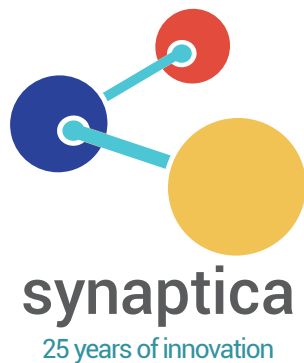


Checkatrade



# Big Data, Small Teams

## Scaling a Taxonomy Team



**Bonnie Bowes**  
Checkatrade

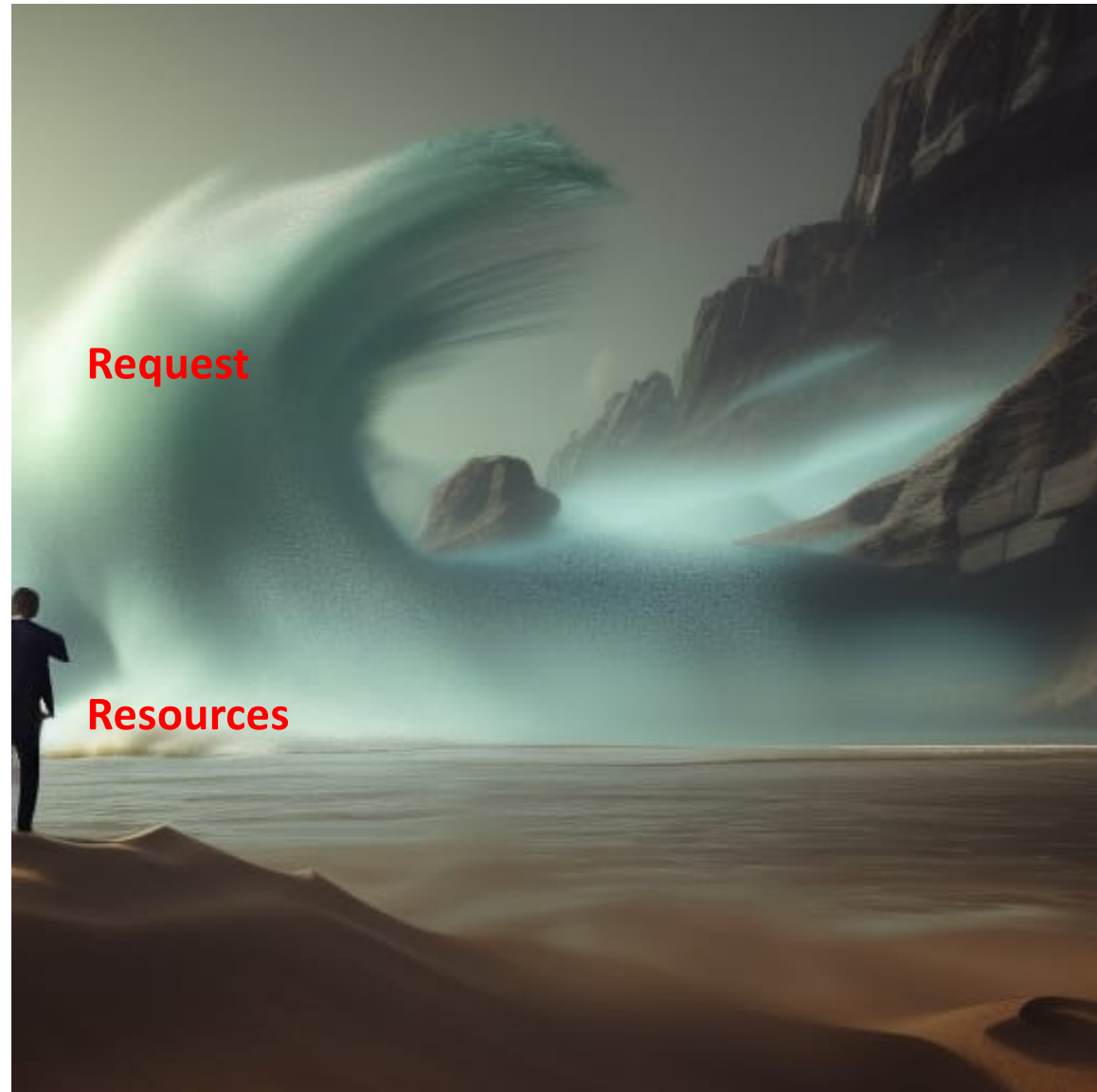


**Sarah Downs**  
Synaptica



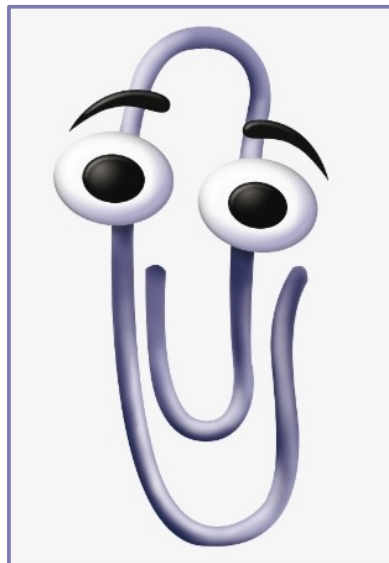
## A case study

1. The Problem & Opportunity
2. Getting the Greenlight
3. Tooling Investment
4. Effort Estimation
5. Rapid, Targeting Hiring
6. Measuring Progress
7. Harnessing Technology
8. Solution & Outcomes
9. Q&A





Say, how long  
would it take  
you to  
'taxonomize'  
300,000 random  
terms? A  
month?



0 taxonomy  
tooling



## Get the Greenlight to invest in the resources you need to succeed and scale



Resist the temptation to please by saying yes

Set a precedent for realistic expectations

The power of saying no, and no, and no again

The even greater power of saying “Yes, and...”

## Know (or learn) how to get things done

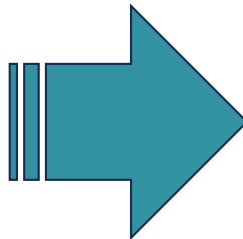


- Lead the solution
- Leverage colleagues' experience
- Exhaust alternative approaches
- Business case for why it matters
- Find out how things are done
- Use decisionmaker metrics
- Rally supporters to the cause



# Investment in Tooling

| Concept | Label   | Action                |
|---------|---|-----------------------|
| 1       | http://www.eion.aquatic environment                 | Modify Property Value |
| 2       | http://www.eion.cooling water                       | Modify Property Value |
| 3       | http://www.eion.drinking water                      | Modify Property Value |
| 4       | http://www.eion.hot water                           | Modify Property Value |
| 5       | http://www.eion.mineral water                       | Modify Property Value |
| 6       | http://www.eion.process water                       | Modify Property Value |
| 7       | http://www.eion.spring water                        | Modify Property Value |
| 8       | http://www.eion.raw water                           | Modify Property Value |
| 9       | http://www.eion.water for agricultural use          | Modify Property Value |
| 10      | http://www.eion.water for consumption               | Modify Property Value |
| 11      | http://www.eion.water for industrial use            | Modify Property Value |
| 12      | http://www.eion.water (substance)                   | Modify Property Value |
| 13      | http://www.eion.water endangering                   | Modify Property Value |
| 14      | http://www.eion.water salination                    | Modify Property Value |
| 15      | http://www.eion.water damage                        | Modify Property Value |
| 16      | http://www.eion.water extraction                    | Modify Property Value |
| 17      | http://www.eion.water resource                      | Modify Property Value |
| 18      | http://www.eion.water utilisation                   | Modify Property Value |
| 19      | http://www.eion.exploitation of underground water   | Modify Property Value |
| 20      | http://www.eion.aquatic recreational amenity        | Modify Property Value |
| 21      | http://www.eion.hydraulic construction              | Modify Property Value |
| 22      | http://www.eion.hydroelectric power plant           | Modify Property Value |
| 23      | http://www.eion.municipal water distribution system | Modify Property Value |
| 24      | http://www.eion.urban water                         | Modify Property Value |
| 25      | http://www.eion.waste water treatment plant         | Modify Property Value |
| 26      | http://www.eion.water distribution system           | Modify Property Value |
| 27      | http://www.eion.waterlogged land                    | Modify Property Value |
| 28      | http://www.eion.water purification plant            | Modify Property Value |
| 29      | http://www.eion.waterside development               | Modify Property Value |
| 30      | http://www.eion.waterway                            | Modify Property Value |
| 31      | http://www.eion.water well                          | Modify Property Value |
| 32      | http://www.eion.waterworks                          | Modify Property Value |
| 33      | http://www.eion.water mill                          | Modify Property Value |
| 34      | http://www.eion.storm water basin                   | Modify Property Value |
| 35      | http://www.eion.rain water sewer system             | Modify Property Value |
| 36      | http://www.eion.bathing water                       | Modify Property Value |
| 37      | http://www.eion.international watercourse           | Modify Property Value |
| 38      | http://www.eion.municipal water management          | Modify Property Value |
| 39      | http://www.eion.sea water protection                | Modify Property Value |
| 40      | http://www.eion.waste water quality                 | Modify Property Value |
| 41      | http://www.eion.water conservation                  | Modify Property Value |
| 42      | http://www.eion.water demand                        | Modify Property Value |
| 43      | http://www.eion.water management                    | Modify Property Value |
| 44      | http://www.eion.water management                    | Modify Property Value |



### Concept Manager

Hierarchy Collections Saved Queries Search Results

Total Concepts Found: 4562

Grouped View

[GEMET Thesaurus](#)

- abandoned industrial site
- abandoned vehicle
- abiotic environment
- abiotic factor
- above-ground biomass
- above-ground biomass growth
- above-ground non-tree biomass
- above-ground tree biomass
- absorption (exposure)
- acceptable daily intake
- acceptable risk level
- access road
- access to administrative documents
- access to culture
- access to information
- access to the courts
- access to the sea
- accident
- accident source
- accidental release of organisms
- accounting
- accounting system
- accumulation in body tissues
- accumulator
- acid
- acid deposition
- acid rain
- acidification
- acidity
- acidity degree
- acoustic comfort
- acoustic filter
- acoustic insulation
- acoustic level
- acoustic property
- acoustical quality
- acoustics
- act
- actinide
- actinium
- action group
- activated carbon
- activated sludge
- active participation
- active population
- adaptable species
- adaptable species

[Save Query and Report](#)
[Batch Edit Search Results](#)

Graphite XOS © 1999-2022 by Synaptica 1.0.1

### Batch Editor

List of Concepts for Batch Editing

Search

[abandoned industrial site](#)
[abandoned vehicle](#)
[abiotic environment](#)
[access to administrative documents](#)
[access to culture](#)
[access to information](#)
[access to the courts](#)
[access to the sea](#)
[accident](#)
[accident source](#)
[accidental release of organisms](#)
[accounting](#)
[accounting system](#)
[accumulation in body tissues](#)
[accumulator](#)
[acid](#)
[acid deposition](#)
[acid rain](#)
[acidification](#)
[acidity](#)
[acidity degree](#)
[acoustic comfort](#)
[acoustic filter](#)
[acoustic insulation](#)
[acoustic level](#)
[acoustic property](#)
[acoustical quality](#)
[acoustics](#)
[act](#)
[actinide](#)
[actinium](#)
[action group](#)
[activated carbon](#)
[activated sludge](#)
[active participation](#)
[active population](#)
[adaptable species](#)

[Resource Types](#)
[SKOS Concept](#)

[Templates](#)
[SKOS](#)
[XOS](#)

[Collections](#)

[has broader \(SKOS\)](#)
[has narrower \(SKOS\)](#)
[has related \(SKOS\)](#)
[has exact match \(SKOS\)](#)
[has close match \(SKOS\)](#)
[has broader match \(SKOS\)](#)
[has narrower match \(SKOS\)](#)
[has related match \(SKOS\)](#)

> acidity +

> acidity degree +

> acoustic comfort +

> acoustic filter +

> acoustic insulation +

> acoustic level +

> acoustic property +

> acoustical quality +

> acoustics +

> act +

> actinide +

> actinium +

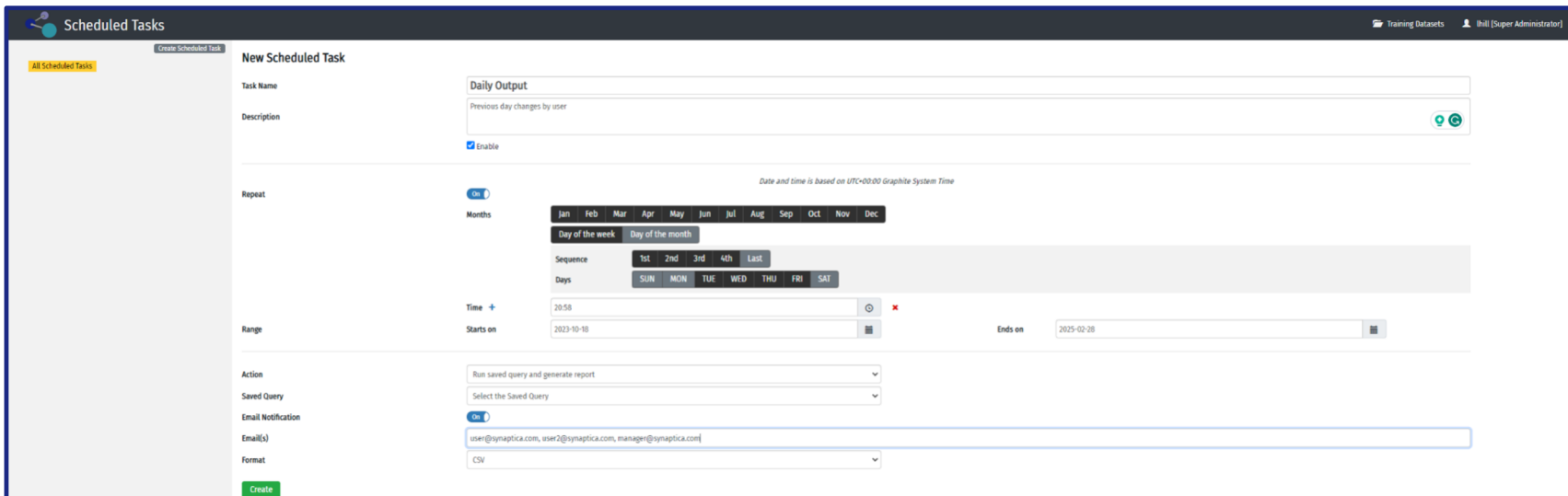
> action group +

> activated carbon +

acoustic property +

# Effort Estimation

➤ How long will it take?



**Scheduled Tasks**

[All Scheduled Tasks](#) [Create Scheduled Task](#)

**New Scheduled Task**

Task Name:

Description:

☒ Enable

Repeat:  Date and time is based on UTC+00:00 Graphite System Time

Months:

Day of the week:

Days:

Time:

Range:

Action:

Saved Query:

Email Notification:

Email(s):

Format:

**Daily output per taxonomist** = (average daily output / # of taxonomists), averaged over time

**Business days required** = Total output required / (Daily output per taxonomist \* # of taxonomists)

## Assembling the dream team: Rapid, targeted hiring



### **Tailored job description**

what do you really  
need?



### **Network recruitment**

personal, professional,  
educational, agencies



### **Structured Interviews**

customized  
assessment  
to reduce bias



### **Interview assignment**

directly assess  
relevant job skills



## Scaling quality across the team



### Training

Documented workflows, progressive learning sequence, audited early work



### QC

Peer review, inter-rater and intra-rater agreement



### Let the team run

Enable specialization  
Define clear workstreams and swim lanes  
Measure progress

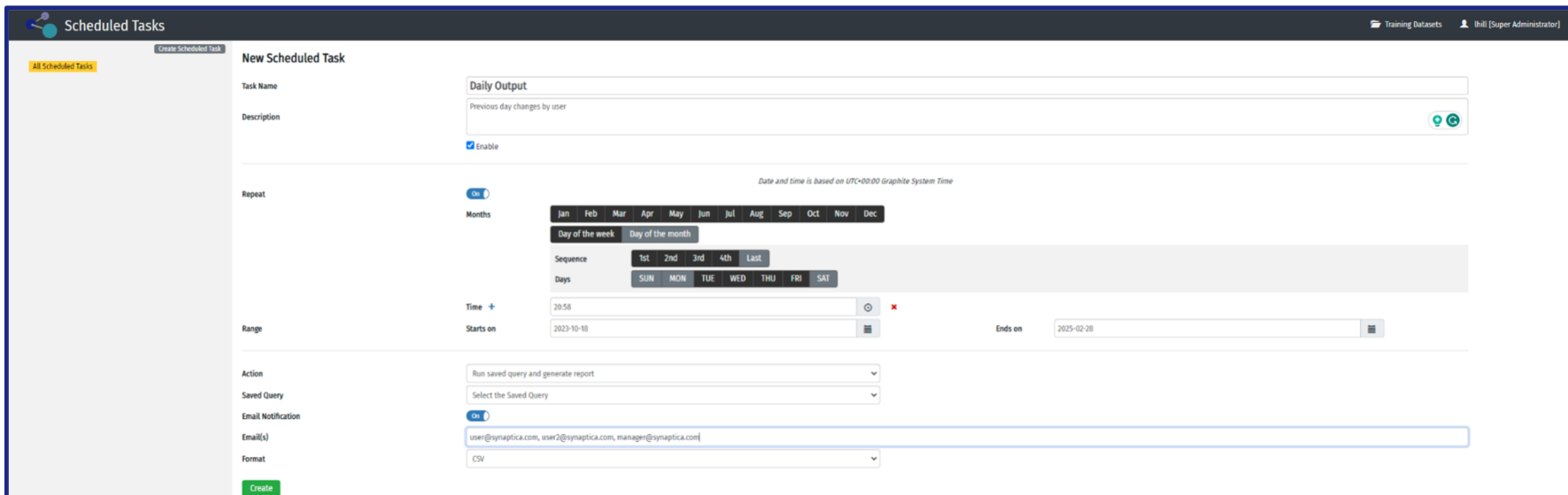


### Have fun

Setup systems for collaboration

# Measuring Progress

- Are we on track? Were our original estimates correct?
- How can we go faster (what can we learn from each other)?



The screenshot shows the 'Scheduled Tasks' interface in Synaptica. The 'New Scheduled Task' form is displayed with the following details:

- Task Name:** Daily Output
- Description:** Previous day changes by user
- Enable:** ☒
- Repeat:** ☒
  - Months:** Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec
  - Day of the week:** SUN, MON, TUE, WED, THU, FRI, SAT
  - Sequence:** 1st, 2nd, 3rd, 4th, Last
  - Time:** 20:58
  - Starts on:** 2023-10-18
  - Ends on:** 2025-02-28
- Action:** Run saved query and generate report
- Saved Query:** Select the Saved Query
- Email Notification:** ☒
- Email(s):** user@synaptica.com, user2@synaptica.com, manager@synaptica.com
- Format:** CSV

A green 'Create' button is at the bottom left of the form.

Business days remaining = Total output required - [Total output required / (Daily output per taxonomist x # of taxonomists)]

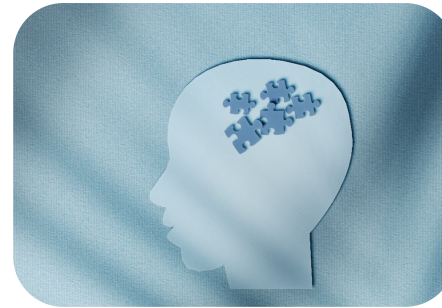
# Flipping the technology script



Avoid repetitive,  
manual tasks



Batch tasks



Make the best use  
of human  
Intelligence



Challenge  
assumptions  
& practices

## Solution & Outcomes



7 taxonomists



65k term  
hierarchy



Professional  
taxonomy  
tooling



Risk mitigation  
response:  
Hours instead  
of months

**Finished taxonomy on-time!**


**Managed risk**

**Upskilled taxonomists**

**Colleagues for life**

## Meta plans to remove thousands of sensitive ad-targeting categories.

Ad buyers will no longer be able to use topics such as health, race or sexual orientation to target people with unwanted ads on Facebook or other Meta apps.

 Share full article



Meta said its changes, intended to limit abuse by its targeting tools, will take effect on Jan. 19. Jim Wilson/The New York Times



By Mike Isaac and Tiffany Hsu

Published Nov. 9, 2021 Updated Nov. 10, 2021

## Recap



Say no or “yes, and”



Invest in tooling



Employ metrics-driven thinking for business case development and progress monitoring



Design tailored hiring systems (reduce bias)



Invest in training and quality reviews – initial and ongoing



Enable the team to succeed in parallel



Leverage technology and put taxonomists to their highest and best use

Thank  
You

## Synaptica



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<https://www.synaptica.com/>



<https://www.twitter.com/synaptica>



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