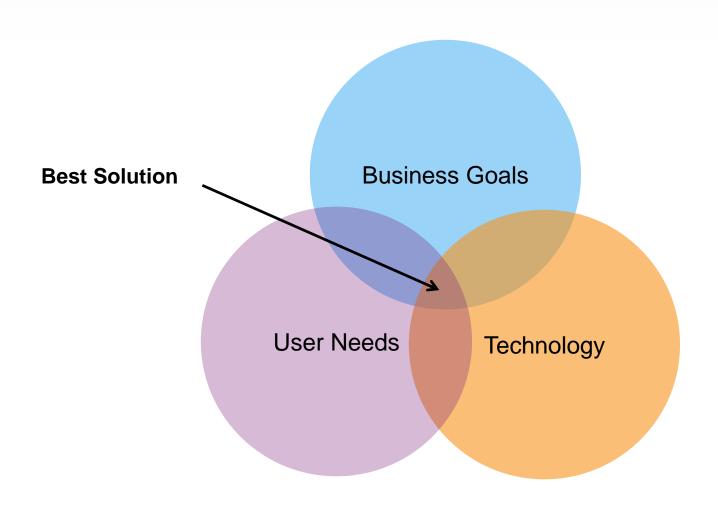
## Comperio Search Breakfast Seminar

Job Maelane John Thompson



### **SPRINT 0**

### Designing solutions is not an egotrip



### Goal – Be Prepared

### Business:

- Know that we are providing a valuable solution

#### Users

Know that what we build is useful for users

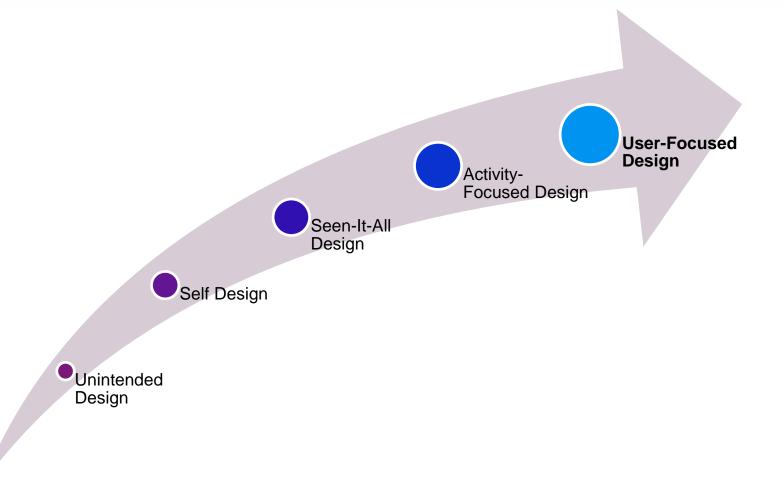
### Information:

 Know that we provide efficient and transparent / structured access to the right information

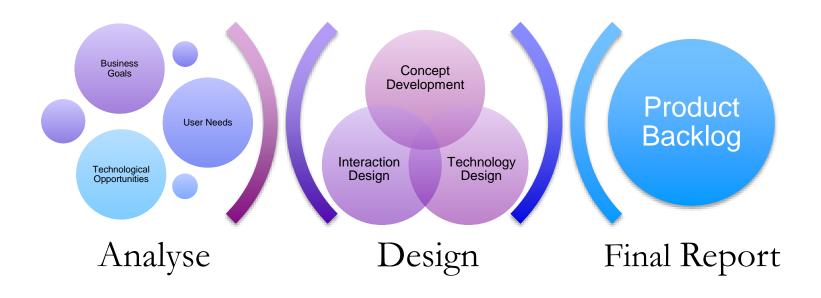
### Technology:

 Know that we estimate and prioritise appropriately and deliver according to plan in terms of risks and costs

## 5 Different Design Processes. What is Yours?



## Sprint 0 - Roadmap



## Sprint 0: Overall Organisation of Activites



## Analysis

#### Recommended Activities

- Analysis of existing work
- Stakeholder meetings
- User Interviews
- Technology Assessment
- Research

### Required Resources

- Representatives for
  - Business
  - Users
  - IT administration
- Existing documentation

- Personas
- User Stories
- Data Source Inventory
- Cost/Benefit Considerations
- ROI analysis





### Concept Development

#### Recommended activities

- Modelling of searchable information objects
- Task Analysis
- Drawing of concept sketches

#### Required resources

- Representatives for
  - Users
  - IT management
- Example documentation

- Information Model
- Process Models
- Concept Sketch
- Interactive concept demo



## Interaction & Graphic Design

#### Recommended activities

- Drawing of screens
- User testing of screenshots of selected user

### Required resources

- Representatives for
  - Users

- Wireframes
- Interactive Prototypes







## Technology Design

#### Recommended activities

- Analyse & prototype integration with selected source systems
- Scaling of hardware
- Prioritise the order of integration of source systems

### Required resources

- Representatives for
  - IT management
  - System access
  - Login
- Integration points

- Metadata Model
- System Architecture

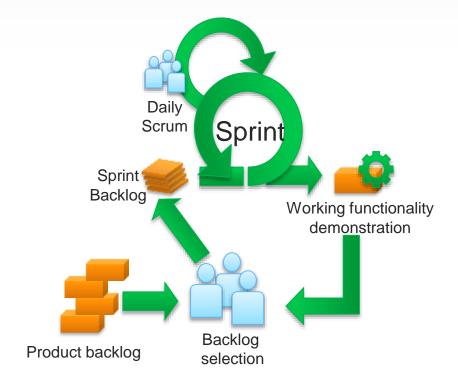






### Final Report

- The analysis and design deliverables
- The initial product backlog ready for implementation project
- Plan for Quick Win and subsequent phases







Design

### INFORMATION MANAGEMENT STRATEGY

## Analysis of existing systems

# Current Information Management Strategy

- Non-existent
- Out of date
- Rarely utilised
- New
- Currently upgrading



# Current Information Management Strategy

- Analysis of existing:
  - Query Logs (top 10 queries etc.)
  - Search usage (search traffic etc.)
  - Search behaviour (search health, abandoned searches etc.)
  - User characteristics
  - Organisation's enterprise knowledge systems



# Current Information Management Strategy

- Analysis of:
  - Existing content source
  - New content source (Not indexed)
  - Legacy systems
  - Third party systems
- Identify what is relevant vs irrelevant
- Identify common metadata elements between separate content sources
- Build relationships and\or links between content sources



## Steps to developing an Information Model for search



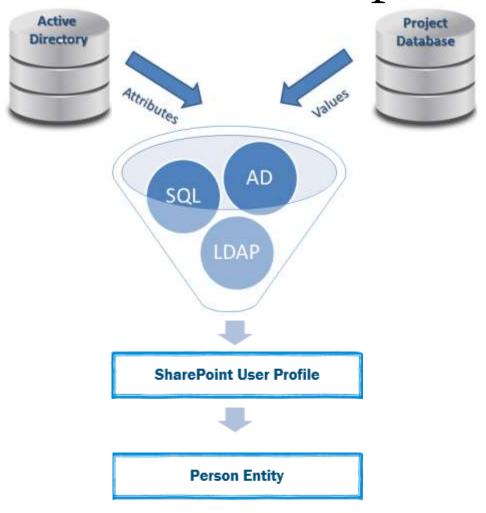


## Steps to developing an Information Model for search

- Identify all the relevant content sources
- Identify which metadata needs to be indexed
- Identify related content source for content enrichment



# Steps to developing an Information Model for search - People



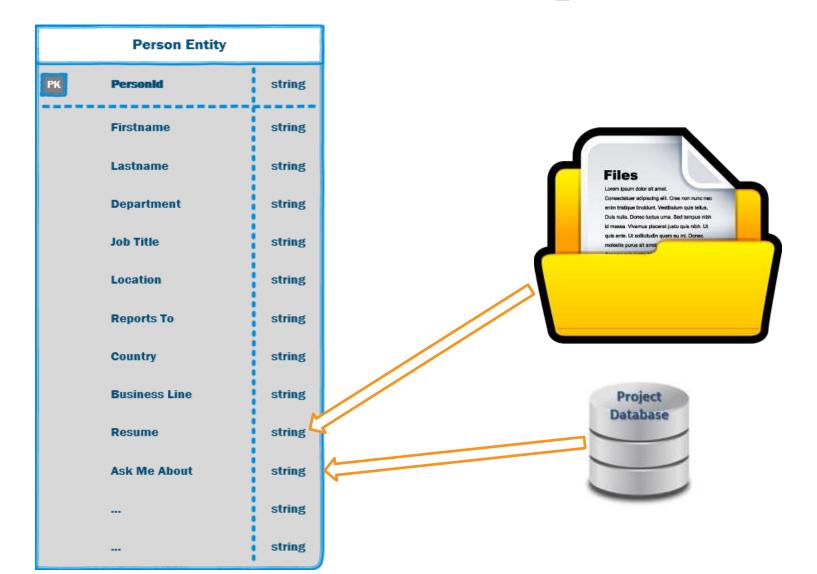
# Steps to developing an Information Model for search - People



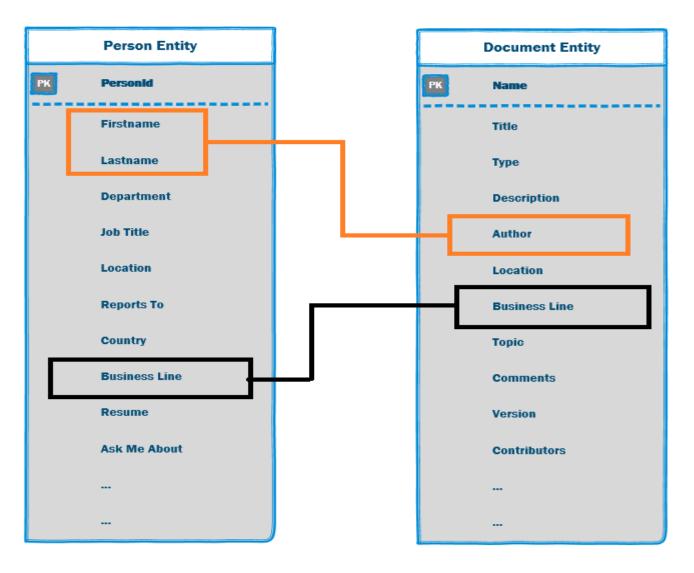




# Steps to developing an Information Model for search - People



# Steps to developing an Information Model for search



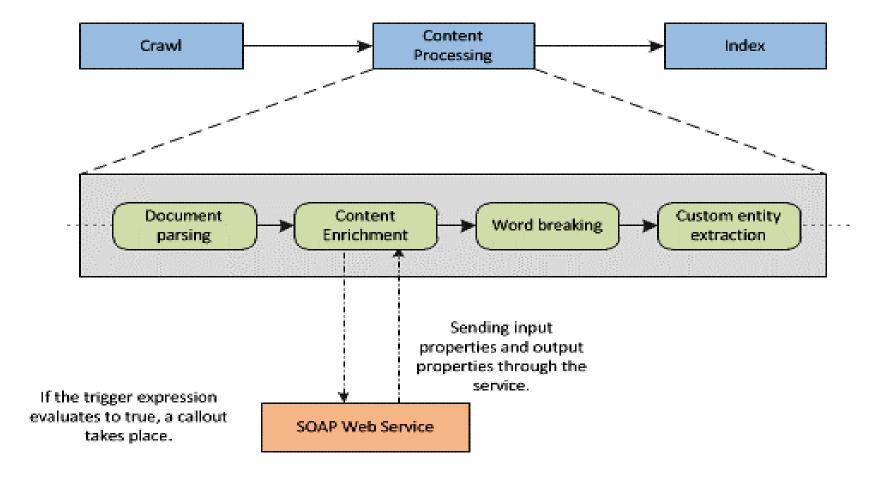
### Integration Points

- In order to build a good information model, content needs to be linked or associated.
- SharePoint 2013 provides a content enrichment stage where the ability to lookup and further enrichment and\or tag content is made possible.



## Integration Points

Content Enrichment Web Service



### **USER EXPERIENCE**

## User interview summary

### Challenges with Search...

...from the user perspective

- "Too many results"
- "I cant find anything"
- "Not enough options on search page"
- "Results are not relevant"
- "Inconsistent and disjointed user experience"
- "Little confidence in finding relevant knowledge"
- "Want ONE search"
- "Search is not intuitive"





### Challenges with Search...

...from the IT\business perspective

- "Search has been abandoned"
- "No ROI"
- "Business productivity and collaboration is severely hampered by poor search capabilities"
- "Search is complex to manage"
- "No internal search expertise"



"I want make the knowledge at my organisation more accessible for my co-workers, because I know what they are looking for is out there, but they can't find it."

### Kevin Knowledge

#### How he works

Work situation Kevin is the only person in his team with his type of position.

Assignments Looking after engineering technical standards and good practices, and

assists in getting information into the Knowledge System. Facilitate Networks and Lync Sessions; for seven disciplines each month, divided

into three time zones.

Cooperation Is responsible for making sure 20 000 engineers and designers are

sharing their knowledge. Facilitates software collaboration.

#### User need for search

Motivation

- 1. I dream of a single point to search from
- I want to help my newly employed co-worker find documents explaining more about "Pump calculation"
- 3. I want to help my co-workers find our experts on "Pump calculation"
- I want to make sure we are just sharing the right standards, and not old, expired ones
- 5. I want to make our discussion board more accessible

Source of information WP Wikipedia. SharePoint Locations sites. SharePoint Project sites. Network drives.

People are looking for both documents, tools and experts.





Age Role

37

Global Engineering Standards Coordinator in

Contoso

Background Six years in Contoso.

Previously worked as a Chemical Engineer. 3 years' experience in structural dynamics.

## INFORMATION SEEKING MODES

## Strategy to establish the information marketplace

- Discover the search modes of the user.
  - Precision search
  - Explorative Search
  - Overview Search
  - Repetition Search
- Implement Search patterns that fit the modus
- Tap into mental models



THINKING IT WAS JUST AN OLD SAYING...JETHRO ACTUALLY FOUND THAT FAMOUS NEEDLE IN A HAYSTACK.

### Precision

- Fact finding
- Usually short lived tasks
- Completed over a single session
- Example: weather, taxi, phone number, citrix



### Exploratory/Discovery

- Have some idea of what they need to know
- May take a length of time
- Not clear when the task is completed and there is not always one specific answer
- Example: Looking for or researching information on a new topic, finding information to help deliver a training course

### Overview

- Serendipitous task where users do not often know exactly what they need to know.
- Users are led by the search results, e.g. best bets or promoted content.
- Example: User may need to know about available library books on the topic of search driven apps but may come across a classroom training that they can register for. Best Bets

### Repetition/Re-Finding

- Users searching for information they know is available or have seen before
- Example: Searching for a document because you placed it on the system but cannot remember where.

Wireframes

## **APPLICATION MANAGEMENT & SEARCH GOVERNANCE**

## Application Management Service

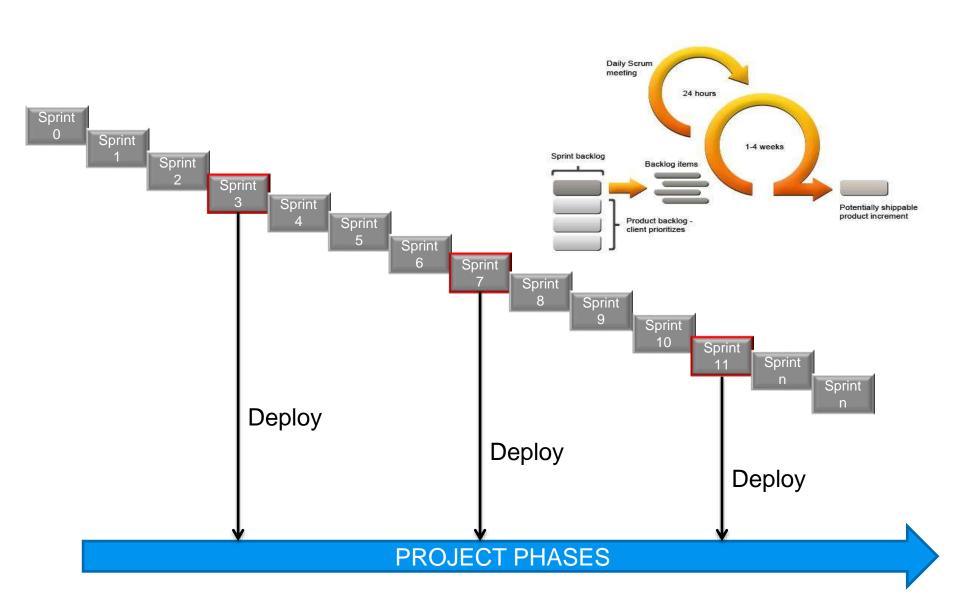
- AMS
- Search Service Desk
- Search System Monitoring
- Search Analytics
- Training of Users
- Revisit relevancy models

### PROJECT METHODOLOY

### Approach

- Identify Quick Wins first!!!
- Agile Methodology
  - Product Backlog
  - Number of Phases
    - Each phase 3-4 Development Sprints
    - Each Sprint consisting of
      - Sprint Backlog
      - 3 Steps
        - » Step1 Crawl & index content
        - » Step 2 User Testing
        - » Step 3 Adjust search experience

### Project Methodology



### **THANK YOU**