How to Conduct a Findability and Content Assessment – Agnes Molnar for ISK)
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Edited Chat Discussion Notes

Agnes: Findability includes search, navigation, discovery, other means of accessing content e.g. via colleagues. Why is findability important? To remember, coordinate or innovate.

The initial steps are about understanding the landscape: (1) Talk to stakeholders; learn from end users (2) through workshops, (3) through surveys (4) Review the content

Stakeholders differ from end users when they are decision makers/ budget holders, but may also be end users; or perhaps they don't experience the platform themselves directly "I ask my assistant"

End users - don't ask them about search, answers not meaningful or necessarily true - ask about how they work, what content they use, and what content they create — Google is not comparable metaphor for enterprise search, you don't have the access to engineers that Google has, and one of your biggest issues in the enterprise is going to be permissions

Talk to both experienced staff and entry level staff because they often have very different perspectives and approaches

End user enquiry is about understanding the context in which the content is being used. This is an iterative process - start with stakeholder meetings to get helicopter view, then do content and end users review in parallel and go back to the stakeholders regularly to validate what's emerging

Analytics:

Bill: Does Agnes look at the data from the existing environment? The number of files? The types of files? Who creates the files? How many storage locations? How many logins? How many retrievals through a system? How many searches are done?

Agnes: Yes, analytics can be useful to understand the content and user behaviours

Andrew: The analytics are important to me as when a document is up for review I can go back to the author and say is this content really still required or does it need amending to make it more relevant.

Agnes: Important to validate insights from analytics with stakeholders

Bill: Organisations may not know they have analytic data. What I mean is systems produce the data even if the organisation is not looking at it.

Patrick: yes, or the analytics data is not in a form that is easy to interpret, or requires a lot of effort to interpret

Agnes: Search is thankless: if it works, people don't register it, if it doesn't work people complain - so it's important to track trends over time

Personas:

User personas are created from knowledge gathered in end user interviews and workshops - Agnes works with a designer, looking at patterns of behaviour around the content. Between 5-10 is a useful actionable number. While similar personas might crop up in different places, you can't just copy paste personas, because every organisation's context is different.

Eileen: What's the advantage of using personas vs listing down all the needs/requirements in a table? Not all organisations have designers.

Agnes: Personas help you define priorities, which a huge list on its own does not help you with. You can see which requirements meet the needs of how many personas. Mapping requirements to the personas gives you a sense of the priority

Annette: I agree with a map of personas you see „the forest and the trees".

Content Organisation and Governance:

Agnes: By organising your content you can enhance findability by giving a "library experience" in your content management system - i.e. users can find specific items, browse and discover, ask librarian for help.

Permissions, access and roles are also very important in the enterprise - security trimming means you can't see content you don't have access to - means that it is not discoverable - users don't know if it exists? This can be circumvented, you can do a content inventory so that they show up in search results, but if you don't have permission to access it, provide a "request access" button and workflow.

There can be unforeseen consequences of implementing search - understand and get the permissions right (do a permissions inventory before you add a new content source to search) - for example, items buried deep in folder structures that would never be found by navigating, and had no access restrictions, but when search is introduced, suddenly becomes discoverable: example of management salaries spreadsheet.

Lucky: Can we say that Information Security is one of the underlying process?

Patrick: Yes, it is an important later in the governance of content.

Dana: Will getting ourselves ISO certified for KM means improved findability?

Patrick: The ISO 30401 standard does validate whether there are good processes in place for knowledge production, knowledge distribution, knowledge use, and knowledge lifecycle, and findability for the critical knowledge resources would be an important factor here

Agnes: We need independent means of validating whether search is effective - testimony from users on what exists and is within scope of search, inventories from IT. We need to understand the sources, the scope of search, what content sources are connected to search, and what permissions are set. We need to review currency of documents and templates etc regularly to check whether they are still valid. Also consider event based reviews - eg where documents are based on regulations or policies and those regulations or policies are changed, all the dependent documents are also changed and updated. Who is the content owner? Who is responsible? What if the content owner moves/ leaves? Link content owners to functions or roles? Never have only one person responsible as content owner.

Audrey: One way we support this is to look at search terms that yield to low search success rates across knowledge bases and assess whether it's a findability challenge (e.g. by contrasting with clicks) or a gap in content as it may not be available at all - in which case we work with SMEs. Though as Agnes said, it can be a challenge to have an overall picture given the various sytems being in used to look information up

Access to People:

Lian San: If we can provide a basic directory of experts, how do we know that users are really consulting the experts or to ensure the consultation is captured in the system so that the knowledge can be recycled?

Patrick: System reports (if set up) should be able to track clicks from an expert profile (e.g. using a "contact" button). We have seen (and designed) systems where a question can be typed in the interface and automatically pulls up similar past enquiries and questions based on context/tags/keywords. If they proceed with the question submission, this is auto tagged, and the reply is also captured for reuse later.

Who is Responsible for Search?

Patrick: In lots of organisations, IT just sees their role as setting up the platform, maintaining it and administering users, but not to understand the context or content, so they do not routinely look at how to configure search to optimise the user experience - this is a black hole in search support in the enterprise

Agnes: Search is not an IT responsibility - only 20% IT and 80% business

Edgar: But Business may not understand Search either

Audrey: Can only agree to this, it's not often that search relevance / performance is actually assessed in light of users needs.

Agnes: This is why you need a dedicated search role/team to mediate between the business and the technology.

Bill: People from records management, knowledge management, content management are the middle layer between IT and the Endusers/Management.