

CASE STUDY CAFE

DAY 1

You will be able to attend in-depth table discussions on three of these cases on Day 1. The case outlines are provided to help you decide which case discussions you would like to attend.

1) AGNES MOLNAR

Next Generation SharePoint: Office Graph, the technologies it powers, and the opportunities and challenges that follow

1. About the Case Organization

The organization of this case study is a global software development company, headquartered in the US. Their main assets are their software and the special knowledge behind.

2. About the Challenge

The company has a very special domain of knowledge which is very hard to track. Also, their teams are dispersed in several offices around the world. Sharing knowledge as well as finding or even more discovering knowledge in the company has been always one of the biggest challenges.

Although this company has been having a very strong Enterprise Search implementation, it was still not enough for all their knowledge discovery scenarios.

3. What We Did

Since the customer had already migrated most of their content to Office 365, it was obvious to leverage the benefits of Office Graph and Delve. Although these new, revolutionary tools are brand new releases from Microsoft, the POC was very successful. The users started to be able to discover important knowledge management content - which made their existing search-driven experience fuller and richer.

4. Challenges and Lessons Learned

The main challenge was (as always) the content readiness: we had to make sure everything is stored properly. As a side-effect, the improvements on the content made their Search-Driven Application better too, although this was not the main object of the project.

The second challenge was to teach the users how to use this new approach and toolset, and how to combine with and differentiate from the common search experience. Although the user experience in Delve is very ergonomic and easy-to-use, the algorithms behind it and the structure of Office Graph is very challenging to explain - therefore hard to set the expectation bar.

The third challenge still remains, although we'll be able to solve this very soon. Namely, the Office Graph cannot be "customized" today. It consumes signals from Office 365 sources only, for a specific set of content only. With the upcoming updates, we'll be able to send signals from custom sources, and this will enhance its value even more, very soon.

5. Impact and Benefits

In general, thanks to the very good and easy user adoption, the project is already successful, even in this early phase of the supporting tools. Working in any industry, the value of Office Graph and Delve is unquestionable - I have seen very similar success stories in global manufacturing and pharma industries, too.

Usually, the adoption cycle of new tools like Office Graph and Delve is much longer. In my opinion, the main reason of these early success stories is the gap these tools fill - they give the enterprises not a new tool, but a new approach as well, which helps the users get their job done much more effectively.

6. Next Steps

As a next step, we'll definitely start using the upcoming enhancements, like sending new signals to Office Graph. Being able to add on-premises content to the Graph will make a significant increase in its value. Also, we're investigating in what kind of custom application layer would fit the customer's special needs, besides Delve's out-of-the-box experience.

2) AHREN LEHNERT

Using text mining and analytics to improve the search experience and enterprise taxonomy for an oil and gas products and services company

1. About the Case Organization

FMC Technologies is an oilfield equipment and services company based in Houston, Texas specializing in Subsea Technologies, Surface Technologies, and Energy Infrastructure. FMC Technologies has more than 18,000 employees in 24 facilities around the globe.

2. About the Challenge

In our move from six separate search instances in four separate SharePoint farms to a single instance of SharePoint 2013 search, we needed to consolidate search terms and phrases from across the globe to seed typeahead search suggestions, gather terminology for taxonomy development for automatic categorization, and develop singular "best bet" locations for common activities.

Prior to our approach there was no single search instance or singular reporting on search queries providing insight into the types of information being sought by employees across the globe. The search experience was confusing and fragmented and search results were poor. Additionally, there was no common controlled vocabulary for metadata values applied to all searchable content, resulting in a fragmented information retrieval experience. The new search implementation and use of the FMCTI Taxonomy for the automatic application of metadata affects all SharePoint users at FMC Technologies since SharePoint is the platform for our Intranet.

3. What We Did

We collected all search terms and phrases from the various search instances, regularized the output by consolidating duplicates, correcting corruptions in the information output, and eliminating search term noise. We then analyzed the final, consolidated list of search terms and phrases, looking for patterns in the information to further develop the FMCTI Taxonomy and determine best bet locations for promotion in search results.

Our Intranet platform consists of four, separate instances of SharePoint 2010 and our new single search tool is SharePoint 2013 search. We use Smartlogic Semaphore to manage the FMCTI Taxonomy, for text mining, and auto-categorization. We used SAS JMP Text Miner for search term analysis. There were no standards applied to the analysis, but we use various terminology standards for the creation of terms for the FMCTI Taxonomy.

The innovation in this approach was that lack of consolidation and reporting prompted us to use other analytical methods to understand better the search needs of our employees globally. Rather than reacting to what we believed or assumed people were searching for or extending our learnings from earlier user behavior testing, we used real data to arrive at an understanding of the actual topics users were seeking in content.

4. Challenges and Lessons Learned

Our main challenge was extracting and consolidating data from disparate sources due to duplicate searches with separate forms and counts, searches in multiple languages, and corrupted information in the output. Once we are on a single search, analysis of search terms will be easier as the search counts will be consistent. Multiple language searches will continue to be a challenge, but we will map common concepts to a single English term form to facilitate information retrieval in multiple languages.

Lessons learnt:

There is such a thing as too much analysis. Sometimes having a broader view of the information is better than having detailed, nuanced results. We will spend less time on initial analysis and more time on regular analysis in smaller chunks over greater periods of time.

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Agnes Molnar

Enterprise Search Consultant, CEO

Search Explained









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Introduction – Agnes Molnar

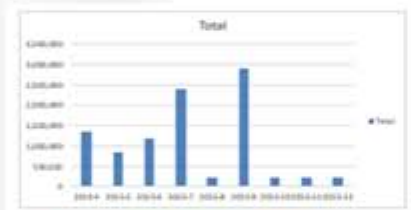


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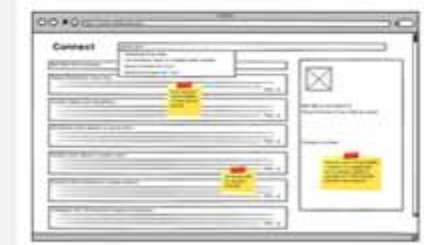
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Challenges and Lessons Learned

Challenges:

- ❓ Content Readiness
- ❓ User Adoption
- ❓ UI Customization

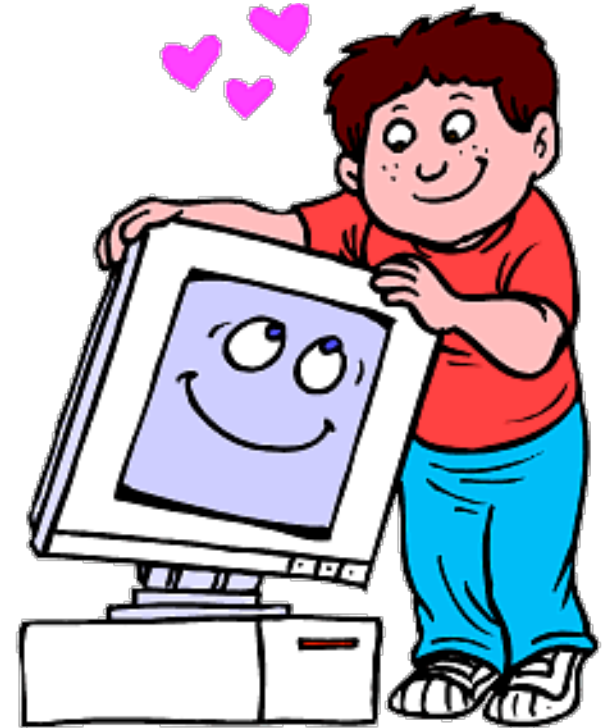
Lessons Learned:

- ✅ More mature content → success in the project
- ✅ Side effect: more efficient Enterprise Search
- ✅ Combined with Enterprise Search is a winner
- ✅ Structure and algorithm behind: hard to explain but needed for user adoption



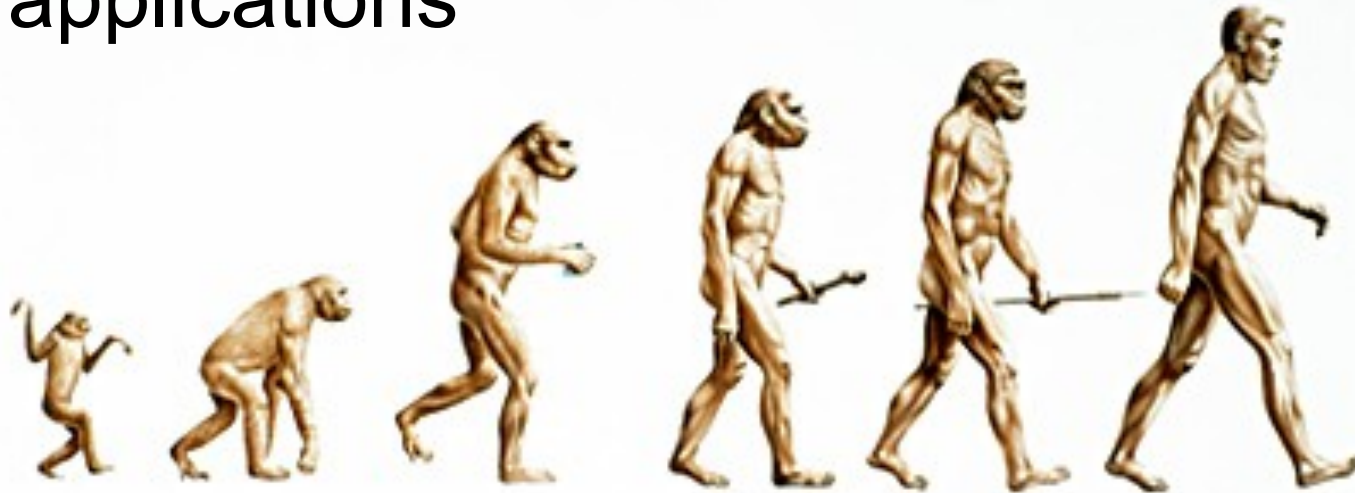
Impact and Benefits

- Quick and easy user adoption
- New tool, new approach
- More efficiency
- More collaboration
- More creativity



Next Steps

- Continuous Updates & Enhancements
- More content
- UI customization
- Custom applications



THANK YOU!

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