

How to Develop a Search Strategy and Support Team

The goal of a well-developed search strategy ensures that search supports the overall business objectives of an organization. With organizations becoming flatter and decision-making taking place lower in the organization, search has become a business critical application. This allows the new decision makers to make informed decisions. These decision makers trust the search applications to provide them with trustworthy and correct information on which to base their conclusions.

A search strategy is needed to ensure that the resources invested in search technology and the people to support it are aligned. An effective search strategy and support team must be set in the context of the overall information management strategy of the organization. The end product is ensuring that search supports the overall business objectives of the organization.

Step 1: Understand Why and How Search Is Used

It is important to gain an understanding of how and why search is used in your organization. This toolkit is focused on organizational search not search on a website.

There are several effective ways that we can gather information in several effective ways which will help us understand why and how search is used, including:

- Surveys - Through the use of a survey tool and several well-structured questions, you can quickly gain some insight into the primary reasons search is used in your organization and the frustrations that exist when searching for information through the current modes available.
- Interviews - Identify a few key individuals you know who are avid searchers. Interview them to gain an understanding of how search fits into their daily work.
- Analytics - Working with IT, obtain any reports that your ERM or ECM system may record about searches, e.g., heaviest times in the day for searching, search terms used, average number of results, etc. and use these to begin assessing the strengths and gaps of your current search processes and applications.
- Focus Groups – Identify important groups or areas in the organization who utilize search. Facilitate a group interview with team members that share a common need, goal, or problem. Gather information about combined perspectives and opinions. Questions can be organic – they can arise from the conversations.

AIIM Tip

Your objective is to thoroughly understand how people search for information, the amount of time they spend searching and where the information is located. This information will be very beneficial as you move on to drafting the search strategies for your organization. Information can be found everywhere, but the time people have to devote to searching for what they need is very limited. Therefore, the search strategies you put in place are critical to the success of the organization.

For more information

- [A Commitment to Innovation: A Strategy for Enterprise Search](#)
- [What Enterprise Users Want From Search in 2012](#)
- [Enterprise Search](#)
- [5 Keys to Conquering Your Enterprise Search Marketing Program](#)
- [Enterprise Search Strategy 101](#)
- [Embracing Enterprise Search](#)
- [I have Searched Everywhere](#)
- [What is Enterprise Search?](#)

Step 2: Establish a Search Support Team

A search support team helps ensure the search strategy is the right strategy for your organization. You will need several people on the team to cover the following items roles:

- Search Expert - This individual must have a very good understanding of the way in which the business and its information resources must find information; and the types of queries used in the search application.
- Analytics Expert - This individual must be detail oriented with a very good understanding of the business. They will be responsible for reviewing various reports and identifying new query terms while making sure the search application delivers relevant content for those terms.
- IT Liaison - The liaison ensures the search application fits into the overall information architecture and that the crawler features for the search tool are working properly. This person should be able to translate IT-technical speak into business-oriented language, and vice versa.
- Information Specialist - This person should be knowledgeable of the search application capabilities and features. They should be able to relate the features to the way people search and the organizational search requirements.
- Data Scientist – This person helps analyze, aggregate, visualize and interpret data. In essence, this person would clean the search results for consumption by the users.

AIIM Tip

Your search support team will most likely consist of individuals within the organization who are volunteering their time in addition to their normal job functions to assist in this project to improve search capabilities in the organization.

For more information

- [Planning Your Enterprise Search Marketing Program](#)
- [Why is Search so Difficult for Enterprises?](#)
- [Is True Enterprise Search Actually Possible?](#)

Step 3: Put the Search Strategy Together

Every organization has its own approach for writing business strategies for major applications. What your search strategy should cover:

- The scope of the search project;
- Whether the repositories centralized or distributed;
- Whether duplicate repositories should exist;
- How will the search team will communicate with management and staff;
- The scope of content to be addressed by this project;
- The priorities for enhancing the search capabilities (Search is an ongoing development project.);
- How search is impacted in a disaster (i.e., ensure search is included in the disaster recovery plan);
- How metadata is addressed and used (e.g., an enterprise Taxonomy);
- How search works on mobile devices? Are there preferred devices/platforms (operating systems)?
- Approved performance targets for up-time and search latency;
- Risks associated with search, particularly risks to the business for poor search performance;
- The key stakeholders for search;
- The search technology to be used;
- The existing search technology already in place;
- A strategy for Federated search strategy or search for specific technologies/repositories

AIIM Tip

Many approaches for developing search strategies exist. Use the strategy approach that is most accepted in your organization. If you have a 'tricky' state of repositories or your organization cannot have a federated repository, search engines can also be used as a NoSQL/graphdb store for creating your unique source for people that need to search contents from different repositories. It is important to use the strategy approach that is accepted in your organization.

For more information

- [What is Enterprise Search?](#)
- [Planning Your Enterprise Search Strategy](#)
- [Learning how to Crawl – Doing Bakeoffs Right: An Enterprise Search](#)
- [Search and You Will Find – Where is Enterprise Search?](#)
- [Solving the Inadequacies and Failures in Enterprise Search](#)

Step 4: Evaluate Search Terms

By using the analytic reports from the document repositories, you can review the search terms that are used routinely. You may also want to review the document titles or subjects that people use to describe their documents. As you do this, you will begin to see some inconsistent uses of terms and labels which make searching difficult, which will ultimately affect the quality of the search results. .

In the strategy, address the use of search terms from the time a document is created through when others may search for it.

AIIM Tip

For example, a 'Monthly Report', which may be titled that or it, may also be titled 'Operations Report' or 'Status Report'. While variations of the title or subject for this report make it clearer for the author, it can make it difficult and even confusing to retrieve these reports in the future.

For more information

- [Finding the Yellow Brick Road in Enterprise Search](#)
- [Choosing Search Terms](#)
- [Understanding Keywords](#)
- [How to develop an initial list of keywords](#)

Step 5: Metadata Strategy

Another aspect to cover in your search strategy is metadata. Throughout the process of drafting the search strategy, you have been analyzing search terms and how search is used in your organization. From this, two categories of metadata can be captured:

- Administrative - date, version, author, file type
- Descriptive - subject terms to provide context

Using the information you have gathered, draft a crosswalk of the terms used to describe your content and terms used to search for content. This crosswalk can become the basis for your thesaurus, which will help people locate information.

This is also a good opportunity to validate the metadata and tags used with the content your organization has in its repositories.

AIIM Tip

Remember that high quality, consistent metadata and tags are essential for search to deliver useful results. Focus on the metadata items that are likely to help specific groups of users find the information they need.

For more information

- [Taxonomy and Metadata Training Course](#)
- [Metadata](#)
- [Understanding Metadata](#)
- [Building a Metadata Schema](#)
- [Successful Taxonomy: 9 Keys to Success](#)
- [How to Develop Taxonomies](#)
- [Metadata collection strategies](#)

Step 6: Communicating Your Strategy

Once you have created and are ready to implement strategy, it is time to let others know about it. In communicating the strategy, encourage them to accept and help implement it. Effectively conveying the strategy and its importance and then encouraging buy-in can improve your results.

AIIM Tip

Keep your message simple. Share examples of good and poor search strategies. Doing so will help your associates better understand and interpret the strategy so they can aid in its implementation.

For more information

- [4 Dimensions of Enterprise Search Success](#)
- [Enterprise Search ROI](#)
- [Real World Challenges in Enterprise Search](#)
- [Search and Discovery – Exploiting Knowledge, Minimizing Risk](#)
- [Curated Content – Focused Knowledge Insights](#)
- [Increase the Value of Transactional and Textual Data](#)
- [Eight Ways to Communicate Your Strategy More Effectively](#)