SearchCheck
Planning for search success

The risks of information invisibility

Organisations are at risk if employees are unable to find the best available information to use when making business-critical decisions. They need to be able to trust intranet and enterprise search applications to deliver highly relevant information.

It is very difficult to know whether these search applications are fit for purpose and working optimally. Very few search managers have enough experience from other organisations to be able to define search best practice and to develop and implement a corporate search strategy.

Assessing the attainment gap

SearchCheck is a planning tool to support the development of a prioritized roadmap for intranet and enterprise search development. SearchCheck is platform independent and is relevant to all search applications, including open source and Microsoft O365.

The objective is to define the extent of the gap between the current situation and what the business and its employees expect search to deliver over the next 12 months using a set of heuristic statements as a basis for the scoring.

Assessment scope

The topics explored in the process are

Search strategy – alignment of the search strategy to the business strategy and defining the core performance metrics (5 CheckPoints)

Governance – who are the stakeholders and what financial and team resources are available (5 CheckPoints)

User requirements – understanding why and how employees are searching, including what are now termed 'professional searchers in compliance, patent and other departments where recall is very important (3 CheckPoints)

Content scope – assessing quality and content range, including the use of taxonomies and other metadata and the scope of the information made available through other enterprise applications (8 CheckPoints)

Technical platforms – functionality, vendor/integrator relationships, IT support and application roadmap (9 CheckPoints)

Search performance – ensuring that the metrics are being used will enable the user experience to be optimized and problems quickly identified (4 CheckPoints)

User experience – focusing on the user interface (especially query management) and search satisfaction (6 CheckPoints)

The process

At a meeting (or video conference) with the search manager and their colleagues the agreed CheckPoints are discussed and scored on the current situation and what the position needs to be in 12 months' time.

The two scores for each CheckPoint will be somewhere between 5 (best practice has been achieved) and 0 (no action is being taken)

The outcome is a gap analysis and capability assessment that the search team can use to prioritise actions during the course of the 12-month period and also to report on progress to search stakeholders.

An Executive Report is delivered that makes recommendations on how best to implement the agreed actions.

The fixed fee includes a follow-up meeting in six months to review progress and take account of changes in requirements.

Consultant

Martin White FRSC FBCS set up Intranet Focus Ltd. in 1999. Since then he has undertaken over 50 intranet and enterprise search projects in the UK, Denmark, France, Germany, Sweden, Switzerland and the USA. He is the author of Making Search Work and Enterprise Search. In 2018 he established The Search Network of specialist search consultants who collectively author the annual Search Insights report. He has been a Visiting Professor at the Information School, University of Sheffield since 2002 where he specialises in information retrieval.

The SearchCheck 5-Step Project Plan

Step 1
The project schedule and potential attendees at the Assessment meeting are agreed.   A decision is reached on whether certain heuristics can be omitted, and others added, to customise the assessment for the client

Step 2
An on-site meeting is held with staff directly involved in supporting and developing the application(s) and ideally some representative stakeholders.

It is also possible to conduct the Assessment scoring as a video conference.

Each of the topics is the discussed and scored for the current situation and then scored for what needs to be achieved to meet business and user requirements over the succeeding 12 months.

The structure and scope of the Executive Report is agreed. This would typically be around 15-20 pages in length.

Step 3
The draft Executive Report will be submitted within 10 working days of the on-site meeting. It will highlight the priority actions to be taken, the resources required to complete these actions and any associated risks and dependencies that could potentially impact the progress of the project. The report will typically be around 20pp in length and written for stakeholders as well as the team.

Step 4
The draft Executive Report will be revised in the light of comments from the client. The final Executive Report will be submitted within 10 working days of all the comments being received.

Step 5
The fee for SearchCheck includes an on-site (or video) follow-up meeting six months after the Executive Report has been signed off. At this meeting the progress made will be reviewed and if required the 12-month plan targets will be revised. A brief summary of the outcomes of the meeting is provided

List of CheckPoints.

The list below sets out the heuristics used for each CheckPoint to illustrate the scope of SearchCheck. Not all the heuristics will be relevant to every organisation. They can be deleted or supplemented to ensure that all relevant aspects are covered in the SearchCheck assessment.

Search strategy
1. Information is a strategic asset of the organisation and should be managed strategically and operationally
2. A strategic plan for search is essential to ensure objectives, resources, risks and dependencies are recognised and accepted
3. Search is just one way in which employees find information
4. Investment in any enterprise IT projects has to be justified on the impact it makes on business performance
5. Search has a business-critical role to play, and there are concomitant risks and dependencies

Governance
1. As an enterprise application enterprise search has to meet the requirements of a wide range of stakeholders
2. As an enterprise application enterprise search has to be owned and managed by a stakeholder with the authority to set and allocate resources
3. There should be a search team with a range of appropriate skills and experience
4. The search manager should have a clear line of reporting to both stakeholders and within the management structure
5. Because enterprise search applications are used by most employees there should be a full representative User Group.

User requirements
1. The information required to make operational decisions should be the basis for specifying search requirements
2. Search user requirements should be based on understanding why users are searching as well as how they are searching
3. The requirements of users in search-intensive roles should be clearly defined and addressed

Content scope
1. Content quality and content curation (metadata) enhance search performance
2. Organisations create content in local languages which is of value to employees working both in and outside of specific countries
3. Taxonomies, thesauri and controlled term lists improve search effectiveness
4. Users need to be aware of the scope of each of the multiple repositories and/or applications
5. Users should be able to comment on content that seems not to be fit for purpose.
6. The requirements for social media search should be defined and achieved
7. Corporate emails are a valuable source of information but searching them gives rise to a number of compliance issues
8. Content is security trimmed in accordance with the protective marking policy of the organisation

Technical platform
1. The search application has to meet both current and anticipated user requirements
2. A close and constructive relationship should be maintained with vendors, integrators and third-party contractors
3. A technology development roadmap is essential to be able to capitalise on the software investment and to understand implementation and training requirements
4. Response times to queries should be optimal and consistent
5. The IT Help Desk and the search team should maintain a close and open relationship
6. Search application dependences have to be managed proactively
7. Where appropriate staff can use a mobile search application
8. The disaster recovery protocol has been optimised for search applications and has been tested for compliance
9. Careful management of crawl schedules is required to ensure all repositories are indexed at an appropriate frequency

Search performance
1. Search query logs should be reviewed on a regular basis and within the context of organisational requirements
2. High ranked and low ranked queries are replicated by the search team to ensure there is an optimum use of search
3. Users need to be able to provide immediate feedback on results and on the search application itself
4. Experienced searchers are a valuable source of information on search performance

User experience
1. Usability tests are carried out on a regular basis to ensure that the search application is as intuitive to use as possible
2. New employees (including employees in new business roles) need to be trained on how to make effective use of search applications
3. Personalised searches can result in users becoming concerned about what they might be missing
4. The presentation of results from federated searches is consistent
5. The needs of users with visual and/or other special needs are met by the user interface
6. Overall search users should consider that the search experience is satisfactory for their requirements