

Strategies for search engine implementation in a corporate environment

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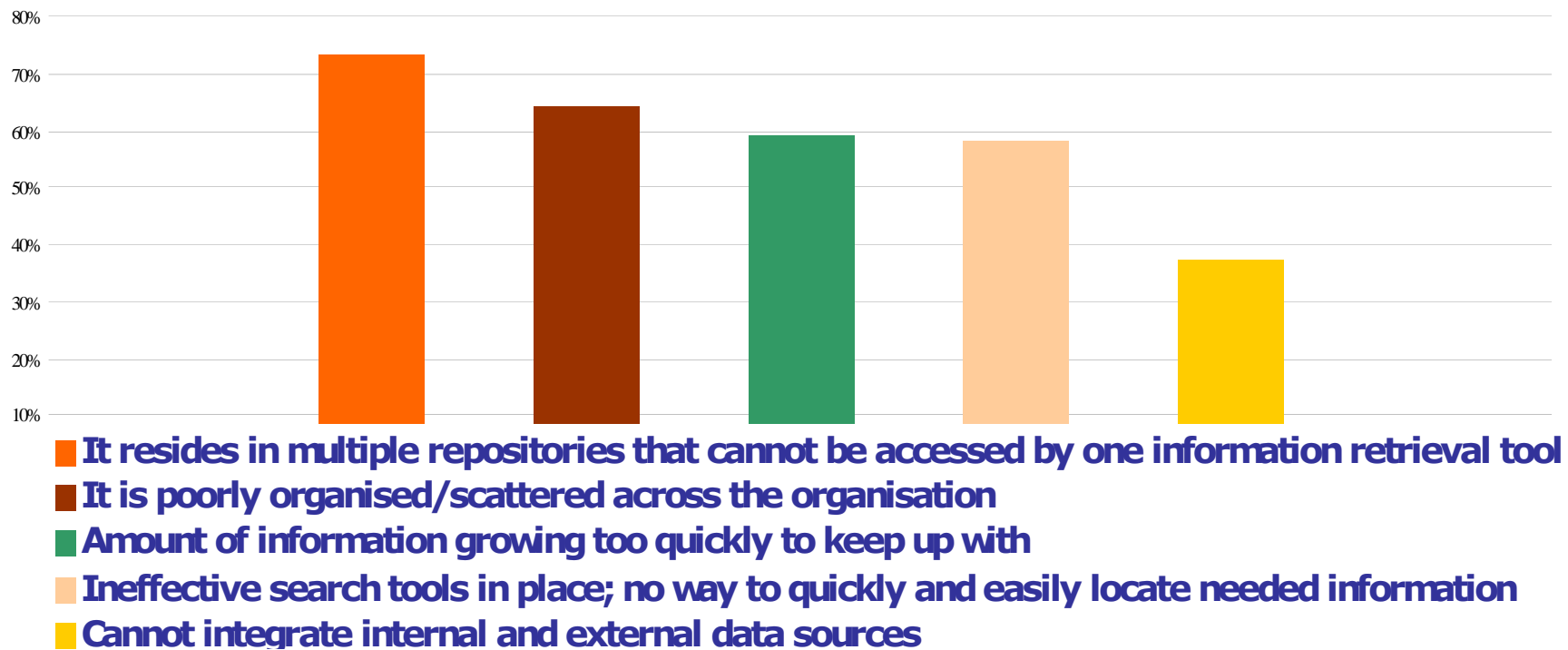
Agenda

- Why search so important
- Developing the business case for enterprise search
- The value of personas
- ROI does not work – risk assessment does!
- Implementation never stops
- Ten critical success factors
- Resources

Looking but not finding

- McKinsey Quarterly executive survey July 2005
 - Survey of 7800 executives in 132 countries
 - 20% of respondents at 'C' level
 - 29% of C-level respondents reported that they found it difficult to find information to make company-wide decisions
 - 40% of senior managers reported the same problem
- Implementing a search engine because the information architecture of a site is inadequate is not going to produce an effective solution to information research

Which of the following challenges do knowledge workers in your company have when it comes to using the wealth of corporate knowledge and information?



Inight Software/Vascom Bourne - IT Managers in the UK Financial Sector 2004

Trust is the primary metric

- Users want to know that they can trust:
 - That the search engine has indexed all the relevant documents
 - That the desired information can be found if it has been indexed
 - That it will be easier and quicker than any other approach
 - That if the information can't be found it is because there is no relevant document in the system
 - That the search engine is working properly

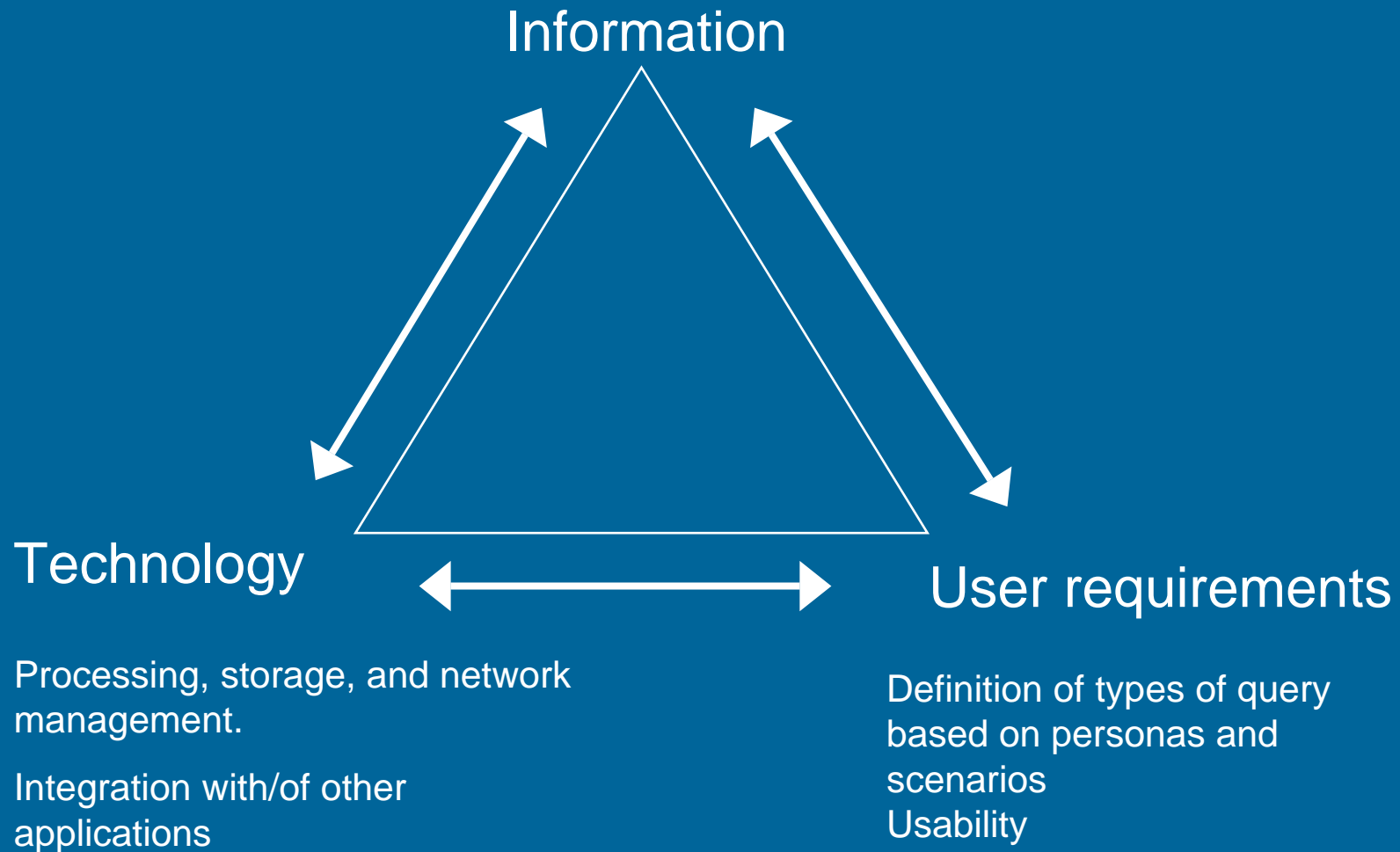
Intranet or enterprise?

- The quick fix may well be to implement an intranet search engine
- The better this works (and after this workshop it will work very well!) the more there will be a demand to extend the intranet search to be an enterprise search, where there will be a much wider range of applications, file types, and governance issues
- At the very least it would be prudent to develop 'what if' scenarios for upgrades in scope and power
- The additional front-end cost may be lower than anticipated

Enterprise search

- Enterprise search solutions need to cope with:
 - Structured (SQL) and unstructured information
 - Information held in specialised applications such as a document management system or a client management system
 - Wide range of document types
 - Wide range of language issues
 - IT infrastructure and network issues
 - Disarray in metadata
 - Availability of local support

Size of document, file format, and rate of addition of new documents, language, confidentiality and metadata tagging



Personas in search development

- Multiple benefits from persona development
 - Use in the RFP to illustrate the way in which searches are carried out
 - Use to help define pilot document set for product evaluation
 - Use to define user interfaces
 - Use to identify application integration requirements
 - Use as the basis for usability testing
 - Use to assess emergence of new search groups and requirements

There is no such person as a “user”

- Case study - Anglo-German pharmaceutical company
 - Research scientists working on new drug formulations, needing access to highly confidential internal documents and also to external databases
 - Clinical trials teams working through the drug registration process, again involving highly confidential information, much of it in a numeric format
 - Medical information specialists dealing with enquires from doctors and pharmacists about the correct use of the drugs, or initially reporting on adverse reactions. Speed of response is essential to deal with these enquiries

And yet more!

- Further categories
 - Product development teams working on formulations and product packaging, which may need to look at images of packing, and need to be aware of what is happening in the market place
 - Sales and marketing teams looking for information on sales channels, sales reports, and the activities of competitors.
 - Administration and support staff looking for policy and procedure documents. Unlike the groups above these documents may be in both German and English.

Making a business case

- It is impossible to make a business case based on return on investment
- It is difficult enough for a CMS, where there are a high volume of standard processes
- This is not the situation with search, and any case based on productivity or efficiency is unlikely to make the cut
- In most companies there is no reliable information on the volume, duration etc of searches

Risk management approach

- Companies are increasingly risk sensitive, and this can be a very powerful way of making a business case in reverse – “Look what may happen if we don’t make the investment”
- Some typical risks
 - Not being able to respond to a request for a document from a regulatory authority
 - Having to duplicate work because the original documents could not be found
 - Not being able to find documents that contained out-of-date or erroneous information in order to remove them
 - Not being able to respond quickly to requests from customers and clients for information that they would expect the organization to have immediate access to

Implementation

- Implementation never stops!
- There will always need to be
 - Fine tuning of the relevance algorithms
 - Dealing with feedback about broken searches
 - Undertaking usability tests
 - Modifying the user interfaces
 - Developing and managing application integration
 - Managing metadata and taxonomies
 - Deciding on whether to upgrade
 - Enhancing system performance

Ten critical success factors

- Excellent project management
- Knowing what there is to be searched
- Rigorous testing as part of the product evaluation
- Understanding user requirements
- Understanding the technology of search
- Anticipating scalability and extensibility issues
- Assessing integration issues
- Testing for usability
- Meeting changing user requirements
- Appreciating that 'trust' is the best metric of search performance

Resources

- CMSWatch report on Enterprise Search, written by Steve Arnold
 - www.cmswatch.com
- Enterprise Search Guidebook, written by Martin White
 - <http://www.freepint.com/shop/report/>