



# Enterprise Search Management

## One-day on-site training course

April 2022

Intranet Focus Ltd

## The course leader



Martin White has gained international reputation over the last twenty years for his understanding of how to manage enterprise and intranet search applications for the benefit of the organisation. His first major project was for the International Monetary Fund, starting the day before 9/11 and still finishing on schedule.

Many of his clients have been multi-national organisations with complex information management and information discovery challenges, including Atlas Copco, Bayer, Boeringer Ingelheim, Ericsson Telecommunications, Hoffman La Roche, Hogan Lovells, NATO, Novozymes, Trelleborg, Ubisoft, the United Nations, White & Case and the World Bank. A successful search strategy project he undertook for MITRE in the USA was carried out virtually from the UK. He specialises in finding solutions for organisations working in multiple languages.

Martin has written four of the five books on enterprise search management, including Making Search Work in 2008 and the second edition of Enterprise Search in 2015. His report on Achieving Enterprise Search Satisfaction was published in 2018 and in the same year he published Managing Expectations, a book about building client-consultant relationships.

From 2011 to 2021 he was the author of a monthly search column in CMSWire and is Editor of Informer, the newsletter of the British Computer Society Information Retrieval Specialist Group. Martin has been a Visiting Professor at the Information School, University of Sheffield, since 2002, specialising in information management and interactive information retrieval (IIR).

Martin is a frequent speaker at conferences around the world. In March 2020 he ran a search workshop at the IntraTeam Event, Copenhagen, which scored 5/5 for content and delivery. Among the assessment comments from participants were

“What a wealth of insight! He anticipates every comment”

“Very inspirational, deep knowledge and a very tailored workshop”

Martin is a Fellow of the British Computer Society and a member of the Association for Computing Machinery (USA). He is a chemist by training and an information scientist by profession.

[Intranet Focus Ltd](http://IntranetFocusLtd). 12 Allcard Close, Horsham, RH12 5AJ UK +44 403 267030 +44 7831 269463  
[Martin.white@intranetfocus.com](mailto:Martin.white@intranetfocus.com)

## Enterprise search management – on-site one-day training

Enterprise and intranet search applications are used by 80% of employees every day as they seek information on a wide range of topics. However, surveys indicate 4 out of 5 organisations do not deliver a satisfactory search experience to their employees.

This one-day on-site training course will give you and your colleagues the guidance and inspiration to make immediate improvements in the performance of web, intranet and enterprise search applications. Video participation from other locations is welcomed.

The course will enable you to

- Understand how employees use enterprise search, and the implications for user interface design
- Assess whether your current search application is giving you the functionality and performance your users need
- Establish a range of metrics that will enable users and your organisation to define and measure search success
- Define the roles, responsibilities and training requirements for a search support team
- Judge the opportunities and challenges of implementing AI/ML technologies
- Develop near-term and longer-term strategies for enterprise search enhancement and possibly application migration

After the course attendees will receive a e-Workbook of reports and resources and a 30-day Q&A period to clarify any element of the course as the plan of action is developed.

The course is search platform neutral and no prior technical knowledge is required. It is based on 20 years of experience of enterprise search projects for [clients](#) in Europe and the USA as well as highly successful workshops in Washington DC, New York, London, Copenhagen, Brussels and Stockholm.

An indication of the scope of the topics covered in the course is set out in Appendix A.

There is scope for a limited degree of customization to meet specific training requirements of an organisation. At the end of each topic there will be a summary of the outcomes and implications for search optimization.

### Course duration

There are eight topics given in two sessions, each lasting 3hrs 30mins. A possible schedule would be to start at 09.00 and finish the morning session at 12.30. The afternoon session could start at 13.30 and run until 17.00. Another option would be to run the course over two days, perhaps in two afternoon sessions in Europe so that team members in North America could participate. The fee remains the same but there could be additional travel-related expenses. The video option may need to be spread over several days.

### Preparatory work

Leading up to the course participants would be asked to undertake a [Search Stress Test](#) so that there was a common level of understanding of the strengths and weaknesses of the current search applications. The outcomes of this Test can be used to track the progress of search development after the conclusion of the course.

### On-site arrangements

The meeting room should be equipped with a PC and a good quality projector and screen. The PC should have access to the Internet, and also to the search applications so that participants are able to demonstrate features of the current search applications. If some participants are joining via a video link it would be helpful for them to be displayed on a second screen. A back-up PC and projector would be desirable

### Video training

The course of lectures can be delivered over a video link provided by the organisation and with no on-site participants. This would require splitting the lectures into three sessions over three days.

### Slide documentation

The file of the slides would be forwarded at least three working days before the start of the course so that participants can have a printed version of the slides available on which to make notes.

### Certificate of Attendance

Each participant will receive a Certificate of Attendance for the course which will set out the topics they attended

### e-Workbook

After the course participants will receive an e-Workbook containing reports and links to research and other resources. This will be customized to cover topics that emerged during the course as being of particular importance to the organisation.

### Continuing support

From my experience with workshops, it may not be until sometime after a course that participants realize that they need clarification or additional information on some of the topics. For this reason, participants can ask for clarifications for a period of 30 days after the conclusion of the course

### Fee and payment terms

There is a fixed fee of £1600/€1900 for the on-site course together with agreed travel expenses. This is to encourage the organisation to offer the course to as many people as possible who could benefit from attending either the complete course or for some specific topics. No VAT will be charged. Travel expenses will be agreed in advance of the course.

The course date will be confirmed on receipt of a purchase order for the fee and travel expenses. The invoice will be raised on the day following the conclusion of the course, and payment within 30 days is requested. No other payment term can be accepted.

The fee for video-only delivery will depend on the duration and timing of the course.

# Appendix A Course Scope

## Session 1

### Achieving search satisfaction

- Introduction to the course
- Search satisfaction – the definitive objective
- Why enterprise search is different and difficult
- Information behaviours
- Four core use cases
- The eight-step programme for search satisfaction

### Search technology

- How enterprise search works
- Content processing
- Security management
- Query management
- AI and machine learning

### Information findability

- Making information findable
- The value of metadata and corporate taxonomies
- Managing search in multiple languages
- Managing PDF files
- Managing PPT files
- Managing Excel files
- Managing video and image files

### Searching for people and expertise

- Why people search is so important
- Thirteen challenges in name searching
- Managing personal profiles and GDPR implications
- Finding an expert
- Finding expertise

## Session 2

### User interface management

- The core elements of a search UI
- Optimising search results scanning
- Best bets and promoted content
- Snippets
- Filters and facets
- Federated search UI
- Usability testing

## Search metrics

- The long tail and its implications
- Analysing query click logs
- Impact of security trimming
- Metrics for technology optimization
- Metrics for search satisfaction
- Metrics for stakeholder reporting

## Managing a search team

- Roles and responsibilities
- The benefits of a Search Center of Excellence
- Power users and mentors
- Recruiting team members
- User training and mentoring

## Business cases for investment

- Boost, build or buy?
- Defining business requirements
- Defining stakeholder requirements
- “ROI” and “Time spent searching”
- Task-based business cases
- Integration with information and knowledge management
- A 50-item documentation checklist
- Presenting the business case – getting the message across