

Search. Observe. Protect.

Welcome to a new state of find:

Unified search for finding workplace content

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Overview

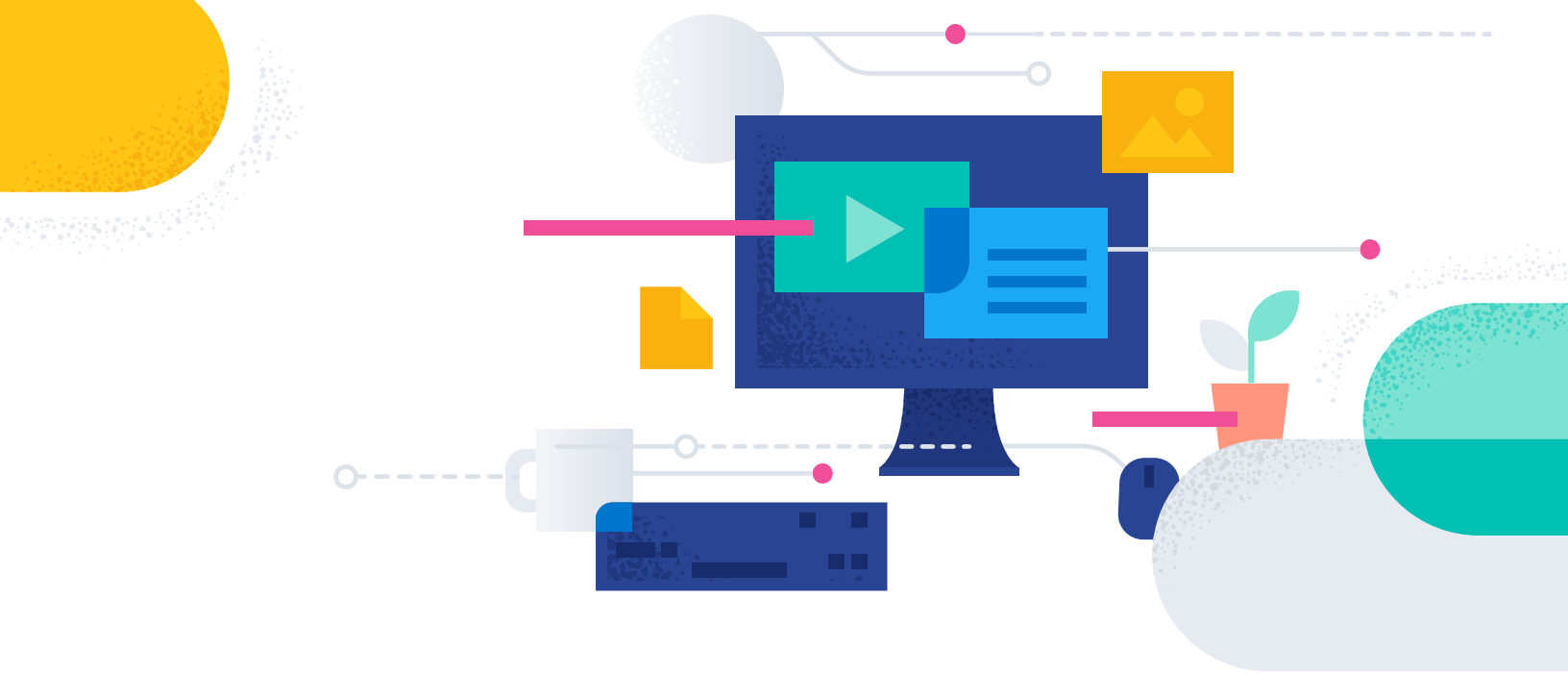
When teams can readily find the critical info they need, when they need it, it frees them up to focus their attention on getting work done. Time spent searching for information is less time spent strategizing, designing, creating, and implementing. With the right information in hand, easily findable, teams can make better decisions and drive key business outcomes.

54% of US office professionals surveyed agreed that they spend more time searching for documents and files they need than responding to emails and messages.

Source: Wakefield Research — recent survey of 1,000 US office professionals

With more and more cloud tools helping to create more great content, data, and information than ever, this guide aims to:

- Help you identify content findability issues in your workplace
- Offer practical guidance for evaluating and rolling out a search solution to improve findability



Defining the scope of findability issues

Modern workplaces are technological marvels — and all that technology produces enormous amounts of data, documents, and information. The ongoing challenge is ensuring that all your teams can readily and effortlessly find the info they need to do their jobs effectively. Defining and measuring the extent of findability issues among your teams helps to quantify the value a unified search solution can bring.

Is it a content problem? Or a findability problem?

Perhaps your team is complaining that they lack information or assets. But often, they're probably just having difficulty finding perfectly good content that already exists. Before you decide to create even more content (that will likely also be hard to find), you may want to focus on addressing the findability issue instead with a unified search solution. And as an added bonus, that same tool can help point you to genuine content gaps that you can more easily fix.

Content and tool overload

There are a dizzying number of productivity and collaboration tools out there. All those purpose-built cloud apps are how modern work gets done. But collectively, the amount of data, documents, and records these apps produce can start to get overwhelming. Finding essential info among all those apps is anything but easy. We know that those important docs, PDFs, spreadsheets, wiki pages, Salesforce sandboxes, support tickets — and on and on — exist out there in the cloud, but will teams be able to find them when they really need them?

According to a 2019 study by McAfee, the average enterprise uses 76 distinct file-sharing cloud services.

And what about legacy apps? Many orgs are still pretty reliant on information generated in these older apps, which often lack the modern search experiences we've grown accustomed to. Trying to search without typo tolerance, auto-suggestions, and result filtering, for example, seems downright archaic. Results relevance tends to be sketchy at best.

Context switching + fragmented search experiences

Some, but certainly not all, modern apps have pretty decent native search experiences. But those experiences aren't all that helpful if we can't recall where we saw the information we're looking for. So we end up jumping from app to app to repeat the same search, which is an inefficient and time-consuming process. It also requires constant mental resetting — trying to remember all the nuances of dozens of different UIs and disparate search experiences. Obtaining the best, most relevant search results becomes a lot more difficult.

In today's always-on digital workplace, on average people switch between 13 tools an average of 30 times per day. — Asana Anatomy of Work Index 2021

The challenges of virtual workplaces

Workplaces that are increasingly virtual have further complicated how we track down information. Traditional office environments make it easy to lean on colleagues for assistance with finding things. Getting help is as simple as asking a neighbor or having a quick conversation by the coffee machine. Face-to-face, in-person communication naturally facilitates connecting and sharing information.

In virtual environments, those informal, spoken connections are much more difficult and infrequent. They're instead replaced by conversations within Slack, Gmail, Google Docs, Salesforce, and the like. All are handy apps for sure. But they further broaden the digital breadcrumb trails we have to follow to find what we're looking for. And efficiently following those trails requires search.

Q Regarding your company's ability to support remote work in the future:
How important is being able to quickly find the files and documents you need?

A
57% ranked it as a top three problem to solve

Source: Wakefield Research — recent survey of 1,000 U.S. office professionals

And given that many orgs are a blend of in-office and virtual, do all employees have equal access to information? Are team members working virtually more likely to feel like they're unable to find info as readily as their in-office teammates?

Wasted time and duplicated content

All this lack of findability can be a real drain. A study by Asana uses the phrase “work as work” — all those tasks we do each day that don’t actually contribute to our key objectives. Constant searching for information certainly falls into that category. And when we ask colleagues for assistance, more time gets consumed as others join in on the search efforts. Frustration mounts, morale suffers, and productivity lags.

Making matters worse is when folks give up on finding a doc and just recreate it themselves. The fallout of content duplication is twofold:

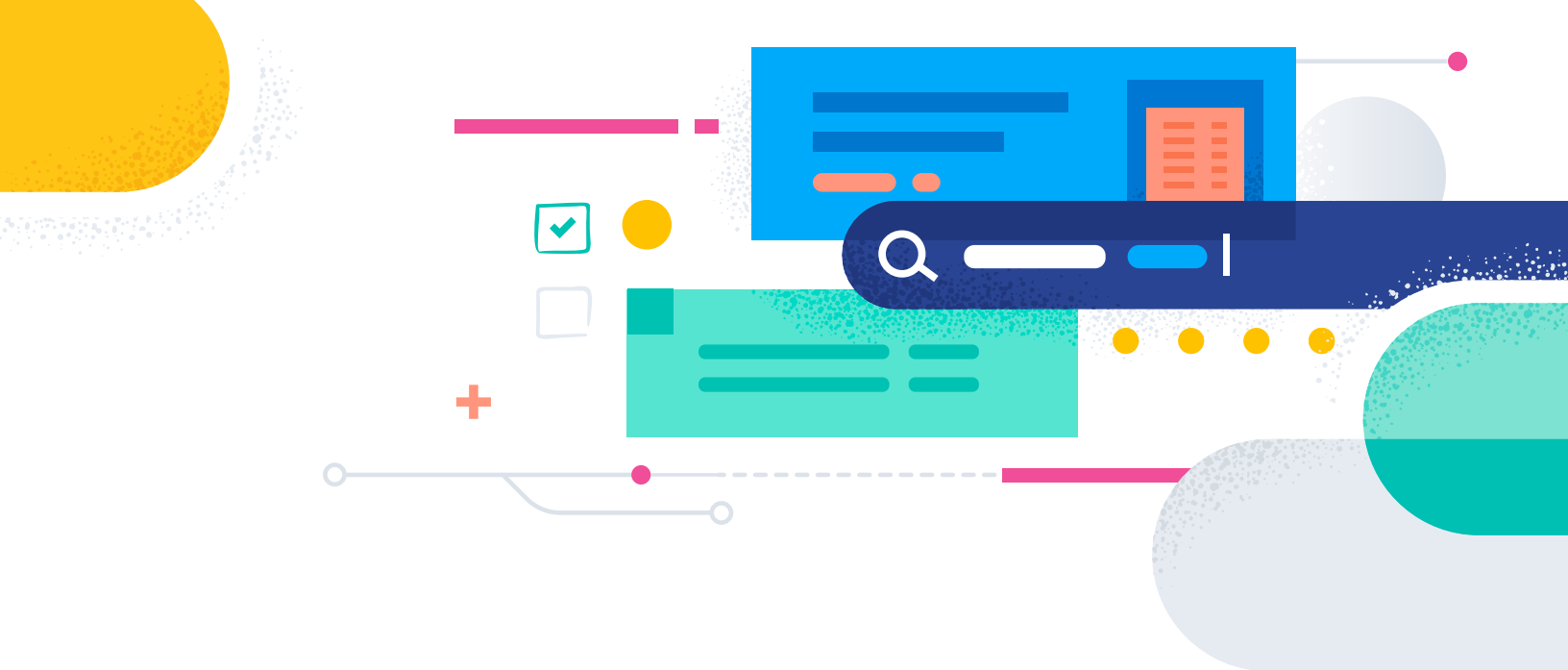
- Time is wasted on the duplicated effort.
- Version control, and completeness of information, becomes a problem. Different teams might now be operating off of different documents. Outdated or incomplete data might then lead to compromised decision making.

It’s easy to see the downstream effects of multiple copies of information. Which doc is the real source of truth? Are other teammates aware that multiple copies now exist? Is the correct, accurate information being shared with others, or is it the duplicated version?



So, what now?

The question then becomes, what’s the best way to tackle content findability issues? How can you help teams keep their most important content at their fingertips? What tools can help them surface the most relevant content needed to solve problems, complete tasks, and make better, more informed decisions?



Find, refined: What a unified search solution provides

So you've established that the experience of finding content is subpar — what's next? A unified search solution.

What exactly is unified search? The simple answer is that it's a single search bar for your most-critical content — a one-stop answer shop, if you will. With unified search, you can search across all your productivity, collaboration, and storage tools all in one place. Ideally, the search solution is

- **Relevant:** Top-ranked content is surfaced across all the indexed sources, in a single, unified set of results.
- **Personalized:** Different teams rely on different tools to different extents. The ability to set up customized prioritization of tools is essential.
- **Secure:** Proper document and record security keeps the right eyes on the right content.
- **Scalable:** A solution that seamlessly scales provides versatility and peace of mind as your search needs grow.

Satisfied searchers

We've all become pretty accustomed to excellent, consumer-grade search experiences. Netflix, eBay, Uber, and many others provide the kind of high-quality, personalized search that quickly yields the relevant results we expect. So it's disappointing when we don't have the same caliber of search at work.

We'd all just like search that works, finds exactly what we need, and lets us get back to our jobs. It's frustrating to deal with inadequate search. Great search isn't just a nice-to-have, it's an essential.

Return on investment

The return on a high-quality search solution is pretty apparent:



Reduced content duplication and rework



Greater employee satisfaction



Improved productivity



Informed decision making

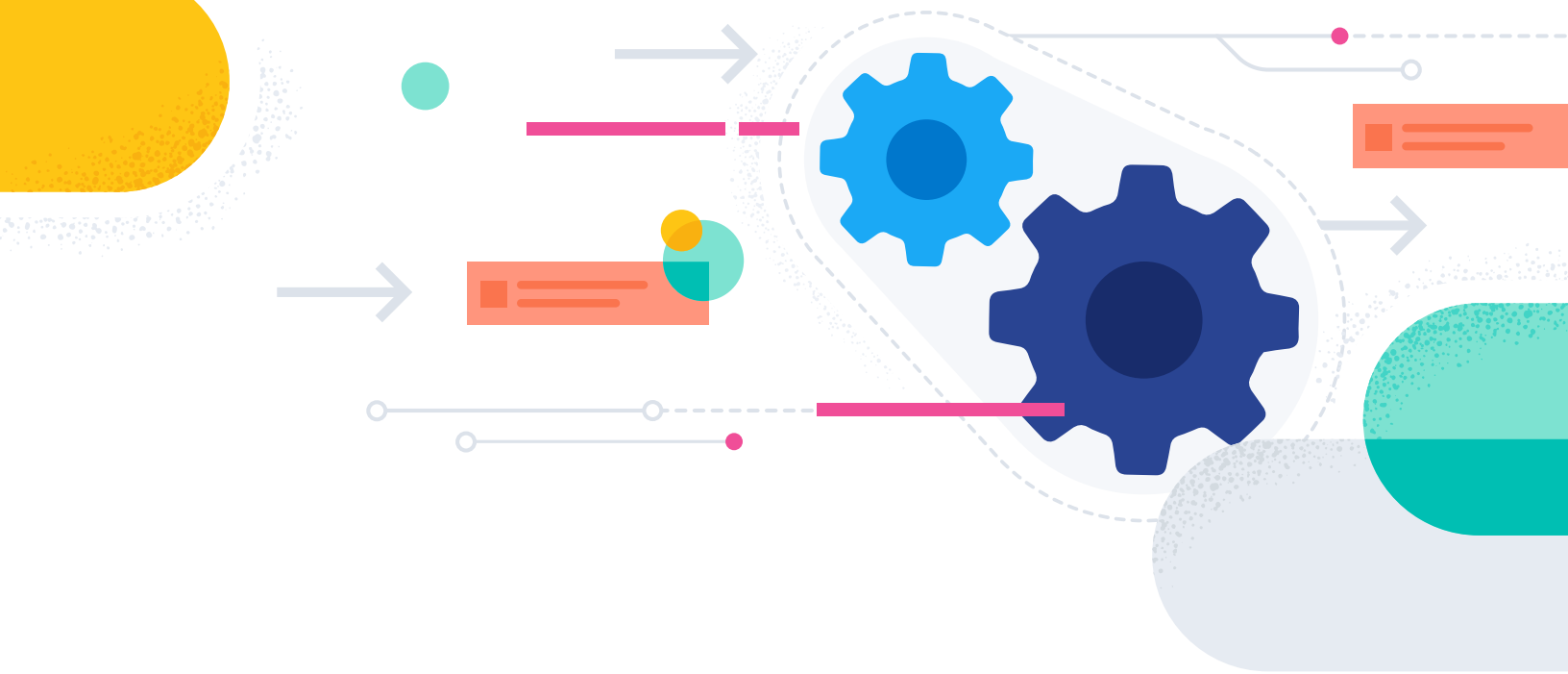
By reclaiming all the hours lost to searching, you empower your teams to efficiently tackle the tasks at hand, armed with the data they need.

According to SHRM, one of the top five drivers of employee engagement is to supply the right tools for people to work effectively.

Vendor criteria

So if you choose to buy rather than build, selecting the right search solution hinges on a number of factors. Let's take a quick look at some of the key criteria that can help form your decision:

- ✓ **Evaluation options:** Are hands-on downloads and trial periods available to test drive the solution, including testing scalability?
- ✓ **Underlying technology:** What powers the search solution? Does the vendor have a strong reputation and history of innovation?
- ✓ **Deployment flexibility:** Is it deployable where you need it to be, whether that's on premises or in the cloud, or in a particular geographic region?
- ✓ **Connectors:** Does it have prebuilt content source integrations with your most used productivity, collaboration, and storage tools? Does it provide connectivity to homegrown and legacy apps?
- ✓ **UX/UI:** Is the interface user friendly, and more importantly, one that serves relevant results? Does it have easy-to-use administrator dashboards?
- ✓ **Insight and analytics:** Does it include out-of-the-box search analytics that offer insight into what your teams are searching for and point to content gaps?
- ✓ **Pricing:** How does the pricing model fit in with your expected search usage? Is the pricing built to scale cost effectively?
- ✓ **Timeframe to implement:** What is your expectation for speed of implementation? Will installation require services contracts?
- ✓ **Ability to scale:** As your search needs grow, can the solution scale easily and effectively?



Best practices for implementation

Once you've selected a solution, here are a few general tips to help smooth its implementation and adoption.



Clutter in, clutter out

This is more of a general best practice: Try to clean up and organize the content sources you plan to index. By archiving and/or deleting old and unneeded information, you sift out much of the clutter that can muddy search results. Regardless of search solution, clutter reduction in your content store can pay real dividends in findability.



Starting small

Before widespread rollout, recruit a group of beta users. Select participants from a broad group, with representation from a wide cross-section of teams. This initial group of users will help to stress test the experience and provide a targeted feedback loop. Learnings from this group will help to identify any need for additional training, enhancement requests, or tweaks to the experience.



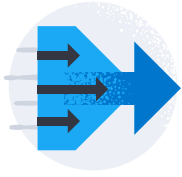
Buzz building

Be sure to hand-pick a few potential evangelists for your beta group. You know the ones: the folks likely to champion your new solution informally and tell others. Use viral internal marketing to your advantage and create hype and demand before you even launch to the wider organization. And it helps to give your beta group a cool team name.



Focused ambitions

Limit the initial rollout to a few critical, strategically chosen sources of content. Ideally, choose sources with prebuilt connectors, so you can get quick results without a heavy technical lift. By starting small, you avoid overwhelming users with every possible content source they might use. You also create early wins by creating momentum and excitement for the new search experience. As users get more familiar with the product, you can continue to roll out additional requested sources in a progressive manner.



Making it easy

Most important of all, your teams shouldn't have to learn a new language, become data scientists, or take lots of training just to learn how to find their content. Whatever internal search solution you choose, make sure that it's intuitive and easy for both users and admins to use. Otherwise, you'll likely never get the critical adoption levels you need for it to be truly beneficial. And if you can, put it right into their existing workflow alongside their regular tools or drop it in their regular web browser to make it extra easy.



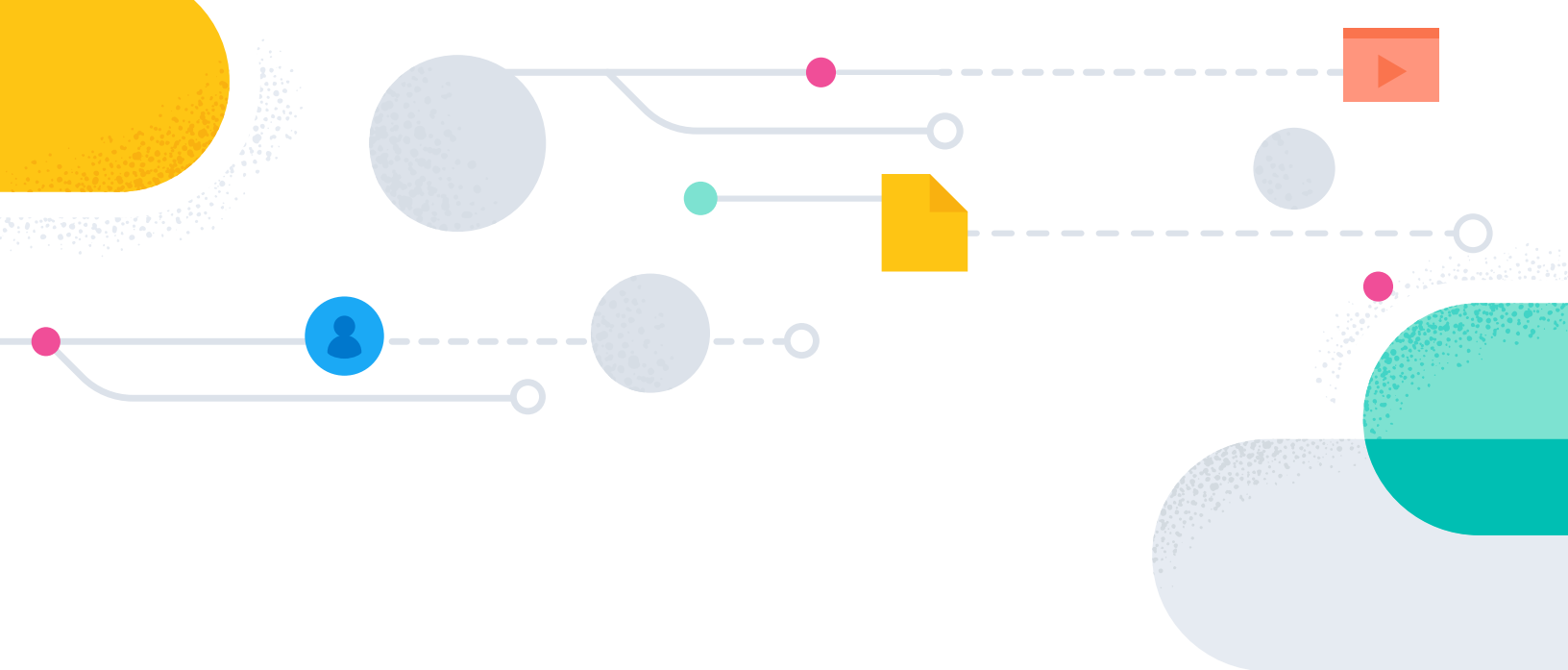
Listening and learning

By setting up numerous methods for feedback, you maximize opportunities to hear how the experience is working for your teams. User surveys, a dedicated messaging app channel, the company wiki, internal presentations, and tutorials are all great means for folks to provide opinions and recommendations. Collecting all this information can help you optimize and personalize the experience.



Analysis and action

Use available analytics to gain better understanding of how people are using the solution. Combined with direct user feedback, seeing the analysis of what they're finding or not finding, clicking on or ignoring, will help to further optimize the experience. It also helps to identify and fill any gaps in content or information that many users might be seeking.



Next steps? Take a look at Elastic Workplace Search

Elastic Workplace Search can help you dramatically boost content findability with an easy-to-implement, highly relevant, unified search solution for all your teams. Prebuilt content source integrations to your favorite productivity, storage, and collaboration tools make it easy to get started.

Try Elastic Workplace Search on Elastic Cloud (14 days free, no credit card required). Or, download and deploy it on-prem, where it's always free.

[Try Elastic Workplace Search](#)



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Elastic makes data usable in real time and at scale for enterprise search, observability, and security. Elastic solutions are built on a single free and open technology stack that can be deployed anywhere to instantly find actionable insights from any type of data — from finding documents, to monitoring infrastructure, to hunting for threats. Thousands of organizations worldwide, including Cisco, Goldman Sachs, Microsoft, The Mayo Clinic, NASA, The New York Times, Wikipedia, and Verizon, use Elastic to power mission-critical systems. Founded in 2012, Elastic is publicly traded on the NYSE under the symbol ESTC. Learn more at elastic.co.

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