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Fred Leise—Taxonomy Design and User Research

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Overview

Significant expertise in taxonomy creation, including B2C and retail product taxonomies, as well as user research developed over 20 years as an independent consultant, freelance indexer, and manager of a corporate taxonomy team.

Professional Experience

20013– *Senior Taxonomist,* K Street Partners. Taxonomy development and consulting. Clients have included:

- Development of complete faceted product taxonomy for online Caribbean vacation company
- Creation of faceted games taxonomy for B2B gaming company
- Development of faceted taxonomy for B2B S&P 500 software compay
- Development of retail product taxonomy for a B2C skincare company

2001– *Owner and Principal, ContextualAnalysis.* Taxonomy and information architecture consulting. Clients have included:

- American Mathematical Society: navigation taxonomy and information architecture consulting (user research, including card sorting, user interviews and stakeholder interviews; website content organization; taxonomy revisions)
- Disney Studios: taxonomy consulting for DisneyDVD.com
- Scripps Newspapers: taxonomy consulting for HGTV.com, FoodNetwork.com and DIY.com
- Harpo Productions: taxonomy development project for Oprah.com redesign project, including developing and implementing user research protocol, content analysis and report documents
- Abbott Laboratories: information architecture and navigation taxonomy for internal library portal; metadata and controlled vocabularies for digital asset management tool
- Accenture: Employee portal careers section redesign testing; Accenture.com redesign user testing moderation, analysis and reporting; controlled vocabulary development for Accenture.com
- Dow Corning: metadata and controlled vocabulary development for 7,000-product website redesign
- Hewlett-Packard: strategy and recommendations for employee intranet information architecture, including taxonomy revisions (user interviews, card sorting)

2009–2012 *Manager, Taxonomy Team, Sears Holdings Corporation* (managed team of 10 individuals responsible for browsing hierarchies for Sears.com, Kmart.com, Craftsman.com, Kenmore.com, as well as product attributes and attribute values)

- Reviewed and improved user research protocols for taxonomy design projects
- Conducted stakeholder and user interviews, as well as in-person and remote user testing sessions
- Analyzed user testing results from card sorts, and directed and non-directed tasks' prepared user testing reports and developed presentations to stakeholders
- Performed heuristic evaluations and competitive analyses
- Oversaw maintenance of product taxonomies for 9 public websites and internal content management systems
- Created and documented taxonomy design and implementation processes
- Wrote taxonomy style guide and taxonomy software user guide

2000–2001 *Argus Associates, Inc., Information Architect*

1995– *Freelance back-of-book indexer*

- Analyze content and user needs, and prepare back-of-book indexes for scholarly and trade books and journals, including embedded indexes using InDesign.
- Clients included such publishers as Georgetown University Press, Peachpit Press, Oxford Univ. Pr., Columbia Univ. Pr., O'Reilly Publishers, Cambridge Univ. Pr., Rutgers Univ. Pr., University of Chicago Press

2008– *Instructor*

- University of California, Berkeley, Extension Division course in indexing.

1974–2002 *Arts Manager*

- On administrative staff of Baltimore Symphony; Buffalo Philharmonic; Albany Symphony; Waverly Consort; Music of the Baroque, Chicago; Newberry Consort

User Research Techniques

Stakeholder interviews; user interviews; interview script development; card sorting development and analysis (both remote and in person); mental model inquiries; user task testing, both online and in person; product finding tasks; taxonomy testing; non-directed user observations; development of screeners for user research

Awards

Australian Society of Indexers Web Site Index Award(for site index to www.peoplesoft.com, available at http://www.contextualanalysis.com/PeopleSoft_site_index.asp.html)

Finalist for 1997 American Society for Indexing/H.W. Wilson Award for excellence in indexing

Education

Bachelor of Science in Mathematics, University of Maryland at College Park
Certificate in the Publishing Program, The University of Chicago

Presentations and Workshops (selected list)

"Specificity and Granularity," American Society for Indexing (ASI) national conference, June 2016

"Creating Brilliantly Structured Indexes," ASI online course, November 2016

 "Successful Subheadings," ASI national conference, April 2013

"Taxonomy Design for the Short on Time," Special Libraries Association, July 2012 and American Society for Indexing, April 2013

"Cookbook Indexing," full-day workshop, Chicago/Great Lakes Chapter, American Society for Indexing, November 2009

"Last But Not Least: Managing the Indexing Process," two-day workshop, University of Chicago Graham School of General Studies, Editing certificate program, October, 2009

 "Introduction to Controlled Vocabularies," (British) Society of Indexing national conference, Winchester, England, July 2008

"Building Advanced Taxonomies: Methodology and Analysis Techniques," IA Summit, March 2007

"Advanced Taxonomy: Plan, Design, Build," 3-day workshops for D. Z. Hampton, presented in Brunei Darussalam and Kuala Lumpur, Malaysia, September 2006

"Introduction to Information Architecture and Usability," half-day workshop, Special Libraries Association national conference, June 2006

"Introduction to Metadata and Controlled Vocabularies," full-day workshop, ASI national conference, May 2005

"Enabling Content Management Systems Through Metadata and Controlled Vocabularies," half-day workshop, Information Architecture (IA) Summit, March 2005

"Building a Faceted Classification," IA Summit presentation, March, 2005, with Amy J. Warner and Sarah A. Rice

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Publications (selected list)

"Pan-granularism and specificity," in *The Indexer,* Vol. 34, No. 4, December 2016

"Successful subheadings," in *The Indexer,* Vol. 31, No. 4, December 2013

" 'And So to Bed': The index to *The Diary of Samuel Pepys*," in *The Indexer,* Vol. 29, No. 1, March 2011

"Indexing in the Electronic World" in *Starting an Indexing Business,* 4th ed. Information Today, Inc., Medford, NJ, 2009.

Indexing Specialties: Cookbooks. Co-editor with Alexandra Nickerson and Terri Hudoba. Information Today, Inc., Medford, NJ, 2009.

"Controlled Vocabularies: An Introduction," in *The Indexer,* Vol. 26, No. 3, September 2008.

Indexing for Editors and Authors: A Practical Guide to Understanding Indexes. Co-author with Kate Mertes and Nan Badgett. Information Today, Inc., Medford, NJ, 2008.

"Content Analysis Heuristics" in BoxesandArrows.com, 2007. Available at: http://boxesandarrows.com/view/content-analysis.

"Metadata and Content Management Systems: An Introduction for Indexers," *The Indexer,* Vol. 24, No. 4, October, 2004.

"Controlled Vocabularies" A Glosso-Thesaurus," in BoxesandArrows.com, October 2003, with Karl Fast and Mike Steckel. Available at: http://boxesandarrows.com/controlled-vocabularies-a-glosso-thesaurus/

 "Creating a Controlled Vocabulary," in BoxesandArrows.com, April 2003, with Karl Fast and Mike Steckel. Available at: http://www.boxesandarrows.com/creating_a_controlled_vocabulary/

"What is a Controlled Vocabulary?" in BoxesandArrows.com, December 2002, with Karl Fast and Mike Steckel. Available at: http://www.boxesandarrows.com/what_is_a_controlled_vocabulary_/

"All About Facets and Controlled Vocabularies," in BoxesandArrows.com, December 2002, with Karl Fast and Mike Steckel. Available at: http://www.boxesandarrows.com/all_about_facets_controlled_vocabularies/

Professional Memberships

- Information Architecture Institute, Member, 2002–2012
- American Society for Indexing
    President, 2015–2016; 2008–2009
    Board member, 2015–2018; 2004–2006; 1997–1998
    Member, 1995–