems. For example, the National Archives UK stated that:

“User consultation is important for successful implementation of the BCS (business classification scheme)” ...“The user interface needs to present a comprehensible and friendly aspect to the end user. A purist functional approach ... would be unlikely to be a success if the semantics of the BCS - however robust and consistent in theory - are not understandable to them.”
(The National Archives UK 2003, p24).

In a similar vein, the National Archives of Australia recognised that there were a “range of stakeholders” with an interest in the classification tool but users were the “most important” (National Archives of Australia, 2003, p26). Lambe (2007, p182) stated that stakeholder involvement must be present at all critical stages of the taxonomy project as it “must reflect the needs and perspectives of all users, right from the design stage”. From her research, Alexander (2014) also found that the ‘user-centric’ approach to the creation of taxonomies was dominant in information studies.

In addition to the benefits proposed in the literature, we have found that the involvement of a greater number of users can also lead to disparate views, power plays and passive resistance to reaching common ground. User involvement is not the silver bullet to success as these issues need mitigating strategies by the taxonomist.

Lambe (2007, p129) acknowledged the need to “navigate political inter-group issues including differences between experts (insiders) ... and non-experts (outsiders)...” and that this, together with similar aspects, needed to be investigated further in research and the associated skills developed in taxonomists.

Jens-Erik Mai (2004) stated that the practice of classifying information “...has much more to do with interpretation and judgments than logic”, and that “...the design and construction of classification schemes need to start with an analysis of the domain” and “...studies of users’ information interactions, work and habits...”. He also identified that “...classifications are political in the sense that the creators have to choose to represent one particular view of knowledge...” (or a particular viewpoint). However, Mai did not specifically address how such subjectivity could be avoided when all stakeholders are not willing participants or there are overly influential participants.

Literature that related more broadly to information management, knowledge management or information systems implementation (rather than specifically to taxonomy development) seemed to better address the issues that we wished to consider in our paper. For example, Davenport et al (1992) recognised the impact of politics on organisational information management. When discussing the widespread awareness of

the need to create a knowledge-based organisation, they concluded that "...the rhetoric and technology of information management have far outpaced the ability of people to understand and agree on what information they need and then to share it." This translates quite well to the politics of taxonomies where people have difficulties agreeing on what taxonomy the organisation needs.

Lapiedra et al (2006) identified the need for user participation to minimise resistance to change and the "the more you involve, the greater the understanding and support for the (information system) plan". Although they did point out that this does not guarantee a positive outcome for the new system's implementation, and refer to other articles where "political problems involving competing user groups" present difficulties.

Nelson et al (2009) identified ten key organisational elements that, from their research, impact on effective information and knowledge management within organisations. They included information behaviour, organisational culture, information politics, and organisational structures.

Their research indicates that these elements could "provide a useful framework" for practitioners who are embarking on any information and knowledge management project within an organisational setting.

In their discussion on the effect of organisational politics on knowledge processes within global teams, Sidhu et al (2011) offered a number of steps to mitigate the impact. These included:

- "...getting people to speak out and expose troublesome issues, vent their frustrations, and engage with others in an open and transparent manner";
- managers needing "to be consistent in the way they support behaviours and align interests, goals, and responsibilities" among team members;
- renewing and renegotiating "norms and work habits on an ongoing basis..."

These steps are broad in nature; however, the article did highlight the need to recognise organisational politics as "an integral part of business and a fact of life that cannot be ignored." Research referenced by Nelson et al also reinforced the need to acknowledge and manage information politics "...to reduce the risk of IKM project failure".

Although organisational culture, change management, behaviour and politics are discussed in these more general information management articles and texts, few offer practical solutions that can be applied specifically to tackling such issues as they arise during taxonomy development.

4. METHODOLOGY: AN ANALYTICAL AND PRACTICAL APPROACH

Our analysis and discussion focuses on identifying organisational behaviour, social psychology and the latest impact of technology on the knowledge worker and taxonomist. We have researched articles and texts in the broader technology, human

resource management, project management and change management fields to identify typical organisational and group behaviours, and ways of managing such behaviours.

Where possible, to add a level of practicality to the theory and suggested techniques, we have also drawn heavily on actual situations that we have encountered during over one hundred taxonomy development projects. The projects were undertaken from the early 1990's until present for various levels of Australian government and private sector companies including in the mining, pharmaceutical, professional services, automotive finance and tertiary education fields. The techniques for development of the taxonomies included extensive user consultation, such as face-to-face meetings, workshops and submission of drafts for review and approval. During such projects, professional standards for best practice were also influential in the taxonomy design and development.

Accordingly, our joint experiences on such projects were analysed to identify:

- stakeholders. We considered both stakeholders within the organisation and any external entities with some level of interest or influence. The stakeholders were broadly categorised along organisational structure or project governance roles;
- the likely interest or expectations for each type of stakeholder, with respect to the taxonomy project. This was determined by the potential impact or benefits of the project on roles.
- the behaviour we observed during projects. This included stakeholder attendance at meetings, level of interest or involvement displayed during meetings, extent of feedback received, conflicts, lack of consensus, and post-implementation issues.
- the influence of the behaviour on the project processes or outcomes;
- potential ways of managing various 'political' situations based on proven or logical techniques.

A number of the projects analysed were selected as case studies to illustrate particular behaviour and management issues. They are discussed further in 7. *Understanding Stakeholders*.

5. UNDERSTANDING TODAY'S INFORMATION ENVIRONMENT

The Age of the Empowered Information Consumer

Due to rapid technological advances today, information has been commoditised and its access democratised. As consumers and knowledge workers, we are maturing and empowered, with the aid of technology, to more easily obtain it, create it, share it, update it, and publish it from anywhere and without the need for an intermediary.

We all own some kind of device through which we access vast quantities of information instantly with little effort and without apparently needing to engage in any kind of structured searches. We carry out searches that anticipate our request and deliver the results despite our misspelled words. All of this occurs without us having to interact with a taxonomy.

When accessing content from providers such as Google, YouTube and Netflix, we believe the majority of information consumers may be blissfully unaware of the considerable innovation and development that has been invested in these types of technologies to deliver an effortless and invisible search experience. Strickland (2006) expanded further on this concept.

Consumers are also empowered to organise their personal digital content as they see fit. They are no longer passive. Instead, they have personal experience in organising information, including tagging it on public sites, generating it, and making it available for others. In essence, they are already creating and using their own taxonomies, and for the individual, they could be perfectly appropriate. However, within this scenario, they are not trying to satisfy the varied needs of business users and the common good of an organisation.

Within organisations, the same consumers who have managed their personal information may be the subject matter experts and knowledge workers over which the taxonomy will be exerting influence. They will be very closely engaged with the creation or processing of the information that the taxonomy is attempting to harness and, by its nature, forcing them into controlled behaviour.

Combined with the external forces described above, today's knowledge workers may have a stronger sense of ownership over information and a greater sense of entitlement to the way it should be organised, labelled and managed.

These recent changes have seen some of traditional models of information management lose relevance. Rapid technological change requires a rethinking of the level of influence of individuals. As Tredinnick (2006, p) stated:

“Traditional approaches have tended to see information and knowledge as something existing independent of the user, which can be accessed, stored, classified and managed by reference to its objective characteristics. For example, the attempt to impose standardized classification schemes on information collections seeks to treat those collections as objectively classifiable.”

The Nature of Language and Taxonomies

Taxonomies are based on language and language can be very personal. It is subjective, learned and can be a habit that has been developed over time. It provides a basis for shared concepts, culture and values.

Jaspal (2009) suggested a strong link between language and social identity. While he discussed this within a social and cross cultural context, the discussion could equally be applied to language within the workplace and its linkage to workplace cultural or professional identity. Language is a combination of cultural norms encapsulated in idiosyncratic expressions, which provide a shared culture. When we create and impose

certain types of taxonomies, is it possible that we are interfering with those established norms?

In some cases, the language of taxonomies may be unnatural. People may feel uncomfortable “talking a foreign language” as it may be challenging their established and familiar ways of working and interacting.

The challenge for the taxonomist is to establish language consistency and robustness with minimal disruption to the organisational or professional language norms.

The Subjective Nature of Information Organisation

In a similar way to language, we believe the organisation of information can be subjective. It is based on how each of us, as individuals or as groups, “sees the world”.

The mental models that we subscribe to as groups have often developed over a number of years. Sometimes they are a result of being indoctrinated into our professions. Similarly, as individuals we carry our own, personal mental models of how information should be organised and labelled. This in itself is paradoxical as it is this very element that creates the need to establish a common standard for organising and labelling information so that we can communicate it and manage it across different environments and transcend different business models.

Stakeholders may feel an unease at being forced into a model that is normative and, therefore, restrictive. This potentially constraining nature of taxonomies was also raised by Alexander (2009, 2014) in relation to objectivity and subjectivity.

6. THE ROLE OF TAXONOMIES IN KNOWLEDGE ORGANISATION

The information management profession has known for some time that information is a key asset. Organisations rely heavily on information and try to harness it.

The taxonomy can be regarded as a key element of any information management governance framework. Accordingly, corporate taxonomies should help organisations in very practical ways. Their reliable information architectures with consistent language should:

- support audit readiness and compliance;
- support the ability of teams to more easily collaborate through a shared understanding of where information should be located;
- reduce the time it takes to locate information within a given context;
- help organisations to understand their customers, deliver products, and gain business insight;
- support the ability to look from the present into the past despite changes in language and terminology.

There are a number of contemporary authors and theorists who believe that the need for taxonomies (or more broadly the need for controlled organisation of information) may be diminishing in a world of sophisticated technology and users. With the popularity of social tagging/folksonomies and full-text indexing, some have argued that structured classification is obsolete and not worth the associated time and effort in development and implementation (e.g. Clay Shirky, David Weinberger 2008).

Within the business context, information *management* has a broad range of purposes beyond retrieval of information. Business information has to be properly managed to ensure its integrity and authenticity, as well as appropriate access, retention and disposal. Uncontrolled social tagging cannot achieve these objectives. Kipp (2011, p.30), in her analysis of social tagging and controlled vocabularies in a library setting, concluded that:

“the research studies of social tagging and controlled vocabularies suggest that tagging does not completely replace controlled vocabularies, but provides an added dimension to subject access from the perspective of the end-users.”

From our observations and research, there are sufficient arguments to indicate that the continued need for business information taxonomies exists. This is the reason we persevere with their development, despite any flaws in traditional development methodologies, and the variety of influential forces impacting on their success.

7. UNDERSTANDING STAKEHOLDERS

When identifying strategies to manage the potential politics of a taxonomy project, it is vital to firstly know who the stakeholders are, and the nature of their interests, expectations and influence. The taxonomist should not underestimate the value of analysing stakeholders and how they will impact the process, outcomes and the perceptions of the taxonomy project.

The expectations and influences of each stakeholder group or individuals are unlikely to be the same. As discussed earlier, stakeholders will be demonstrating behaviours that are the result of various factors.

Case 1: Failure to analyse stakeholders

The taxonomy project for a small organisation was progressing well. The contracted taxonomist had established a general set of rules that were discussed and agreed to by the internal project manager and managers of each business team; input and involvement from the subject matter experts was extensive; and the project had the added benefit of identifying process flows and where duplication of information could be avoided. Managers quickly signed off on the new taxonomy that would now serve as the structure for the organisation's shared network drive.

It seemed a mere formality to finalise the structure for the remaining area – the chief financial officer (CFO) – who was also the project sponsor. The CFO, however, did not wish to follow the other business areas and developed his own structure which included overlapping terminology and inconsistent hierarchies. He appeared personally affronted by any problems and improvements suggested by the taxonomist, and made it very clear that "he was paying for this project" and "this was the way he wanted it".

To avoid the risk of changing the previously agreed structure established for other business areas, the project manager and taxonomist decided to incorporate the CFO's structure in a standalone manner. The successful implementation of an otherwise consistent taxonomy was consequently compromised.

In Case 1, a powerful stakeholder had a negative influence on the project outcomes. The taxonomist and project manager made the wrong assumptions and failed to appropriately analyse and communicate with one of their key stakeholders, the sponsor.

As well as the influence of internal organisational stakeholders, taxonomists must be aware of the influence of those individuals and entities external to the organisation. Professional bodies and those responsible for developing, regulating or promulgating standards and codes of practice can exert considerable influence over organisations and taxonomists. For example, an organisation's executive, in an attempt to ensure organisational compliance with 'best practice', may insist on the taxonomist following a particular code of practice for taxonomy development without considering its applicability to their organisation.

Similarly, taxonomies may be developed that do not suit the needs of organisations because taxonomists have been inflexible by following rigid professional models that are not readily adaptable to the business world.

The taxonomist should be aware that the expectations, interests and influence of stakeholders may change during a project. Part of the process of managing the politics is to analyse stakeholders at the start of a project and throughout it.

We can also refer to theories of power to analyse the type of influence exerted by stakeholders over a taxonomy project. For example, a number of authors identified by Heinemann (2008) referred to the studies by French & Raven (1959) in relation to identifying power types. They can be summarised as:

- coercive power (using threats and punitive measures);
- reward power (self-explanatory - using rewards);
- formal/legitimate power (using one's position of authority or power over resources);
- expert power (using one's specialist knowledge and skills); and
- referent power (using one's personal charm or charisma).

Change management literature also has a wealth of tools and techniques for understanding and analysing stakeholders. A stakeholder analysis matrix identifying various attributes such as type of stakeholder, their interests, expectations, likely commitment, risks, and level of influence, can assist in predicting behaviour and preparing strategies.

Table 1 provides a generic matrix to assist in the identification of typical information management taxonomy stakeholders, their potential expectations and influences. We have referred to "formal power" and "expert power" in relation to some stakeholders. The analysis in Table 1 is at a broad level and is not intended to be exhaustive or necessarily true of all organisations.

Further detailed analysis of the organisation's selected individual or group stakeholders is also recommended to understand the unique issues within the organisation. The time and effort spent on such a task will depend largely on the nature, size and complexity of the organisation.

Table 1: Taxonomy Stakeholder Interests and Influence

STAKEHOLDER	EXPECTATIONS	DEGREE & NATURE OF INFLUENCE
Information/ knowledge manager (internal)	<ul style="list-style-type: none"> ● Best practice ● Compliance ● Satisfy user needs ● Easy to maintain/update ● Sustainable over time ● Consistent ● Relatively simple and intuitive 	<ul style="list-style-type: none"> ● Can be high if organisation focussed on standards and compliance ("expert power") ● Can influence the design and structure
Taxonomy developer (internal or external taxonomist)	<ul style="list-style-type: none"> ● Satisfy stakeholder needs ● Appropriate for information governance/compliance requirements 	<ul style="list-style-type: none"> ● Can be high ("expert power") ● Can influence the design and structure
Project manager	<ul style="list-style-type: none"> ● Taxonomy can be delivered on time and on budget 	<ul style="list-style-type: none"> ● Can be high for the duration of the taxonomy development project phase ● Influences the taxonomist, sponsor project team, and general stakeholders ● Limited influence once the taxonomy handover is completed.

STAKEHOLDER	EXPECTATIONS	DEGREE & NATURE OF INFLUENCE
Taxonomy project sponsor	<ul style="list-style-type: none"> ● Securing and maintaining project resources have been worth the effort ● The project will have met other stakeholder expectations 	<ul style="list-style-type: none"> ● High - can make or break the taxonomy through project phase resourcing (“formal power”) ● Can have significant influence with executive / senior management
Executive/ Senior Management (internal)	<ul style="list-style-type: none"> ● Low cost and impact on the organisation, and create efficiencies for business processes ● The workforce will be satisfied, and productivity either unaffected or affected positively 	<ul style="list-style-type: none"> ● High (“formal power”) ● Can influence level of resourcing allocated and, consequently, the appropriateness, completeness and maintenance of the taxonomy
ICT Manager (internal)	<ul style="list-style-type: none"> ● Easy to implement within system environment ● Satisfy user needs 	<ul style="list-style-type: none"> ● Generally quite high (depends on organisation/individual) ● Can influence implementation (timing, ease of use, etc.)
Information Management Systems Developers/ Vendors (internal/external)	<ul style="list-style-type: none"> ● Easy to configure within their solution 	<ul style="list-style-type: none"> ● Can be quite high (particularly if sourced by ICT department within the organisation) ● Can influence implementation (ease of use)
Knowledge workers/ end users (internal)	<ul style="list-style-type: none"> ● Easy to use/intuitive for saving and finding their information 	<ul style="list-style-type: none"> ● Generally quite high (lack of use will lead to system’s failure) ● Can influence completeness/accuracy of product and implementation (uptake)
Regulatory/standards/ professional bodies (external)	<ul style="list-style-type: none"> ● Compliance ● Theoretical considerations (e.g. appraisal) 	<ul style="list-style-type: none"> ● Can be high (“expert power”) ● Can influence the design and structure
Future researchers/ users of the information/ custodians of information repositories (internal/external)	<ul style="list-style-type: none"> ● Ability to retrieve and understand the purpose, reliability, accuracy and provenance of the information 	<ul style="list-style-type: none"> ● Low (but would/should be considered by regulatory bodies/standards developers)

Managing this diverse range of stakeholders, expectations and influences, including those of the taxonomist, is a challenge for any undertaking such a project. There is no simple solution but proper awareness and preparedness is the key. The taxonomist needs to be prepared for common behaviours and have strategies at hand to deal with such situations.

8. MANAGING STAKEHOLDER DYNAMICS

We would now like to turn our attention to further stakeholder behaviour scenarios that we have experienced and/or have found discussed in the literature. We also suggest possible responses to particular behaviours to mitigate their impact or strategies to avert their emergence. In doing so we offer, what we hope are positive and ethical approaches to managing the politics of taxonomies.

The following behaviours may well present themselves in a very subtle manner, to the extent that they may not be initially evident. McIntyre (2005) referred to the need for political astuteness in order to read the warning signals of politics.

The Accidental Sponsor

It is not unusual to have a situation where a sponsor, who after having established an initiative, may move to another position. The sponsor's position is subsequently re-filled - enter the "Accidental Sponsor".

The concept of the Accidental Sponsor has also been discussed in project management literature such as James et al (2013) in relation to the appropriateness and preparedness of the person placed in the role of sponsor.

The importance of the sponsor cannot be underestimated. The sponsor will be called upon to provide various forms of support including actively supporting or managing issues when needed. It is critical not to be complacent and assume that the new sponsor will have the same level of ownership, belief or understanding that the previous sponsor held. It is unlikely that the new sponsor will have the full background on the taxonomy initiative or the level of commitment the previous sponsor may have developed. This lack of understanding or lack of buy-in can result in a perception that the taxonomy project is a low priority. The sponsor's lack of interest in the project can result in them making themselves unavailable for sponsor updates, not providing the level of support required, and avoiding involvement in issues which can be reasonably expected of such a role.

The lack of information management understanding of the chief executive officer and other executives, their role within it, and its effect on change has been identified as a number one issue in the literature. (McLeod et al, 2010)

To overcome a lack of executive awareness and understanding of a taxonomy project, it is crucial to induct the sponsor through various levels of education and engagement. The sponsor will have a stake in the strategic interests of the organisation either directly or indirectly by virtue of reporting to more senior managers. By demonstrating the strategic alignment of the taxonomy to the organisational objectives or issues, one is more likely to win the heart and mind of the sponsor who will then be more inclined to reinforce its importance to the executive.

The importance of the sponsor's commitment and support is illustrated in Case 2. Without it there would have been significant consequences for this particular project.

Case 2: The committed sponsor

An external project manager was engaged to implement an electronic document management system throughout a large and complex organisation. The principal focus of the project was user acceptance and ease of use.

Several months before "go live", it became apparent that there was no suitable taxonomy to support the system. In an effort to meet project deadlines, the project manager was seeking a "quick fix" and a taxonomy that would appease users. She requested that the project consultant, an experienced taxonomist, produce such a tool based on current network drives. The taxonomist raised concerns that the proposed design would require constant maintenance and was unsustainable over time, and suggested that these risks be conveyed to the project sponsor. The project manager refused.

The taxonomist had a longstanding business relationship with the project sponsor so contacted him directly with her concerns. As a result, the project sponsor took the necessary steps to explain to the executive that the project would need to be delayed pending further taxonomy design and development.

Maintaining ongoing communication with the sponsor is essential during the whole process. Apart from the necessary requirements to keep a sponsor informed, regular communication with the sponsor will provide the taxonomist with opportunities to influence the process.

Driving personal agendas

Organisational politics is about personal and group agendas, and such agendas can present themselves as opportunities or hindrances for a taxonomy project. The political skill and agility of the taxonomist needs to come into play here to ensure that agendas can be used to support the project, whenever possible.

Case 3: Using the taxonomy to drive personal agendas

A meeting was held with the manager of a department to introduce a knowledge management project and explain its components. The taxonomy was one of them. During the development process the manager immediately seized the opportunity to request that the functional category (top level term) be assigned a phrase which was in fact one that he wanted his department to be renamed to, but had not been able to achieve to date.

The taxonomist did not grant the request for the functional category name, and the user (indirectly) became less enthusiastic about the project.

Case 3 illustrates that being open to alternative views, which may depart from established industry practice, may allow greater value to be achieved towards the objectives of the taxonomy by weighing up the cost of “breaking the rules” against the benefits to be gained by achieving buy-in.

Case 4: Changing agendas

An influential manager was reluctant to engage in the system in which the taxonomy was embedded. The department had an existing long standing structure in which users were familiar and had been trained. The manager completely derailed the project within their department. It was agreed with the sponsor that their department would be placed at the bottom of the list of priorities.

Sometime later after taking up another role in the organisation, the manager had a need to ensure his new geographically dispersed team members placed their documents in a common area. The manager approached the taxonomist and requested that a structure be implemented to support this need. He was now a convert.

Cases 3 and 4 support the notion that the taxonomist needs to be skilled at reading and assessing a situation and being able to adjust their approach accordingly. Occasionally, timelines need to be adjusted to the politics of the organisation, even if it means a longer term view of the project has to be adopted.

Achieving Consensus

A common problem experienced and one that has been discussed by a number of authors including Alexander (2009, 2014), is the potential lack of consensus on terminology or structure either between end-users or between end-users and the taxonomist. We believe this issue stems back to the close relationship between language

and organisational or professional culture, as well as an individual's mental models of how the "world" should be organised. Case 5 serves as an example of this issue.

Various taxonomy development techniques can also be used to quickly and effectively demonstrate the challenge of consensus to participating stakeholders. For example, the use of "card sorting" is such a technique. We believe these types of group activities and group discussions are invaluable, as participants can collectively experience the lack of consensus first-hand, potentially develop a greater level of self-awareness and

Case 5: Lack of consensus

A meeting between two senior managers to discuss the way to structure their branch's folders was facilitated by an external taxonomist. Both managers worked in the same division and managed similar business processes that required their collaboration; both had longstanding experience in their positions; and both were willing participants in the meeting.

During the meeting, one manager was particularly vocal and certain of the structure that would best suit the business process requirements. After white-boarding the structure and reaching an apparent agreement, the draft was distributed by the taxonomist, and reviewed by the two managers and their teams. Finalisation, approval and implementation of the taxonomy seemed imminent to the taxonomist. Unfortunately, this is not how it evolved.

The vocal manager was relatively happy with the draft and requested only a few minor changes; the other manager and his team suggested wholesale changes with the added comment that the original draft structure would simply "not fit the way they worked in the branch".

The taxonomist had not foreseen this difference of opinion or prepared for it, thereby making resolution difficult, lengthy and objective intervention necessary.

consequently self-adjust in their attitudes and behaviours and practise a greater level of compromise.

From our perspective, such an approach supports an open, collaborative and ethical environment. It de-personalises the "conflict" and focuses on utilising the process and shares the burden otherwise shouldered by the taxonomist. This approach takes the focus from the taxonomist acting as a mediator and diplomat and focuses energy and action on managing a more objective process.

Resistance to Change and Project Engagement

The development of a new taxonomy will represent a change for an organisation's internal stakeholders. The likely behaviours associated with change resistance cannot, therefore, be overlooked.

Kotter (1996) emphasised the importance of the change leader understanding the underlying reasons that people resist change rather than solely addressing the symptoms.

Further to this, Kanter (2012) stated that resistance to change can manifest itself in various forms; from behaviours such as “foot dragging” to inertia. Until the reason for the resistance is understood, it is difficult to effectively deal with it.

Kanter found that the most common reasons for resistance were:

- loss of control;
- excess uncertainty;
- surprises;
- change in process;
- loss of face;
- concerns of competence;
- ripple effects;
- more work;
- past resentments; and
- that sometimes the threat is real. In relation to final point, she stated:

“The best thing leaders can do when the changes they seek pose significant

Case 6: Varying levels of resistance

To ensure informed involvement from subject experts in a technically-orientated organisation, it was decided that pre-consultation briefing sessions would be held for stakeholders from all levels of the organisations. Business teams and their managers were invited with an explanation that their involvement was essential to ensure reliability and completeness of taxonomy.

In the majority of cases, managers and senior members of the teams failed to attend the briefings. Those staff members who were briefed and subsequently contributed to the development of the taxonomy were not confident in representing more senior staff, and consequently major gaps in coverage occurred.

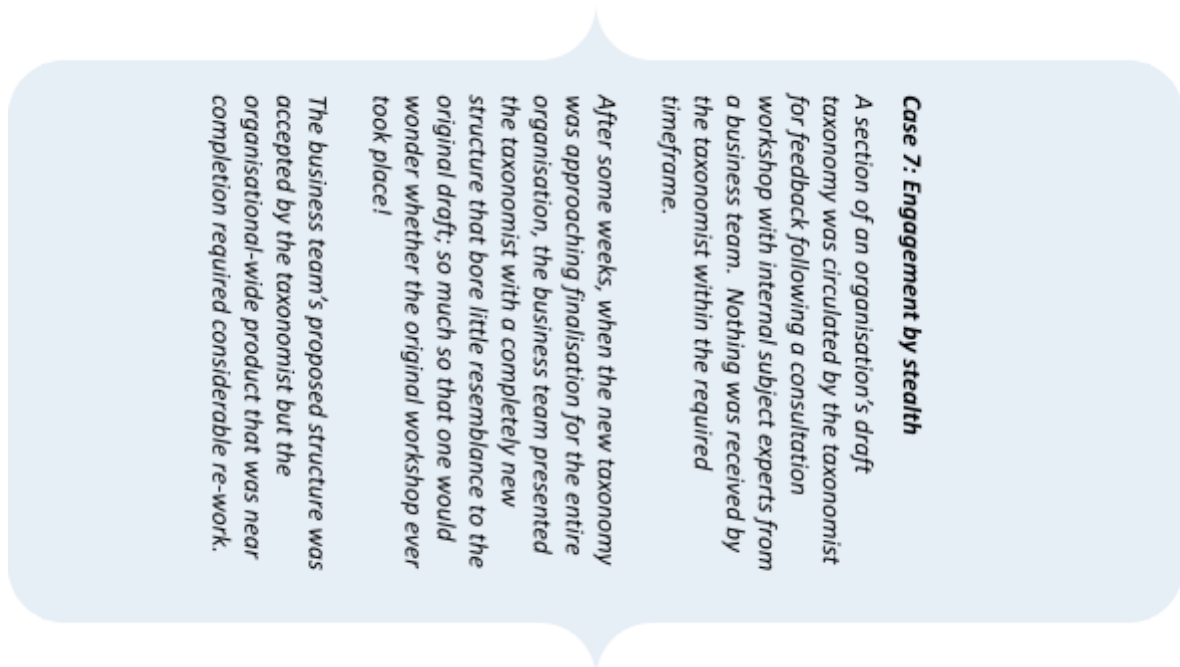
The gaps in the draft taxonomy were subsequently used by some managers to reinforce their initial resistance to the project because the end result “did not represent their business processes”¹

A second round of meetings, where managers were briefed personally and their support gained had more success. Once senior staff were aware that their managers were on-board, their willingness to participate increased.

threat is to be honest, transparent, fast, and fair.”

As illustrated in Case 6, while passive resistance can occur at various levels of an organisational hierarchy, the most difficult could be that which takes place at the upper levels of the hierarchy where power and influence are greater.

Typical examples of such resistance would be indicating agreement or support by word alone, but not by action. The lack of action may be exhibited by not engaging in the process such as not attending workshops or meetings, and displaying other subtle behaviours such as delays in responding to approval requests.



Interestingly, we have experienced the scenario described in Case 7 on a number of occasions.

Bregman (2009) provided some insight into this behaviour and how it could be managed. He said it is the *act* of being changed that creates resistance behaviours. Furthermore, to avoid the resistance, stakeholders should be given control and allowed to make decisions. Within the context of creating taxonomies this level of involvement could start from early in the planning, information gathering and consultation, building and group testing phases.

Group and Individual Dynamics

Dynamics of individuals and groups are impacted by organisational culture, its senior leaders their relationship within the group and between groups. The work of the taxonomist and the groups and individuals involved may come under the influence of group dynamics.

A lack of strong leadership can create the opportunity for dominant group members to take charge, indirectly leading the group or the discussion in ways that were not anticipated. The likely impact is that the dominant team members may unintentionally derail the approach and outcomes. This could present itself as inappropriate taxonomy decisions being made or no decisions.

Some of the causes for poor group dynamics can be attributed to the behaviour of

individuals. This includes individuals who block the process through constant objections or whose personalities are such that less forceful members of the group are less likely to contribute. Similarly, there will be members of the group who refuse to participate adding no input to the process. There may also be situations where some members of the group will defer to a more senior or influential member whose level of knowledge is not commensurate with their influence.

We wrote earlier of the need for consensus, but there can also be a negative side associated with group dynamics that creates a risk for the quality of the taxonomy. “Groupthink”, a concept discussed by a number of social psychologists such as Nevid (2009), refers to the situation where people place a desire for consensus above their desire to reach the best decision. As a result, critical evaluation and proper exploration of alternatives may be prevented. Case 8 is an example of such a situation.

Case 8: The Impact of ‘Groupthink’

A large group of stakeholders had been gathered in a facilitated workshop to discuss taxonomy requirements. Most had attended begrudgingly as the only available time was 5.30 pm.

Participants were slow to respond to questions around business processes and their preferred terminology, and it became clear to the taxonomist that an underlying desire to finish the workshop as quickly as possible was developing. Eventually, this became overt behaviour with some participants ridiculing anyone who took more than a couple of minutes to describe a particular process. “Does it really matter?”, “Is that really what you do?” or “Just use this term; we’ll know what it means” became familiar themes.

The taxonomist could see that the input was going to be rushed and ill-conceived, so the workshop was terminated as politely as possible. Input was pursued in smaller groups, and then the larger group consulted via email. This approach was necessary to counteract the negative group dynamic that had occurred.

A number of factors will influence how well these dynamics can be either averted or managed if they present themselves. These include the ability of the taxonomist to be aware of or recognise the dynamics being played out so that they can be responded to and managed. This may be part of stakeholder analysis, as discussed previously. It can include the use of some form of circuit-breaker technique such as a simple exercise undertaken by individuals during consultation meetings where “groupthink” is impacting negatively.

Managing Stakeholder Expectations

Closely managing the expectations of what the taxonomy will deliver, what benefits and when it will deliver them, will impact perceptions of its effectiveness and user satisfaction levels.

Taxonomy projects can be distinguished from some other projects with which stakeholders may be familiar. For example, the point at which they are completed can be perceived differently, and thereby requires careful management. In our experience, the taxonomy is never really “completed”. For a taxonomy to be truly effective, the development process is often iterative and its evolution continuous.

As a result, the *success* of the taxonomy project cannot always be related to its perceived completion date and is instead a moving target. So at what point is the taxonomy deemed to be complete and its success (or otherwise) declared? The intended formal closure of the project and the road ahead need be clearly defined and communicated at the outset. In addition, the project manager or taxonomist should explain to their internal stakeholders (sponsor, managers, end users, project team, etc.) that there will be points at which formal reviews will take place and the means by which change requests will be managed.

As well as confusion over the nature of the taxonomy development project, we have observed stakeholder expectations being unwittingly raised by unrealistic claims concerning the benefits and ease of use of the taxonomy.

Users should not expect to be immediately familiar and comfortable with a developing taxonomy. Many users will need time to get accustomed to even the most intuitive.

Moreover, the intended benefits for an individual may not be the same as those required by the organisation. For example, the main benefit that the user seeks is generally ease of information storage and retrieval, and this may be inadvertently “over-sold” by the project manager or taxonomist in order to gain buy-in from knowledge workers or subject experts. At the organisational level, the objective could be management of information assets over time. These expected benefits at an individual and organisational level will often lead to a conflicting design. It will largely depend on the organisation and its business culture as to the benefits that should be legitimately promoted as corporate objectives.

If stakeholder expectations such as those discussed above are not managed, the taxonomy may unjustly be perceived as a failure. Accordingly, the following need to be communicated repeatedly to stakeholders:

- The taxonomy is not a standard project. Its completion is not, for example, the same as the development of a database where the system “goes live” and users given access.
- It is not a “quick fix” that will magically rein in all corporate information. It should be viewed as a tool that is sustained over time and continues to be developed iteratively in response to various factors such as business function and organisational changes.
- The taxonomy will involve change and therefore require time for adjustment.
- The taxonomy will be designed to meet corporate objectives.

Taxonomists should not forget to manage their own expectations. They should not feel affronted by the fact that not everyone in the organisation will necessarily accept the

taxonomy's design. As Alexander (2009) alluded to - it's difficult to try to please everyone. The project sponsor and project manager should also be made aware of this reality, and their expectations maintained accordingly.

Stakeholder Awareness and Understanding

Kotter (1996, p85) pointed out that:

"..gaining an understanding and commitment to a new direction is never an easy task...Managers under communicate and often not by a small amount".

Raising this level of awareness and explicit understanding of the nature and role of taxonomies with stakeholders may make them less inclined to engage in political gamesmanship or similar behaviours. This is particularly true if the message is conveyed by an influential and proficient communicator.

Taxonomy development is a highly specialised task. When we ask our stakeholders to be involved in the consultation or development process, we need to thoroughly understand the impact of this not being their area of expertise. The "expert" taxonomist, with his or her years of experience, is likely to bring a certain level of entrenched and unarticulated assumptions which may also contribute to the lack of effective knowledge transfer.

Taxonomists should not assume that all stakeholders have a clear understanding of the purpose and objectives of the project. While the alignment of the taxonomy to organisational objectives or initiatives will have been a significant factor in achieving its sponsorship, the *communication* of this alignment is a key tool that can be used to advantage with other stakeholders.

Accordingly, it may be appropriate for stakeholders to be made aware of:

- explicit linkages between organisational objectives or other key strategic initiatives;
- how the taxonomy will have an impact on the success of their current initiatives;
- how the lack of a taxonomy may contribute to ongoing risk if it is not completed; and
- the importance of the project to more influential and senior members of the organisation.

The taxonomist should also not assume that stakeholders will quickly grasp the principles and rules of a taxonomy. While subject matter experts and end users can be briefed, educated and consulted, once they start using the taxonomy, they will likely develop a new level of awareness and understanding of it. The interaction of the taxonomy with the technology that it sits in will also impact on their experience, knowledge and consequent reaction to it.

Uncertainty and lack of knowledge about the taxonomy will more than likely create negative behaviours and attitudes about it. After having had practical experience interacting with the taxonomy, some may develop the unwelcome realisation that it is not as they expected, that it does not fully meet their business needs or is too difficult to use.

We have particularly found this in instances where the taxonomy initiative is part of a larger technological change within an organisation.

While there may be challenges in communicating concepts and principles of the taxonomy and its development methodology, there is evidence to suggest that the investment in educating stakeholders to this detailed level will create a greater level of conviction and less resistance to the project (Khadilkar, 2015).

Concerted education and communication effort should create a clear picture of the final product's appearance, using numerous examples, especially before and after models. Allow users to test the taxonomy within the technical environment in which it will be embedded.

As pointed out by Early and Associates:

“Helping the audience to understand the underlying concepts is one of the biggest challenges that taxonomists face. Spending time up front to explain the concepts in clear, plain terms will go a long way.....”

The Taxonomist as a Politician

Power relationships and the influence that they bring were identified previously in our discussion concerning the need to understand stakeholders. Let us now look at this in relation to the taxonomist.

Influence is a political tool in project management and like the project manager, the taxonomist has to “exercise influence without authority”. This, for example, could be by listening and empathising (Bahrami and Evans, 2010, p. 139). Other writers have also suggested that as trust increases, so does influence (Kotter, 1996; Pinto, 2000).

Pinto (p. 89) referenced Keys and Cases' five key steps to increasing political influence:

- *Develop a reputation as an expert.*
- *Prioritise social relationships on the basis of work needs rather the basis of habit or social preference.*
- *Develop a network of other experts or resources persons who can be called on for assistance.*
- *Choose the correct combination of influence tactics for the objective and target to be influenced.*
- *Influence with sensitivity, flexibility and solid communications.*

This does not mean the taxonomist should take the line of least resistance by trying to be inclusive of every stakeholder's view in the final product.

If we think back to Case 2 where the taxonomist called on the support of the influential project sponsor to overcome an impasse with the project manager, she was playing a particular political game. In doing so, she was using her “expert” knowledge and power relationships to influence the outcome and achieve a design that conformed to her professional standards.

The taxonomist also makes decisions, conscious or otherwise, concerning whose contributions and influence will be considered when designing and developing a taxonomy.

Alexander (2009, 2014), when applying Longino’s framework, included the need for intellectual authority criteria to assess contributors. Within any given setting, whose contribution should be given more weight over another’s?

It could be reasonably assumed that subject specialists should be the key contributors to relevant sections of the taxonomy. For example, with the taxonomist’s guidance, the human resources manager could determine the structure and terms for human resources related information, the finance manager the structure and terms for finance information, and so on. This operates satisfactorily in the majority of cases but problems can arise when the so-called subject expert is new to the position or subject area, overly theoretical in their approach by basing structure on the key areas of their discipline rather than the way in which information is created and used, or do not accept or understand the rigors of a structured approach to information management. Moreover, from our experience, there may be staff members outside the subject area who have suggested more logical and robust taxonomy labels and structures to those expected from the subject “specialist”.

In determining whose contribution is more important and which standards should be followed, is the taxonomist one of the most influential stakeholders? Taxonomists must be aware of how their own values, beliefs, knowledge and subsequent behaviour are positively or negatively influencing the project outcomes.

Mitigating Behavioural Issues: A Summary

In concluding our discussion on stakeholder dynamics, Table 2 summarises common issues that a taxonomy development project is likely to confront, their possible causes, impacts and suggested mitigating action. As with Table 1, this is not intended to be exhaustive or representative of all potential behaviour but will hopefully serve as a model for further development or application by taxonomists embarking on such a project.

Table 2: Behavioural Roadblocks

STAKEHOLDER BEHAVIOUR	CAUSE	IMPACT	MITIGATING ACTION
Disengaged / Uninterested	<ul style="list-style-type: none"> ● Not all key stakeholders have been “sold” on the value of the taxonomy project ● There are competing priorities (product 	<ul style="list-style-type: none"> ● Poor attendance at project meetings ● Little or no feedback is received on drafts ● Incomplete taxonomy or user rejection 	<ul style="list-style-type: none"> ● Establish rules for engagement and communication strategy early in the taxonomy development project ● Demonstrate a clear linkage between the taxonomy and organisational objectives,

STAKEHOLDER BEHAVIOUR	CAUSE	IMPACT	MITIGATING ACTION
	deadlines, other projects, etc. competing for their time)		compliance obligation or the success of a system <ul style="list-style-type: none"> ● Document the risks and bring to the attention of the project sponsor ● Share risks with influential stakeholders
Inability properly explain work processes or functions	<ul style="list-style-type: none"> ● Key areas of the organisation are not appropriately represented (e.g. temporary personal assistant syndrome) ● Stakeholders are not sufficiently aware of processes 	<ul style="list-style-type: none"> ● Incomplete or inaccurate information used as the basis for the taxonomy ● Taxonomy is not robust and may be rejected by users 	<ul style="list-style-type: none"> ● Clearly specify the qualifications and experience required of stakeholders ● Inappropriate stakeholder representatives should be flagged with the project sponsor ● Limit the scope of the taxonomy if areas are inadequately represented
Power games are played, and/or emergence of “power wielders”	<ul style="list-style-type: none"> ● Individuals bring their values, beliefs and egos into their decision-making ● Other internal organisational matters and conflicts influence taxonomy decisions 	<ul style="list-style-type: none"> ● Resistance to suggestions from “less powerful” groups or individuals ● Resulting taxonomy is overly subjective ● Unrepresentative taxonomies may be rejected by users 	<ul style="list-style-type: none"> ● Obtain agreement from the sponsor regarding the approval process ● Establish a means of resolving conflict that may arise between groups; establish who will be the final arbiter ● Document in the rules prior to stakeholder consultation ● If there are known conflicting opinions/ personalities, ensure an arbiter who is independent from both is selected
Individuals assert their knowledge and individuality (“my way is the right way”)	<ul style="list-style-type: none"> ● Theory may differ from practical requirements within an organisation ● Siloed working environments may lead to siloed work practices and lack of teamwork 	<ul style="list-style-type: none"> ● Application of theory may lead to an impractical / unworkable structure ● Taxonomy lacks enterprise consistency and meaning, and future robustness ● Users reject the taxonomy 	<ul style="list-style-type: none"> ● Establish and obtain management agreement for the development approach and rules to be taken ● Communicate the rules and why they exist at every opportunity ● Run objective testing sessions
Appeasement (the “yes” person or “taking the line of least resistance”)	<ul style="list-style-type: none"> ● The taxonomist is attempting to be overly democratic by including all stakeholder suggestions rather than analysing and 	<ul style="list-style-type: none"> ● The taxonomy is inconsistent and imprecise ● In the long term, the taxonomy does not 	<ul style="list-style-type: none"> ● Conflicting opinions should be addressed and resolved ● Try to approach the taxonomy development with an awareness of the

STAKEHOLDER BEHAVIOUR	CAUSE	IMPACT	MITIGATING ACTION
	assessing the impact of conflicting terms or structures <ul style="list-style-type: none"> ● The stakeholders are influenced by the authoritative taxonomist 	satisfy stakeholder and organisational needs	needs of the organisation as a whole <ul style="list-style-type: none"> ● Keep in mind the objectives of the taxonomy when considering suggestions
Stakeholders expect more than can be delivered	<ul style="list-style-type: none"> ● Unrealistic expectations raised ● Processes and principles have not been explained 	<ul style="list-style-type: none"> ● Overt and covert resistance ● Project team morale is lowered 	<ul style="list-style-type: none"> ● Manage expectations that taxonomy will not be the last version when it is released the first time. It is an iterative process. ● Establish a formal change mechanism for the taxonomy and make this known from the outset of the project

9. FRAMEWORK AND RULES

Much of our discussion to this point has focussed on various scenarios impacting behaviour and the potential ways of preventing or addressing them. It is evident from our experiences and those described by others that proper governance of taxonomy development is vital.

There are a number of benefits to establishing a formal framework comprising the management and technical process that will be followed. In effect, this is laying down the ground rules for the development of the taxonomy.

Each organisation and each taxonomy project may be different. However, the framework could include elements such as:

- The project case for the taxonomy or what is “broken” and requires fixing;
- The objectives of the taxonomy;
- The governance framework for the project and lines of accountability, including formal role descriptions of the project team members or participating users;
- Rules and protocols to how issues or difference of opinion will be managed;
- How it will be tested.

Having a formal framework in place, which has been endorsed by the sponsor and other key stakeholders, reduces potential confusion and incorrect assumptions. It will help the taxonomist maintain a greater degree of control over the process without the constant need for justification of actions. It can fill a void that, if left empty, will invite natural

“leaders” who may want to influence and control the direction of the project. When socialised, this approach depersonalises the process and diffuses potential conflicts.

10. CONCLUSION

There is sufficient professional opinion to suggest that there will be an ongoing need for taxonomies to organise corporate business knowledge for the foreseeable future. As such, there will be a need to design and develop these tools to best meet the needs of organisation concerned and its knowledge workers.

Such taxonomy development projects will undoubtedly continue to be influenced by organisational politics as they challenge the way stakeholders think and work. Accordingly, it is worth building a body of literature that will help taxonomists understand and manage the range of behaviours and situations that directly relate to such projects.

Project management, change management and other organisational behavioural or social psychology theory can assist to better deal with the often-overlooked political landscape of the taxonomy development project.

We have shown how these resources can be drawn on, and in doing so have attempted to highlight and address a number of the common issues that taxonomists face. We believe that regardless of the situation, it is important to deal with issues in an open, honest and ethical manner.

If taxonomists are aware of the political forces at work, and the influences (including their own) that are affecting decisions, they are more likely to develop appropriate strategies and techniques, recognise any limitations of their project and manage expectations.

To assume that any business information taxonomy will meet everyone’s requirements is to assume that everyone in the organisation thinks the same, understands the world the same way, has the same level of education and generally accesses and uses information in the same way. It is because of these differences that we face political behaviour from stakeholders.

Be aware of the politics, manage it and capitalise on it in a positive way wherever possible.

Further research

We hope that this paper has provided a new and relevant perspective on the development and management of taxonomies. While it has focused primarily on the

impacts of internal organisational politics, we consider it a starting point for further and much needed research. For example, research into:

- the impact of the suggested mitigating actions; and
- the existence and effect of external and broader political issues and their impact on public-facing taxonomies.

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