




How to Build an
Enterprise-Grade
***Marketing
Taxonomy***

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When a large organization gets ready to launch a new marketing campaign, there's a great deal of vision, work, and planning involved in bringing it to fruition.

It needs to be able to send a unified message across different departments, through different channels and to different consumers seamlessly.

Simply put, there are a lot of moving parts.

This process requires a lot of data. In order for that data to work, it needs a framework or a structure to follow. This framework is known as a marketing taxonomy.

Think back to your days in the school library.

When you needed to find a book, you didn't just roam the shelves hoping you would find what you needed. You used a system, the Dewey Decimal System, to find the specific title you were looking for.

The library would classify books into different sets in order to make them easier to find and access. Sometimes these categories overlap, sometimes books are filtered into different categories, but **the system provides the structure necessary to make the library more efficient.**

This is what a unified taxonomy can do for your business. It will not only keep your marketing concepts and data organized, but it will optimize your company's results. Many of today's top global brands rely on enterprise-grade marketing taxonomy. We know, because we work with them to develop this system.

And you don't have to be a Fortune 500 company to implement the same structure these brands rely on.

Even if you aren't a large global enterprise, developing an enterprise-grade marketing taxonomy is what will help you get the most out of your content. If you want a better experiences and a higher ROI from your marketing and advertising investment, the right taxonomy is essential—you just need to know how to build it.



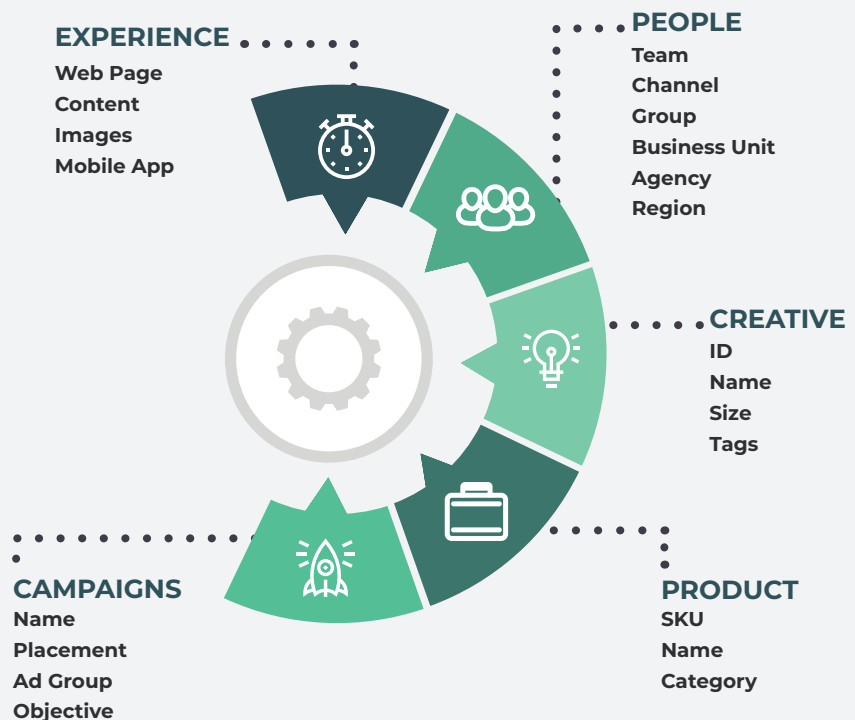
Metadata And Tracking Codes*: The Foundation for Your Marketing Taxonomy

As you start to look at the big picture of your marketing taxonomy, you need to first understand the role played by metadata and tracking codes. They work with each other to create a crucial framework. While equally important, they have two very different roles in your taxonomy initiative.

Metadata 101

Before you can start building a marketing taxonomy, you need to identify and understand your metadata. On a very basic level, **metadata describes other data**. It is essential to the taxonomy process because it labels information so that it can be sorted appropriately.

WHAT IS METADATA?



*We're using standardizing your tracking codes as an example of how to use your marketing taxonomy. Similar rules apply when creating content, product catalogs, digital coupons and more.

Metadata lives in nearly every component of an organization, which makes the task of implementing a standardized metadata library one of the biggest obstacles most companies will face while building their taxonomy. There will be a lot of information to organize.

However, before you can dive into this process, it is important to understand what exactly your metadata is so you have a better understanding of its roles.

Start by looking at the different areas of your organization that house metadata.

Typically, this includes the following departments:

- Marketing
- Merchandising/inventory management
- Project management (i.e. Workfront)
- Creative/content management systems
- CRM systems
- Product management systems

These areas typically represent the highest level in which metadata is defined. Once you identify these categories within your own establishment, you can start to understand the relationship between them, so you can start to create a hierarchy.

For example, the key from a product catalog may be the product ID. But is there a relationship between that value and a category key?

Once you understand the hierarchy and relationship between your metadata datasets, or *how you're tying this data together*, you can dive into the individual sections to further understand *what data is available*.

Key Components of Building Tracking Code

Tracking codes are another key building block to your perfect enterprise-grade marketing taxonomy. Marketing campaign tracking codes collect data about a user's online pattern of behavior. Tracking codes provide a key into a wealth of data and insights that can be used to better understand the consumer.

However, there are a lot of misconceptions about tracking codes, such as how they're structured.

Standardized vs. Consistent Tracking Codes

When it comes to tracking codes, one of the most common terms you will hear is *standardization*. After all, standardized tracking codes are critical to data maturity. It also means you have a clearly defined taxonomy that teams and partners should be following. You have created a *standard* for them to follow.

Unfortunately, standardization is often confused with "consistency." These are two very different terms. *Tracking codes do not need to be consistent to be effective*. They just need to all meet the same standard.

It's a common misconception that tracking code taxonomy needs to be consistent in order to have a mature, clean data model. If you are dependent on a consistent taxonomy structure to decode and parse out components of your system, then generate your meta-data fields, it can prevent you from pivoting your data and viewing your reports in a beneficial manner.

That, by definition, is not a mature data structure. It is one that is prone to error.

While you can strive to enforce consistency in the taxonomy, it isn't a hard and fast rule. Consistency is nice and it makes your tracking codes look pretty, but pretty doesn't matter. What matters is the data you get from those tracking codes.

Sure, if you are planning on making sense of rows and rows of tracking codes, having them well-aligned and tied up in a nice little package would make things easier. But who wants to be dependent on looking at reports solely by tracking codes?

For example, the following tracking codes are very clean, pretty, and well aligned:

Email-2020 Blue Shoes-Eloqua-Retention
Paid Search-2020 Blue Shoes-Google-Nurture
Display-2020 Pink Shorts-Google-Conversion

Something like the above example would be easy to parse out and analyze. The problem with this: it doesn't always make sense from a process standpoint. This is why holding on to the idea of these "consistent" tracking codes can sometimes do more harm than good. You need to be able to shift your way of thinking and focus on a standardized approach.

Shifting Your Focus to Standardized Tracking Codes

The key to finding success with your tracking codes is to first determine what it is that you are trying to achieve with your taxonomy. Ask yourself the following questions about what it is that you are trying to achieve.

- Do we want to obfuscate my tracking codes to shorten our URLs and avoid losing tracking?
- Have we run into issues where proprietary information has been in the final URL that users see (like demographic or age targeting)?
- Do we have limited visibility in reporting and a need to enrich our data?
- Do we want to help streamline the tagging workflow for marketers so they're more keen to adopt and follow the established taxonomy?

If you answered "yes" to any, or all, of these questions, then you don't need to be obsessing over consistency tracking code taxonomy. It's time to shift your focus to standardized tracking codes instead. While tracking codes themselves are critical, it's not necessary to have them appear exactly the same across all channels. This will only limit you.

What Are the Critical Components of Tracking Codes?

It isn't necessary for tracking codes to be exactly the same in order to be effective. Yet the term "consistent" is often thrown around when it come to tracking codes. Consistent does not mean everything needs to be organized identically. Instead it is important that tracking codes are *applied* consistently, or applied using the same *standard*. It's also important that the data being associated with these tracking codes meets the same standard.

What's important is that tracking codes make sense. This is far more important than having them all look the same. The goal should be for these tracking codes to leverage the features of various platforms together to help you achieve your goals.

You shouldn't go into this process thinking you need to fit a circle in a square. Tracking codes can still meet the same standards, yet *look* inconsistent to meet their distinct environments.

Consistency is also subjective. For example, a standard obfuscated tracking code taxonomy may look something like this:

Taxonomy: [channel code]-[country code]-[random number]-[random string]
Sample Value: **EM**-US-74-LGYEGGSVA

This taxonomy will vary based on the channel. For example, the above sample would be for **email**. However, that taxonomy will change slightly when used for Facebook campaigns, specifically to leverage Facebook's macros. So, the same taxonomy for Facebook would look something like:

Taxonomy: [channel code]-[country code]-[FB campaign ID]-[FB adset ID]-[FB ad ID]
Sample Value: SOC-US-3465678-3894758-9874875

You can see the taxonomy for Facebook isn't exactly the same as (consistent with) the taxonomy used for email, but it still has a similar beginning and meets the same standard. In the end this is the best way to leverage the data you have available, while making the marketer's job easier.

This example is a fairly standard tracking code. A lot of times, especially in Adobe Analytics, Marketing Channel Processing Rules are configured to look at the beginning of the tracking code to determine which channel to bucket a hit into. This is one of the main reasons it is always smart to stick with the structure above.

Establishing Your Taxonomy

When establishing your taxonomy, you should always keep your overall goals at the forefront of your decisions. Determine what you are trying to achieve and then focus on the technical impact.

Are there dependencies in downstream reporting you need to consider? What is the impact with that change? How do you plan to accommodate or remediate it?

It's OK if there is an impact, you just need to understand what that impact is and have a plan in place to remedy it. If it's something that you can fix by reclassifying your legacy data, then it is typically the right choice to try to remedy the situation instead of scrapping it all together.

Once this is done, you can move forward with your "global" tracking code taxonomy as the initial recommendation:

[channel code]-[country code]-[random number]-[random string]

Then, after discovery sessions with the stakeholders, evaluate if you're trying to fit a circle into a square or if this approach makes sense (we will talk more about discovery sessions later). Determine if there are platform specific codes you can use as the obfuscated portion. Would that make this more seamless or does a global structure work?

It varies with each organization, with each channel, with each team, and with each platform. There is no silver bullet. You must be willing to have conversations after the initial proposal and work from there.





Evaluating The Data You Want to Capture

Now that you have determined what the taxonomy will look like, it's time to evaluate the data you want to capture. This is the most time-consuming part of the process. Remember, to do this effectively, it should take time.

Evaluating your data requires a lot of conversations, people, and opinions, but the outcome is worth it. You may already have an idea of what data you want to capture, but it's important to get the necessary teams involved from the start.

Start with your initial list of the data fields you see as necessary and then take the following steps to gather all the information required to make decisions about your metadata fields.

Identify Key Stakeholders

The first step in making important decisions with your metadata fields is to identify the key stakeholders. Start by identifying who owns each channel. Then identify if there is an external partner, such as an agency or a vendor, that manages that channel.

Don't forget about business intelligence (BI) teams. They're often separate from analytics but should be included as a stakeholder in the conversations. While we typically think of stakeholders as marketing channel owners, BI or reporting teams can be impacted by a change in tracking code structure and they should be included in this process to help identify any areas of concern.

You can determine this by asking internally, "do we have reporting outside of our analytics environment (such as Tableau or Snowflake) that leverages data from our analytics platform?"

If the answer is "yes," you'll want to schedule a discovery session with the team that owns that process to discuss their requirements and the proposed changes to the data fields and taxonomy. Worry not, it can all be seamlessly connected.

Schedule Discovery Sessions

The next step in the process is to schedule discovery sessions to start getting a feel for what it is you want to capture in your taxonomy. The discovery session is all about asking the right questions and getting the answers you need to move forward.

These questions include the following

1. What platforms are you using?
2. Are there platform requirements for the tracking codes?
3. What is the current workflow?
4. What is the current taxonomy?
5. What fields do you currently capture?
6. What fields do you want to capture?
7. What dimensions do you currently report on?
8. What dimensions do you wish you could report on?
9. Is there a reporting dependency we're unaware of?
(i.e. is the agency providing any reporting that is dependent on the tracking code structure?)

The more detailed and honest about your answers, the better your results will be. The more information you can gather in these initial sessions, the more helpful they will be down the line.

Define Core Business Fields

After you host discovery sessions with the various stakeholders, take all of the information you've gathered and draw parallels between the channels to try and find any areas of consistency.

Consider this example:

If the Email Campaign Name is being captured by the Email Team and Google Campaign Name is being captured by the Display Team, you have an opportunity to combine these in one field called “Platform Campaign Name.”

However, with this example there will likely be inconsistencies based on how different teams decide to name their campaigns.

There are two solutions to navigating this issue and defining the core business fields.

Option 1

Create a core field called “Business Campaign Name” which is a set, universal picklist of the business-defined campaign names. This list could be generated from your project management tool (i.e. Workfront) or something the analytics team manages on an ongoing basis.

The goal here is to create consistency so that in your reporting, you can pull a report for 2020 Q1 Retention and break out performance by every channel seamlessly.

Option 2

Make “Platform Campaign Name” a concatenated field where it gets created as the users are inputting values to generate the tracking code. This tactic creates consistency in the naming convention. However, you will not get the level of consistency you would with Option 1.

This part of the process is where you ask yourself, what type of reports do I get asked for/what views do I get asked for most frequently?

Some businesses find high value in pulling reports based on overarching campaigns, others find value in pulling them by budget allocation (i.e. regional versus global).

Once you've identified all of the parallels, the remaining fields are truly channel specific. For example, "Link ID" is a common field for email tracking that is not something found in other channels. "Keyword" is something that is relevant for paid search, but not other channels.

It's OK to have channel-specific fields, it's inevitable. Channel-specific fields simply mean that when you want to pull a report, you don't need to see a report for that specific field across various channels. You would use those fields to analyze and optimize within a channel.

Create a "Data Dictionary"

Once you've determined the core business fields and the channel-specific fields, it's time to create a data dictionary. This can be an Excel or a Google Sheet. The goal here is to get the outline established to then review with the teams.

Here's a simple way to organize it:

- 1 In the left-most column, list out your different channels.
- 2 In the headers of the subsequent columns, list out the core business fields.
- 3 Under each header, fill out what the input values are by channel.

Once you've filled out the input values for the core fields by channel, make a note of the channel-specific fields and their associated input values.

Reviewing and Presenting Your Data Dictionary

Once you have your data dictionary it's time to review your proposed new outline with your various teams. The goal is to align on input values. You want to make sure that the values are relevant to each of the teams while identifying if any values can be preset or filtered.

This will be a more collaborative process that will hopefully help clean up and narrow down your proposed data outline into a solution that works for everyone.

Implementing Your New Taxonomy

Once your different teams have signed off on your proposed outline, it's time to implement your new taxonomy. Create a tracking code builder template for each team. This is typically a better approach than creating a master taxonomy document because you can customize it to meet every team's needs.

For example, for the social taxonomy template publishers, the available input values would only be social media platforms rather than having a long list of all possible input values regardless of channel. This will help keep things more organized for everyone involved.

Launch

While it takes a great deal of time and effort to get to this point, it's now time to deploy your taxonomy!

However, that doesn't mean your work is over.



Marketing Taxonomy Checklist



1. Identify Key Stakeholders



2. Schedule Discovery Sessions



3. Define Core Business Fields



4. Create a Data Dictionary



5. Review and Present Your Data Dictionary



6. Implement Your New Taxonomy



7. Launch



Considerations For Your New Marketing Taxonomy

While your new marketing taxonomy may be up and running, there are still a few considerations to keep in mind. And you may need to tweak or adjust the taxonomy to fit your company's unique and evolving situation.

Legacy Data

Many times, when you're revamping your tracking code taxonomy and metadata fields, there's concern around the transition. You're moving away from the legacy tracking codes that are inconsistent, nearly impossible to decode, and that have little to no metadata. Instead, you're relying on a newly standardized tracking code with a wealth of metadata.

Some organizations choose to cut their losses and take the "out with the old, in with the new" approach, while others do not have that luxury. Many times, they're instead dependent on year-over-year reporting. In these situations, it may be best to re-classify legacy data and make the following decisions.

- Do you keep the legacy tracking codes on anything in-market and anything new you "launch" will use the new taxonomy?
- Do you re-classify all in-market tracking codes AND update in-market campaigns with the new tracking codes?

If you chose to reclassify legacy data, you will need to partner with all of the channel stakeholders to pull the legacy tracking codes and define their values for the new metadata fields. Lean on your partners or agencies to decode the tracking codes. After all, they're the ones that launched the campaigns and defined that previous taxonomy, meaning they should be able to decode it.

Analytics and Report Implications

Make sure to ask yourself the following questions about your analytical implications once your taxonomy has launched:

- Are there rules/logic configured in my web analytics platform that is dependent on the taxonomy?
- Are there segments configured to be dependent on the taxonomy or data fields?
- Are there reports that are configured to be dependent on my data fields/taxonomy?

You should also ask yourself if there are any reports that are configured to be dependent on your data fields or taxonomy. These could be internal reports in data platforms like Power BI, Tableau, Snowflake, or external reports from vendors/agencies.

This is an important consideration while moving forward with your new taxonomy.

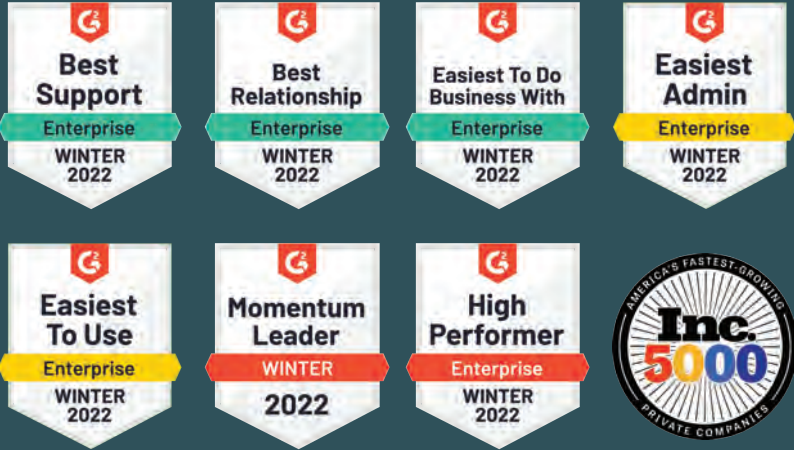
Remember, there are a lot of considerations you will need to make when building a taxonomy that suits your organization best.

Even once you've launched, tweaks, changes, or re-classifications may be necessary in order to keep your system as efficient as possible.

Claravine is a leading data integrity platform that helps standardize, govern, and connect data across every team, system, and channel.

Top global brands use Claravine to centralize content and campaign data structures while governing the process of generating, validating, and connecting data. This supercharges data strategies for optimal digital experiences across enterprise and customer touchpoints.

The benefits are richer insights, experiences, and ROI from marketing, content, analytics, and advertising investments.



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