How to do Content and Findability Assessment
Introduction – Agnes Molnar

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Organizational Goals and Priorities

Remembering

• The users should access and find all the desired and relevant information and knowledge.
• The content should be relevant, timely, and authoritative.

Coordinating

• The users should be able to pull insights together from across various sources to see larger patterns.

Innovating

• The users should be able to learn, adapt, and innovate to meet new needs as they arise.
Search & Content Assessment

Stakeholder meetings & Interviews
- What are the primary pain points?
- Who are responsible for what?
- What are the key expectations?
- Governance?

End-user workshops
- What are their current search experiences?
- What content do they need?
- How do they use the content they find?
- Who do they work with?

End-user survey
- What are their current search experiences?
- What content do they need?
- How do they use the content they find?
- Who do they work with?

Content Review
- What types of content do exist?
- How the content is structured?
- What metadata & taxonomies are used?
- How consistent the information architecture & tagging are?

PAIN
- What are the primary pain points to solve?

GAIN
- What are the goals?
- How to measure success?
Findability

- Navigation
- Information Architecture
- Taxonomies & Metadata
- Content Sources
- Scope of Search
- User Experience
- Quality of results (relevance & recall)
- People & Expertise Search
STEP #1 – THE PAIN POINTS
“Content is not organized well, site architecture is confusing.”

“Hard to keep up with content changes”

“Site X is amazing. Every site should have a similar structure.”

“Clicking on ‘Organization’ is weird. It feels like going back – but I want to go forward.”

“We don’t understand how search works, and don’t know what to expect.”

“You just need to create a million bookmarks.”

“Am I allowed to delete this?”

“Too much content published at 2pm. Most of them disappears as soon as it is published.”

“Where should I start searching?”

“Search is easily accessible, easy to use.”

“Does our intranet make sense as is today?”

“I’d like to have focused and tailored content.”

“Where am I?”

“Users don’t know why and how to tag their content.”

“Tagging content is too much effort with no real benefits.”

“You have to know where to search for what.”
The Reality in Most Cases…
STEP #2 – KNOW YOUR USERS
Know your Users’ Needs
Your Key Users: Define Search Personas

How would John experience, react and behave in relation to this feature?

What do Adam, Eve and John think, feel, do and say?

What are their underlying needs we are trying to fulfill?
Personas – Example 1: “Andrew”

Andrew

“THE SEEKER-SORTER”

He is purposeful regarding searching and getting results. He knows exactly what he wants from a search experience and what is missing from the current solution. He’s a bit more technical than the others and likes going into details about how he uses other search engines, what functionalities he prefers and how he usually narrows his search.
Personas – Example 1: “Andrew”

Andrew needs:

1. **Better pagination to quickly jump between pages**
2. **Total number of results shown** and being able to select how many results he wants to be displayed per page
3. **Search results to be better organized** (based on type of instrument, operation, country, executing agency, etc.)
4. **Results to display proper metadata** so he can see if a result is relevant for him
5. **Advanced search solutions** because sometimes it is necessary for him to go more into details
6. **The type/category of the content clearly shown** (regulation, loan, etc.)
7. **To be able to sort and filter results** by his preference
Personas – Example 2: “Marta”

Marta

“THE EFFICIENT”

She mostly searches for several types of documents she needs for her daily work. She might need to go through dozens of them until she finds the one she is looking for which slows her down. She often looks for documents based on assumptions about where they are possibly stored, because it is still more efficient than using the current engine.
Personas – Example 2: “Marta”

Marta needs

- To find documents without knowing where they are stored but she also needs to see their location
- To be able to search based on project or loan number (related documents to appear)
- Results to display proper metadata so she can see if a result is relevant for her
- Being able to search within documents
- The type/category of the content clearly shown (regulation, loan, etc.)
- To be able to sort and filter results by her preference
- Quick preview of documents
- Improved access and permissions management to the documents
- Redesigned advanced search (incl. relevant filters to find documents easier)
- Document versioning (with indication which version was approved by the Board, etc.)
Involve & Get Involved!

- I'm lost for words.
- Give me power tools.
- I'm totally lost.
- Help me search.

Source: http://searchpatterns.org
#3 – KNOW YOUR CONTENT
“The No. 1 thing you can do to improve findability is to attend to your content.”
Content Assessment

• Platform, information architecture
• Metadata, taxonomy, tagging
• Permissions, roles, access
• Standards and Governance
• Usage Analytics and Metrics
#4 – CONTENT LIFECYCLE
Content Lifecycle – Create

- Responsibilities

- Who can **request** new content?
- Who can **create** new content?

- How to check if content does **exist**?
- ...

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Content Lifecycle – Create

Different types of content

Different processes

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Content Lifecycle – Maintenance

- Responsibilities
- Who is the “Content Owner”?  
  - Delegation?
- Automatize as much as possible
Content Lifecycle – Maintenance

Different types of content

Different processes
#5 – SEARCH FINDABILITY REQUIREMENTS
The Search Environment

- Platform
- Content Sources
- Content Search
- People and Expertise Search
- Search-Driven Applications
- Search Analytics and Metrics
Governance!
Elements of Governance

- Content Governance
- Search Governance
- Taxonomy Governance
Content Governance

Corporate Portal
- Permanent portal; highly structured and trusted content; formal publishing approval

Divisional Portal
- Less governance than corporate; semi-formal publishing approval

Group, Team, Project Sites
- Collaboration; fixed site templates; non-perpetual content that expires

Community Sites
- Social communities of interest and practice; content expires

Personal Sites / One Drive
- One Drive, Profile, Personal Blogs, Social

Degree of Governance: Low to High
The “Search Center of Excellence”

- Strategy
- Direction
- Governance and prioritizing
- Program management
- Advise, consult and analysis
- Communication
- Evangelize

Search management
- Architecture and best practices
- Project guidance / support
- Search quality, improvements and optimization

- Business, strategy and governance
- Search projects
- Search infrastructure
- Search operations

Project Manager
- Architects
- Consultants / delivery

Managed services
- Operations
- Hosting

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CONCLUSIONS
Recommendations

• Business Readiness
• Content Strategy
• Search Strategy
  – Content
  – Expertise
• Governance and Standards
• Design and User Experience
• Culture, Training, and Adoption
• Future Technologies (AI, etc.)
Recommendations based on the initial Assessment
Search is not a one-time project