Five Things You Need to do to Get Search Right

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What we do – Help organizations make information more findable, valuable and usable through taxonomy, metadata, information architecture

Enhance online customer experience, increasing revenue across channels

Improve operational productivity & content quality

Increase working value of digital assets through findability & reuse

Drive more value out of your content management & search platforms

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Retail

Manufacturing

Pharma, Life Sciences & Healthcare

Financial Services & Insurance

Housekeeping

- Webinar will last 60 minutes

- You may submit questions to the speakers via the Question box on your screen.

- Need help? You can email sharon@earley.com

- Tweet about this webinar with hashtag **#eawebinar**

- Follow us on Twitter at **@earleytaxonomy**

- Fill out the survey that should be in your inbox
  - Let us know what topics you are interested in, and how we can improve the series.

- Slides and recording will be available in a few days

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Paul Wlodarczyk

Practice Lead, Industrial Solutions
Earley & Associates

- Joined Earley & Associates in 2008

- Key focus areas: Improving the quality and findability of Product Technical Content and Product Data

- 30 years' experience in unstructured content and related technologies (search, content management, classification, taxonomy, localization)

- Leads engagements to improve search, content management, content, and dependent business processes.

- Deep industry experience in high tech (products, software, components, semiconductor), consumer, life sciences, energy & water infrastructure, finance, insurance, and aerospace.

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Patrick Bosek

Founding Partner
Jorsek LLC (easyDITA)

- Founded Jorsek LLC in 2007

- Key focus areas: Improving authoring processes and improving the entire information supply chain from content creation to consumption

- 10 years experience in publishing systems and content management

- Deep understanding of XML, semantic content, DITA

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Agenda and Objectives for Today

- Discuss 5 Things to Improve Search

- Present Key Concepts

- Illustrate with Real Case Study Examples

- Show you what's Possible

- Answer Your Questions

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Goals (Why are we improving search?)

- Deliver Answers

- Call Center Deflection

- Improve Customer Experience

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Our Point of View on the "5 Things" to get Right

- Shrink your content using Component Content
  - Either componentize the source, or surface smaller bits of the output.

- Define your terms using Taxonomy and Metadata
  - Mine customer-generated sources (search logs, chat logs) for customer language, and map it to your standard language.

- Prioritize FAQs and How-to Content
  - Focus on answer-oriented content that workers need to be successful.

- Get feedback through Ratings and Analytics
  - You can only improve what you can measure.

- It's a process: Metrics-driven Governance
  - Stop thinking about content improvement as a project. Use metrics to set the content development agenda, and establish a cycle to be responsive.

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The "5 Things" in Action: Financial Sales Self-help Case Study

PROBLEM:
Search takes too long
Call center inundated

SOLUTION:
Self-help via an
Intelligent Assistant

SOLUTION DETAILS:
1. **Component content:** DITA FAQs and How-to's
2. **Taxonomy** and tagging of components for search
3. **Analytics** shows what is searched & viewed
4. **Ratings & comments** from end-users
5. **Dashboard** summarizes metrics for action
6. **Governance process** sets a cycle for continuous improvement
7. **Click to chat** integration with support desk

RESULTS:
- **Self-help – use search 1st, chat 2nd**
- **Call centers re-focus on revenue growth**

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Where were they?

- Product Docs in PDF

- Customer Support a Call Center Function

- Product Docs/Support Siloed

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Where were they? – Product Docs in PDF

- PDFs produced like books

- Stored in an ECM/WCM

- No feedback

ECM

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Product Docs in PDF – What's the Problem?

- Poor search experience
- 2 step search
  - Online to find PDF
  - Offline to find content
- No feedback
- No metrics
  - User is "lost" once the PDF is downloaded
- No mobile experience
- Devalues Product Documentation

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Thing #1: Component Content

- Break up documents into smaller "chunks" that contain the answers.
- Index the answers by tagging them to the concepts and terms in the questions.
- Reuse components between documents.
- Often – convert to XML formats (e.g. DITA)

Document 1

Document 2
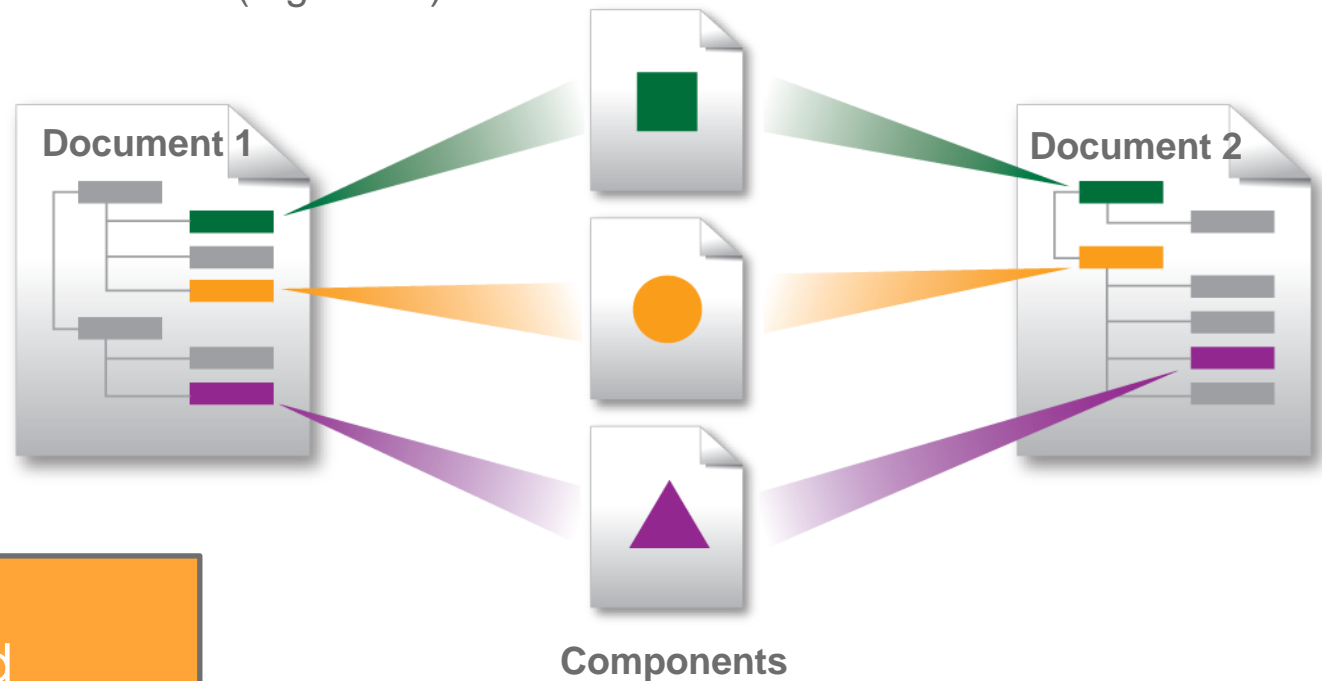
Components

Key to success:
DITA authoring and
content management
tools that were accessible
to business users.

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Structured Authoring: Break Large Documents Into Components
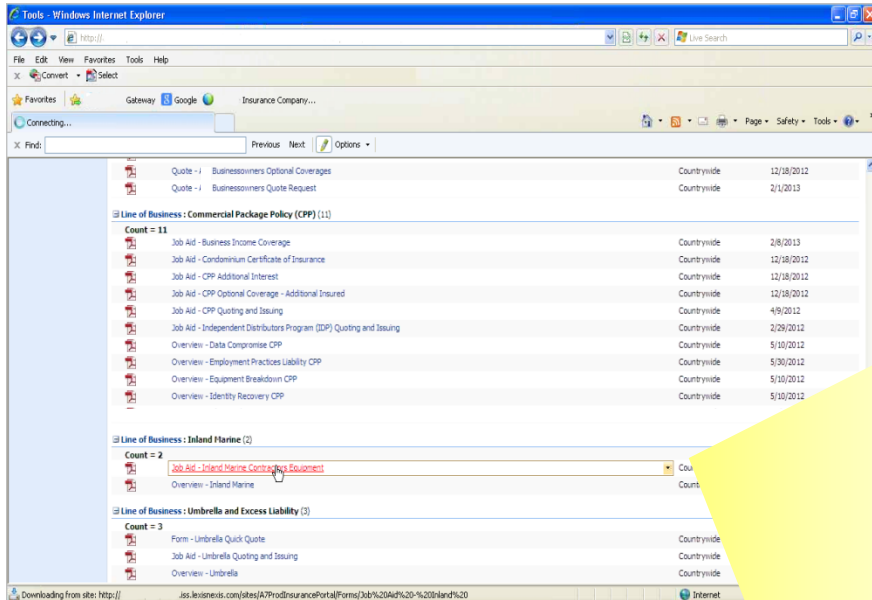
Before: "Construction Definitions" are on page 7 of a 50-page PDF file.

Using metadata search or browse to specific group or area

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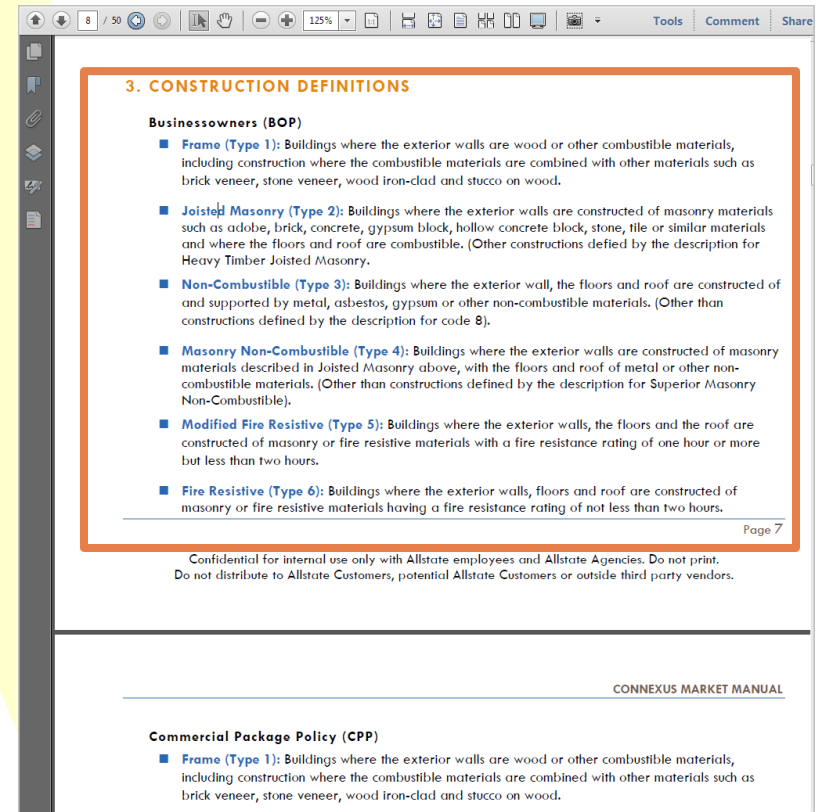
Intelligent Assistant: Relevant Content

After: Search for *"construction"* returns the content in the help window. Converting content to XML enables reformatting for different delivery channels (e.g. PDF, HTML, text-to-speech, embedded, etc.)

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Componentizing Your Content
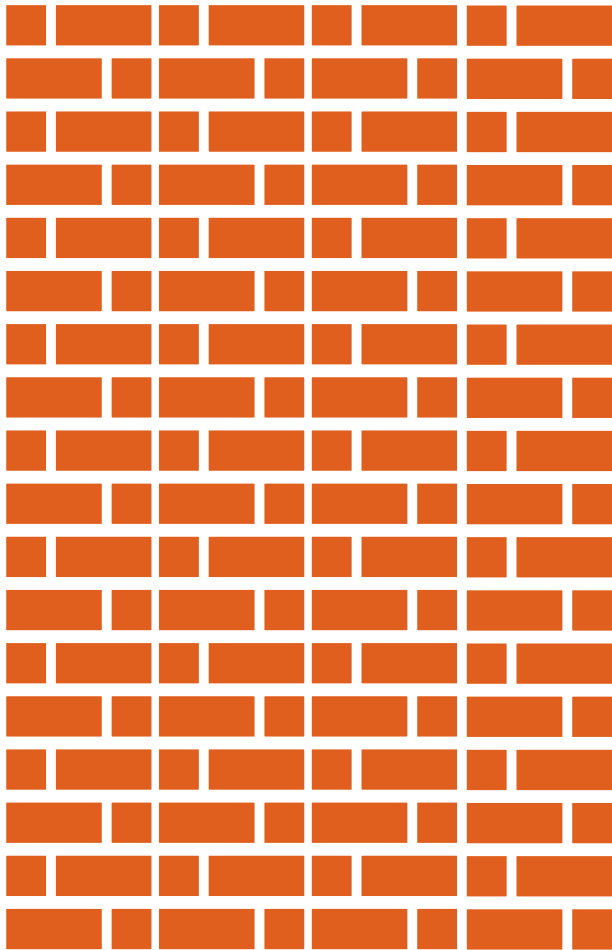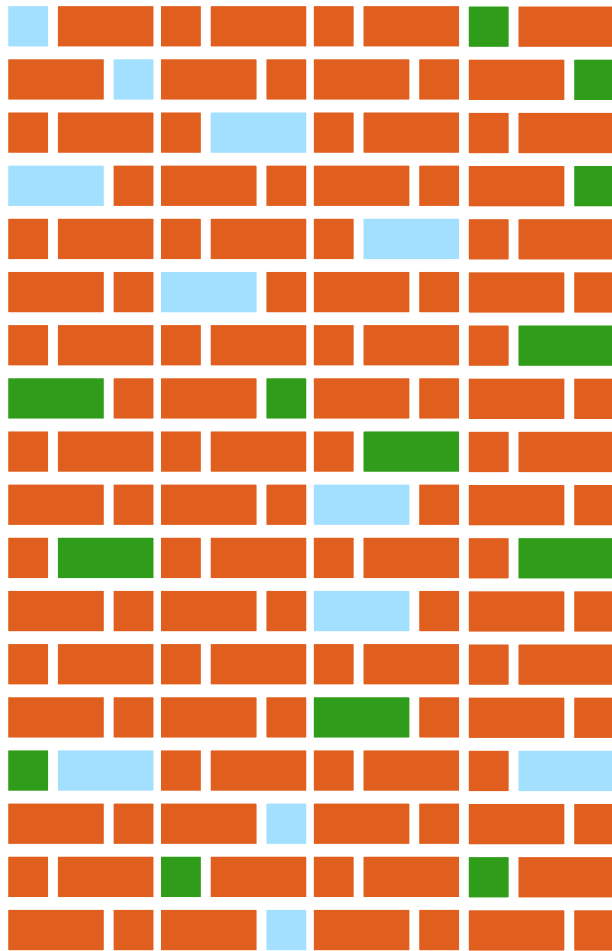
PDF

Step 1
Start with PDF (book)

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Step 2

Break it down into logical, digestible pieces

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Step 3
Add "is-ness"

🟧 Procedures (tasks)

🟩 FAQs

🟦 About (concepts)

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The Before and After

Question: Can I sell a XYZ product to a bakery?

PDF

All About Selling Our Financial Products to Food Service Small Business

We have a wide variety of products for the food service industry…

You can sell an XYQ to dinners, food carts, fast food chains, and other general eateries, but not to food bakeries or ice cream parlors. Bakeries are best suited for XYZ. For ice cream parlors you should offer to sell XYW or TYZ…

Never consider selling both XYW and TYZ to two different locations inside of one chain…

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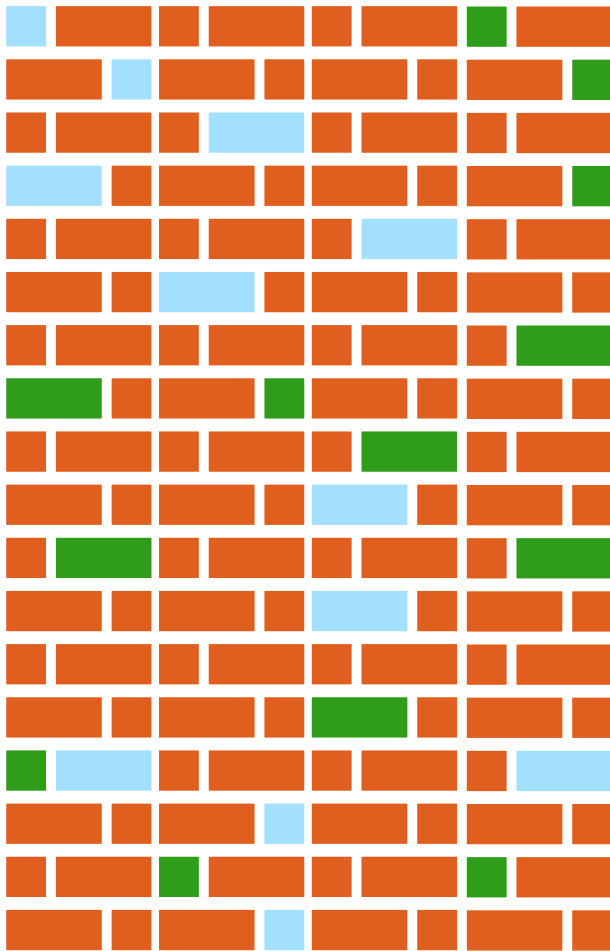
Can I sell a XYZ product to a bakery?

Yes

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Result: Answers to Questions

By simply breaking up long document content into smaller, answer-oriented chunks, we can get closer to answering questions:

- How Do I change a mailing address?

- What is the Green Upgrade?

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Thing #2: Taxonomy & Metadata Modeling

- Diagram the Questions
- Model the best methods for delivering Answers
- Gives us insight into the **Domain Model**:

  - What is the **SIC code** for a **<type of customer>**?
    - **SIC code(s) ← List of relevant codes**
  - How do I do **<specific task>**?
    - **Step-by-step procedure ← Walk thru step-by-step procedure**
  - Can I sell this product to a **<type of customer >**?
    - **Yes or no** answer **← Display answer to question in search results**
  - What is our target customer for **<product>**?
    - **Types of customers ← Simple list of customer types**
  - What is the **<minimum or maximum limit>** for **<qualification criterion>** for **<product>**?
    - **A number. ← Display the Number**

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VA college

Virginia university

Commonwealth
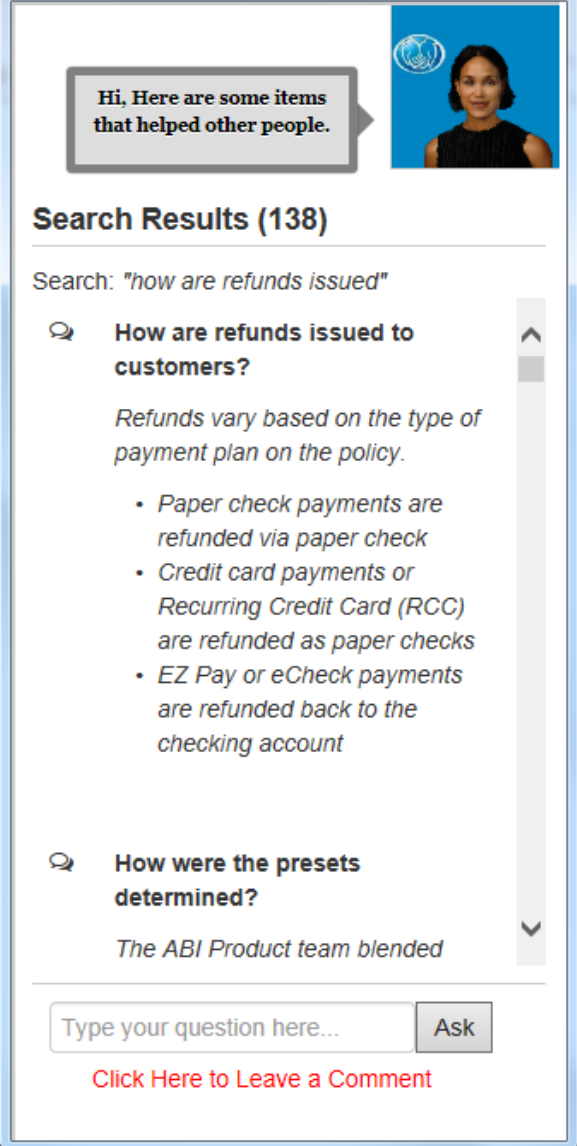of Virginia trade
school

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Taxonomy:

It's Tuning.

It's an Art.

Thing #3: Prioritize Answer-oriented Content - FAQs & How-To's

- Make "answer-oriented" content the top priority

- FAQs and How-to materials contain answers

- Analyze the existing information
  - Documents – FAQ and How-To
  - Data – references, look-up tables

- Does the content contain the answers to the questions?
  - Yes – Good!
  - No – Not uncommon, but not the end of the world.

- What do we need to do?
  - Locate the answer
  - Present the answer
  - Optimize the answer for action

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Thing #4: Ratings & Analytics
Understand Interactions with Content using Google Analytics (GA)

- GA treats search-based web application like a web site
- Every action is a "click" on a link to a "page"
- "Pages" are really application modules

Google Analytics can tell us almost everything we need to know about how content is being used, and to infer if content is effective at answering Customers' questions.

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Thing #4: Ratings & Comments for direct feedback

Can Rate & Comment on any document

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Adding Support to the Equation

- Documentation becomes front line

- Support fall back
  - Considered a "failure case" – tracked

- Support routes resolved issues as bugs in documentation

Offers a link to Chat for certain queries

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Thing #5: Metrics-driven Content Governance Cycles

Establish several metrics-driven cycles that run monthly or as needed: Examples:

Interaction Analysis
- Measure pathway through content & utilization (impressions, reading time)
- Identify high-value and missing content, usability issues

Search Analysis
- Identify improvements for search curation (thesaurus, auto-completes, best bets, etc.)
- Identify missing content

Impact Analysis
- Correlate content interactions to value drivers
- Identify action plans (improve content, search, other programs)

Content Analysis
- Measure compliance with editorial & tagging guidelines
- Remediate issues

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User Analytics

- Feed back loop
- Continual improvement
- Purpose driven content development

Observe → Author → Publish → Observe (cycle diagram)

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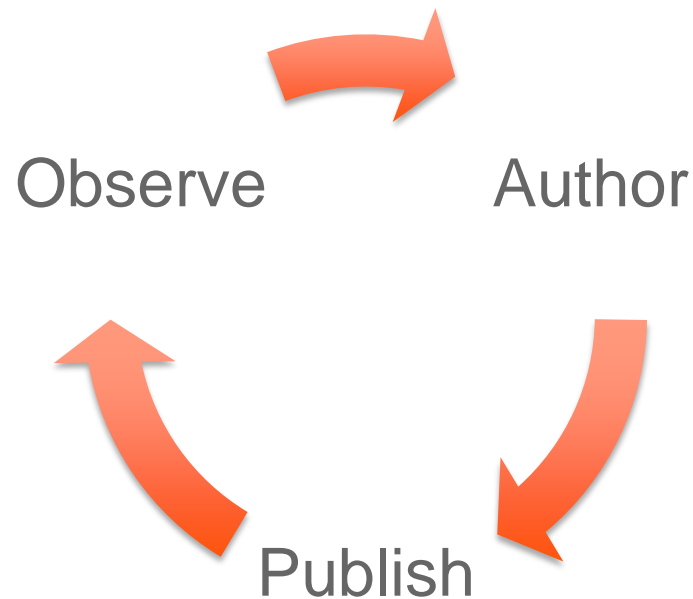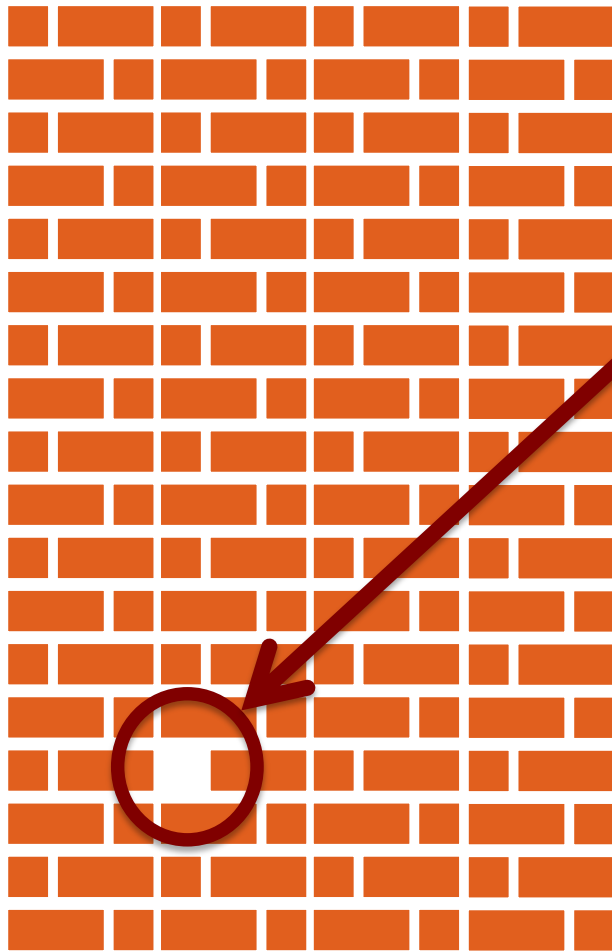
Hey look! There's your problem…

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Is this achievable in my organization?

> Any organization with many of these traits is a good candidate for a successful proof of concept in 100 days or less.

- **People**
  - Organized cross-functional team in place
  - Culture of Metrics / Measures
  - Culture of Business and IT Collaboration

- **Technology**
  - ECM Platform
  - Web Portal / Search

- **Process**
  - Program Management
  - Agile / Iterative Development
  - Content Lifecycle
  - Content / Data Governance

- **Content**
  - High-quality content
  - Task-oriented content
  - Taxonomy, metadata, and tagging

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Questions?

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Upcoming Appearances – Paul Wlodarczyk

Date	Event	Topic
April 29	2014 CMS/DITA North America	Metrics-Driven Content Governance: Managing Information Development for Business Outcomes
May 14	Connect IT 2014**	Measuring Information Engagement: The Key to Program Support and Resourcing

CONNECT IT MAY 13-15 · 2014
HYATT REGENCY · GREENWICH, CONNECTICUT

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Founded - 1994
Headquarters - Boston, MA

We make information more findable, useful, and valuable

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Let us know what topics you are interested in and how we can improve the series. Email your suggestions to sharon@earley.com

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Thank You

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Slides I might use and can't bring
myself to delete ☹

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Why now? What is driving this transformation?

- Rapid maturation of ability to deliver and display content
  - Internet-connected mobile devices – smart phones and tablets
  - ATMs, gas pump transactions, GPS and GPS apps
  - XML, SOA, web services, and syndication

- Business exploitation of Internet-connected mobile devices
  - Company-issued or BYO
  - Sales professionals, field service, logistics
  - Requires multi-channel content
  - Smaller form-factor does not favor document display

- Analytics of web, search, and social media
  - Two-way dialog introduces terms and concepts
  - Behavior provides evidence for content quality and value
  - Ratings and comments give direct evidence on content

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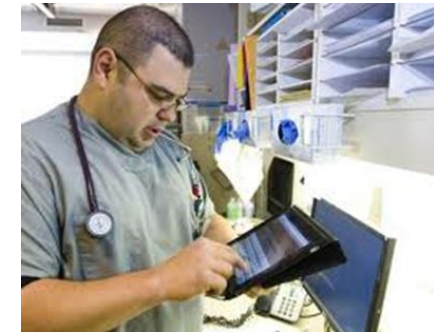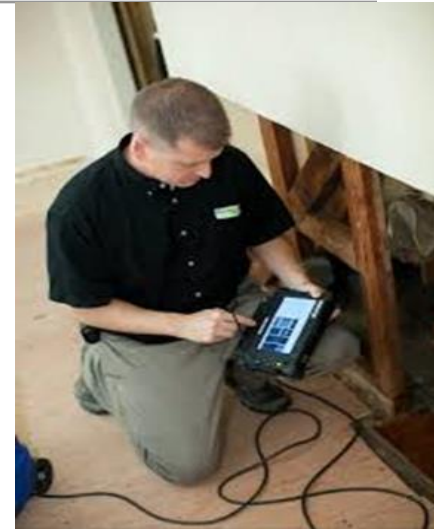
Document Management Often Falls Short

Too often, projects aim no farther than Document Search & Retrieval:

- *Excellent* for finding **documents** that contain facts, rules, and procedures
- Just *OK* at finding the **answers** I need

Why doesn't document search provide answers?

- We return the artifacts we have **lying around** (manuals, training, FAQs)

Why?

- We **don't invest in task-oriented content**.

Why?

- We **don't invest in modeling user intent and search context.**

Why?

- We **don't change the way we create content** –
- We still create "books" instead of components

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