**Amalgamated Bank Taxonomy**

|  |  |
| --- | --- |
| **Purpose of the taxonomy:**  Users have different goals and behaviors; therefore, they navigate to, browse, and discover content in different ways. A robust content taxonomy provides a formal set of ways that content can be categorized, and aids in content discovery.  **Goal of the document:**  To categorize, and classify all content on AmalgamatedBank.com by defining all the different tags that can be used to categorize content. Content categories will be used to   * Establish navigation * Create relationships and display related content * Filter content   **Next steps:**  Amalgamated to review validate, and update taxonomy. | |
| **Today’s Date** | **06/16/2017** |

## **Tags**

The following is a list of tags that will be used in the site ecosystem. Tags will be applied to various content types within the CMS to enable related content and filtering.

### Role

Sections of the site.

* Personal (banking)
* Organizational (banking)
* Business (banking)
* Commercial Lending
* Institutional Investing

### Product Type

Products and services available on the site.

* Personal Banking
  + Checking
  + Savings and CDs
  + Credit Cards
  + Mobile Banking
* Personal Borrowing
  + Mortgages
  + HELOC (Home Equity Line of Credit)
* Personal Investing
* Business Banking
  + Business Checking
  + Business Savings
  + Business Credit Cards
  + Business Mortgages
  + Mobile Banking
* Commercial Lending
  + Commercial and Industrial
  + Commercial Real Estate
  + Community Development (?)
  + Non-profit Lending
  + Custody Services (?)
* Institutional Investing
  + Equity
  + Fixed Incomes
  + Alternatives
  + QPAMs
  + Investment Management (?)
  + Custody Services (?)

### Organization Type

Organizations we want to promote. Tags will be used to bring stories, case studies, blogs, etc. to the organization landing page.

* Environmental
* Political
* Unions
* Philanthropic
* Non-Profit
* Socially Conscious Businesses

### Media Type

* Blog Post
* Case Study
* Client / Customer
* News
  + Press Release
  + Mention (3rd Party News About Amalgamated Bank)
  + Article
* Story (example: Impact Report)

### Topic

Topics will be used in addition on blogs and case studies to add a level of granularity to blogs and case studies that is more specific than organizations.

* TBD
* (example) Doing Good
* (example) Move your Money
* (example) Investing
* (example) Real Estate
* (example) Online Banking
* (example) Worker’s Rights, Fair Pay

## **Template Types**

The following is a list of templates (content types) that will appear with the Amalgamated Bank ecosystem. Attributes define what is necessary to create a content type. Tags define which tags can be applied to a content type. Related describes what the content type can be related to, and the order of tags to cycle through to define the appropriate related content to display.

### Home Page

Attributes

* Name
* Featured carousel items
* Log in to online banking
* Natural language Quiz
* Links to Role Home Pages
* Why Amalgamated Key Points
  + Description
* Sign up for newsletter

Tags

Content Display Rules:

* Displays featured Products based on role, and product type (editorially defined)
* Displays related news and stories based on role, topic, then most recent

### Product Landing

Attributes

* Name

Tags

* Role
* Product Type

Content Display Rules:

* Displays related Products based on role, and product type

### Product List

Attributes

* Name
* Description
* Contact Us
  + (If applicable) Person
  + Image
  + Contact Info
  + Mailto: link
  + Find a location
* Sign up for newsletter

Tags

* Role
* Product Type

Content Display Rules:

* Displays related Products based on role, and product type
* Displays related news and stories based on role, topic, then most recent

### Product Detail

Attributes

* Name
* Description (About This Product)
* (if applicable) additional product details
  + Name
  + Description
* Image
* Contact Us
  + (If applicable) Person
  + Image
  + Contact Info
  + Mailto: link
  + Find a location
* Apply
* Key Point Name
  + Key Point Description
  + Key Point Image
* Sign up for newsletter

Tags

* Role
* Product Type

Content Display Rules:

* (if applicable) Displays related organization
* (If applicable) Displays related product, by role, and product name
* Displays related news and stories based on role, topic, then most recent

### Segment Landing

Attributes

* Name
* Description
* Pull Quote
* Image
* Why Amalgamated Key Points
  + Description
* Sign up for newsletter

Tags

* Role
* Organization Type

Content Display Rules:

* Displays organizations
* Displays related products based on role, and organization type

### Segment Detail

Attributes

* Name
* Description
* Image
* Contact Us
  + (If applicable) Person
  + Image
  + Contact Info
  + Mailto: link
* Expert
  + Bio
  + Image
  + Contact Info
* Key Points
  + Description
  + Image
* Customers
  + Name
  + Logo
* Why Amalgamated Key Points
  + Description
* Sign up for newsletter

Tags

* Role
* Product Type

Content Display Rules:

* (If applicable) Displays related product, by organization type, or role
* (editorially defined) Featured case study, by organization type, or role
* Displays related news and stories based on organization type, or role, topic, then most recent
* (editorially defined) Featured story based on organization type, or role

### All Case Studies

Attributes

* Name
* Description
* Image
* Sign up for newsletter

Tags

* Role
* Organization Type

Content Display Rules:

* Displays featured case study (editorially defined)
* Displays related case studies based on role, and organization type

### Case Study Detail

Attributes

* Title
* Date
* Intro Paragraph
* Key Takeaways
* Image
* Body Text
* Pullquotes
* Body Images (Infographic/Other image)
* Thumbnail image
* Short Description
* Sign up for newsletter

Tags

* Media Type
* Author (?)
* Role(s)
* Organization Type
* Product Type
* Topic(s)
* Featured? Yes/No

Related:

* Displays related organization page, by organization type
* Displays related case study, by organization type, and topic

### Blog

Attributes

* Name
* Description
* Image
* Sign up for newsletter

Tags

Content Display Rules:

* Displays featured blog post (editorially defined)
* Displays related blog posts
* Displays popular blog posts

### Blog Post

Attributes

* Title
* Date
* Intro Paragraph
* Image
* Body Text
* Pullquotes
* Body Images (Infographic/Other image)
* Thumbnail image
* Short Description
* Author
  + Person
  + Title
  + Image
  + Contact Info
  + Mailto: link
* Sign up for newsletter

Tags

* Media Type
* Author
* Role(s)
* Organization Type
* Product Type
* Topic(s)
* Featured? Yes/No

Content Display Rules:

* Displays related organization page, by organization type
* Displays related blog posts, by organization type, or role, and topic
* Displays related products, by organization type, or role

### News List

Attributes

* Name
* Description
* Image
* Sign up for newsletter

Tags

* Role
* Organization Type

Content Display Rules:

* Displays featured news item (editorially defined)
* Displays related news items

### News Detail

Attributes

* Title
* Date
* Intro Paragraph
* Key Takeaways
* Image
* Body Text
* Pullquotes
* Body Images (Infographic/Other image)
* Thumbnail image
* Short Description
* Sign up for newsletter

Tags

* Media Type
* Author (?)
* Role(s)
* Organization Type
* Product Type
* Topic(s)
* Featured? Yes/No

Content Display Rules:

* Displays related news, by organization type, or role, and topic
* Displays related products, by organization type, or role

### Story List

Attributes

* Name
* Description
* Image
* Sign up for newsletter

Tags

* Role
* Organization Type
* Topic

Content Display Rules:

* Displays related stories
* Displays related blog posts, by role, organization type, and topic
* Displays related customers, by organization type

### Story Detail (see Case Study Detail)

Attributes

* Title
* Date
* Intro Paragraph
* Image
* Body Text
* Pullquotes
* Body Images (Infographic/Other image)
* Thumbnail image
* Short Description
* Customer
* Author
  + Person
  + Title
  + Image
  + Contact Info
  + Mailto: link
* Sign up for newsletter

Tags

* Media Type
* Contact (?)
* Role(s)
* Organization Type
* Product Type
* Topic(s)
* Featured? Yes/No

Content Display Rules:

* Displays related stories, by organization type, or role, and topic
* Displays related blog posts, by organization type, or role, and topic
* Displays related news

### Customer List

Attributes

* Name
* Description
* Sign up for newsletter

Tags

* Organization Type

Content Display Rules:

* Displays related customers by organization type
* Displays related stories, and blog posts, by role, organization type, and topic

### Customer Detail

Attributes

* Name
* Description
* Logo
* Link

Tags

* Organization Type
* Featured? Yes/No

Content Display Rules:

### Branch Locations

Attributes

* Name
* Description
* Sign up for newsletter

Tags

* Location

Content Display Rules:

* Displays branches by location

### Branch Detail

Attributes

* Name
* Address
* Map Coordinates
* Primary Phone #
* Hours

Tags

* Location

Content Display Rules:

### ATM Locations

Attributes

* Name
* Description

Tags

* Location

Content Display Rules:

* Displays ATMs by location

### ATM Detail

Attributes

* Name
* Address
* Map Coordinates

Tags

* Location

Content Display Rules:

### Campaign

* Title
* Description
* Call to Action
* Image
* Details
* Body Images (Infographic/Other image)

Tags

* Role(s)
* Organization Type(s)
* Product Type
* Topic(s)
* Featured? Yes/No

Content Display Rules:

* Displays related stories, by organization type, or role, and topic
* Displays related blog posts, by organization type, or role, and topic
* Displays related products, by organization type, or role
* Sign up for newsletter

### Careers

* Title
* Description
* Call to Action (browse jobs)
* Image
* Details
* Key Points
* Body Images/videos

Tags

Content Display Rules:

### Content Detail

* Title
* Description
* Call to Action
* Image
* Details
* Body Images (Infographic/Other image)
* Sign up for newsletter

Tags

* Role(s)
* Organization Type(s)

Content Display Rules:

* Displays related stories, by organization type, or role
* Displays related blog posts, by organization type, or role
* Displays related organization, by organization type

### FAQ

* Title
* Description
* Question Category
  + Question
    1. Answer

Tags

* Role(s)
* Product Type(s)
* Organization Type(s)

Content Display Rules:

### Financial Learning Center

* Title
* Description
* Image
* Question Category
  + Question
    1. Answer

Tags

* Role(s)
* Product Type(s)
* Organization Type(s)

Content Display Rules:

### People:

* Headshot (Image)
* First name
* Last name
* Title
* Description – Mini Bio
* Phone
* Email

## **Filters & Sorts:**

The following describes the filters that will appear on specific pages of the site.

### Blogs:

Filters

* Topic
* Organization Type

Sorts

* Most Recent
* Most Popular (read, & shared)

### Branch Locations:

Filters

* Address or Zip Code

### ATM Locations:

Filters

* Address or Zip Code

### Case Studies:

Filters

* Topic
* Organization Type

Sorts

* A-Z
* Z-A
* Most Recent
* Most Popular (read, & shared)

### Clients:

Filters

* Organization Type

### Case Studies:

Filters

* Topic
* Media Type: News Types
* Organization Type

Sorts

* Most Recent
* Most Popular (read, & shared)

### Search:

Filters

* Topic
* Media Type
* Organization Type
* Role
* Product Type

Sorts

* Most Recent
* Most Popular (read, & shared)
* A-Z
* Z-A