



# Help Center Search Implementation Checklist

15 steps to a smooth implementation

Adding search to your help center consists of four phases: planning, implementation, testing, and maintenance. Learn what steps are required during each phase, along with best practices to ensure a smooth implementation.

Reading time: 15 minutes

## Getting started

Is your company ready to implement powerful [search for your help center](#)? Although you may be eager to get on the road to better search results and more satisfied visitors, you'll save yourself a lot of time and frustration if you take a look at some of the [technical challenges](#) involved in implementing search, as well as follow what has worked for others in the past.

In this guide, we've gathered 15 of our best implementation recommendations in one checklist, covering each of the four phases of search implementation. The required steps within each phase vary widely between the three implementation types: using native, out-of-the-box CMS search; buying hosted search; or building search with open-source components. On the page that follows, we've put together a chart comparing these three options, with more in-depth explanation of each step on the pages that follow.

### Four phases of implementing search

1	<b>Planning</b> Allotting resources, gathering team members, setting timelines
2	<b>Implementation</b> Indexing content, configuring servers, front-end coding
3	<b>Testing</b> Evaluating, customizing, and tuning your search experience
4	<b>Maintenance</b> Optimization, operations, and ongoing refinements

# Help Center Search Implementation Checklist

Build vs. buy: Exploring options

IMPLEMENTATION TYPE:	CMS SEARCH	HOSTED	OPEN-SOURCE
<b>Planning</b>	is this step necessary?		
1 - Choose implementation type	✓	✓	✓
2 - Gather your project team		✓	✓
3 - Design your search experience	⊘	✓	✓
4 - Determine project timeline		✓	✓
5 - Develop your training plan		✓	✓
<b>Implementation</b>	is this step necessary?		
6 - Index website content		✓	✓
7 - Configure servers and operations			✓
8 - Complete front-end design work	⊘	✓	✓
<b>Testing</b>	is this step necessary?		
9 - Test top queries	⊘	✓	✓
10 - Test the speed of your search	⊘		✓
11 - Test common language issues	⊘		✓
<b>Maintenance</b>	is this step necessary?		
12 - Keep pace with software updates			✓
13 - Monitor traffic volume and speed			✓
14 - Watch your KPIs	✓	✓	✓
15 - Optimize search performance	⊘	✓	✓

⊘ = not possible

## Planning Phase

Allotting resources, gathering team members, setting timelines

### Step 1: Determine your implementation type

The first step to a stress-free search implementation is to know which kind of implementation will work best for you. This means knowing what you want from your search, as well as which resources you have available to you.

CMS search	Hosted search	Open-source search
No work required	No back-end work	Need to buy servers
Cannot customize interface	Little engineering required	Heavy engineering required
Weak text analysis technology	Built in relevance and language processing tools	Advanced relevance requires intensive development work
Unable to customize search results	Customizations can be made in a web based dashboard	Customizations require technical resources
Weak analytics dashboard	No maintenance issues	Ongoing maintenance costs

Considering using your existing CMS search? Although an out-of-the-box option might seem like the easiest choice, remember that you may not have the ability to customize your search to help users find what they need quickly.

Another option is to build search using open-source components. Although open-source gives you the most control over how your search engine algorithm works, building this system is a highly challenging technical process which often requires a team of dedicated engineers. In addition, building search on your own means owning search moving forward – a process which entails ongoing software updates and server maintenance. Finally, any changes you or your team want to make to search will require engineering time.

If you don't have a lot of resources, and can't spare the time or manpower to build your own search, a [hosted search solution](#) may be the answer. With this option, you can leave software updates and server maintenance to the experts, but still maintain control over your search experience so you can deliver the fastest, most relevant results. Hosted search options also provide admin dashboards that allow non-technical team members to customize results, view analytics, and gain insight into how search is performing.

## Step 2: Gather your project team

In an ideal world, your implementation team should consist of your VP of Support to champion and lead the project; a software engineer for development work; a UX designer to build the front-end; and your customer service representatives and support content creation team, who can provide valuable input on search requirements. If you don't have technical resources at your disposal, you'll need to contract with a web development agency to do this work for you. If you are simply using a plugin, a large team will not be required.

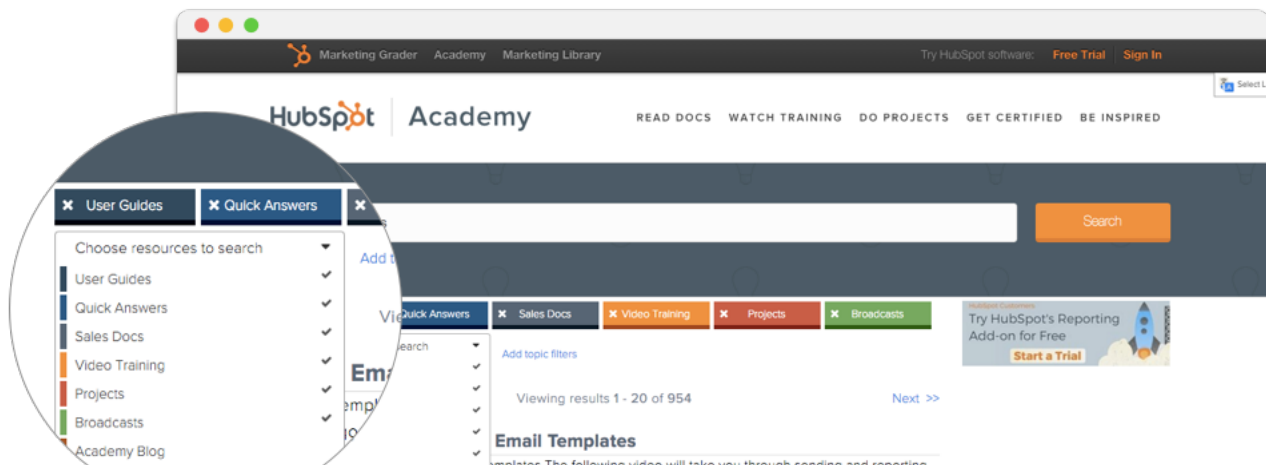


<b>WHO:</b>	VP of Support	UX Designer	Developer	Support Team
<b>WHY:</b>	Leadership	Design	Configuration	Input, buy-in

## Step 3: Design your search experience

If you are planning to use your CMS help center search, your options are highly limited. While some plugins may be available to improve native search, you will still be forced to accept whichever UX these plugins provide. Ultimately, if you want to build a search experience that is customized for your help center, you'll need to abandon your CMS search options.

The question then becomes: How do you want your customers to experience search when they visit your help center? Should they be able to search by topic, content type or date? Do you want to give them the ability to filter their results by tags or reviews? For every piece of information about a help article that you want to influence the user experience, you'll need to determine a method for indexing this piece of information from your website data (see step 6).



Because this step has such important implications for how the implementation process will unfold, your designer and key stakeholders should agree on a fully fleshed-out plan (including mock-ups, prototypes, etc.) before moving forward.

#### **Step 4: Determine your project timeline**

The timeline of your project will vary greatly depending on how ambitious your search redesign plan is. In general, hosted solutions take significantly less time than open-source projects, since no time is spent developing the back end search infrastructure (i.e. the algorithm and server networks) that underpins your search engine. For a comprehensive redesign of search, hosted solutions will take approximately one month to complete, while open source projects will take many more, not including the ongoing work of software updates and server maintenance. (To learn more, see the Maintenance Phase section below.)

#### **Step 5: Develop your training plan**

Be sure to include your customer support representatives in your training plan so they can understand how customers will be searching, as well as your support content creation team, who will need to know how to add new articles to your help center. Quick tip: Make sure your customer support representatives know the layout of your help center content so that they can also use it as a resource when interacting with customers.

### **Implementation Phase**

Indexing content, establishing operations, front-end coding

#### **Step 6: Index website content**

The first step in creating a search engine is indexing your website content. (If you are using your CMS search, then indexing is taken care of for you.) How you index your website content is dependent upon how you want your search to look and function, as was discussed in step 3. For example, if you want users to be able to search by content type, you'll need to index the content type as a field in your search engine schema. You'll also need to ensure that all new content is indexed in this format, which means appropriately mapping your CMS to your indexing structure.

How this process actually works is highly variable, and will differ from solution to solution. For example, if you're working with a third party provider, they may require you to pass website information using a data feed – a slow and complicated process that requires an FTP or CSV transfer. With Swiftype, you can get started indexing your content by simply

specifying a URL, and the web crawler will fetch your website information directly from your HTML. In addition, more advanced developers can pass website information directly to their search engine with the API.

Once your website content is indexed in a search engine, the next step is addressing performance and operational issues, then coding the front-end to render search results according to the plan set out in step 3.

### **Step 7: Configure servers and operations**

If you're building search with open source components, you'll need to monitor your servers to be sure you can handle higher traffic levels and dispersed geographies, as well as to resolve speed issues on a regular basis. If using a hosted solution, your service provider will do all of this for you.

### **Step 8: Complete front-end design work**

Your designers and front-end engineers should now be ready to build the user interface for your search. Because you've already agreed on the look and feel of your search in the planning phase, the major challenge here is establishing the communication lines between your back-end search index and front-end search interface, rendering results in the format and layout agreed upon by your team. Expect to allocate at least a week to complete this step, although it could take up to a month if your search redesign is especially complex.

## **Testing Phase**

Evaluating, customizing, and tuning your search experience

### **Step 9: Test top queries**

For open source and hosted search, you should test your top 50, 100 or more queries to determine whether or not results are relevant and match expectations. As you test these queries, you should customize search results and tweak the algorithm until your stakeholders are happy. If you are using your CMS search, you are stuck with results as they are.

### **Step 10: Test the speed of search**

This step only applies if you are building search on your own. Test your server response times. If server response times are slow in international markets, then look into adding

additional servers near those markets. Hosted solutions like Swiftype provision servers across the globe to ensure all users enjoy a fast and easy search experience.

### Step 11: Test common language issues

The best hosted solutions are built to automatically correct for common language issues, and open source libraries offer the tools to build in these tolerances on your own. Pay attention to how misspellings and phrase matching are handled, as well as stemming, bigrams, and dashes and spaces. If your search is unable to adjust accordingly, your visitors will experience empty results, and will quickly look elsewhere to find what they need. With a native CMS search, these language issues are often not tolerated.

#### Advanced natural language processing examples

Misspellings	corrects "templaet" to "template"
Bigrams	recognizes equivalence of "e mail" and "email"
Dashes and spaces	recognizes equivalence of "i-Phone" and "iPhone"
Stemming	recognizes equivalence of "start" "starter" and "started"
Phrase matching	distinguishes between "iOS 9 apps" and "iOS 8 apps"

### Maintenance Phase

Optimization, operations, and customization

### Step 12: Keep pace with software updates

If you're using an open source solution, you'll need to stay on top of ongoing software updates. Keep in mind that installing and testing updates could take up to a week or more of an engineer's time. No need to worry about updates if you're using a hosted solution, as your provider will handle all of this for you.

### Step 13: Monitor traffic volume and speed

If you are hosting search on your own, you'll need to provision and decommission servers as your traffic fluctuates. This process can be highly unpredictable and costly, and requires dedicated engineering supervision. As mentioned in step 7, you'll also need to buy servers around the globe if you're serving an international audience.

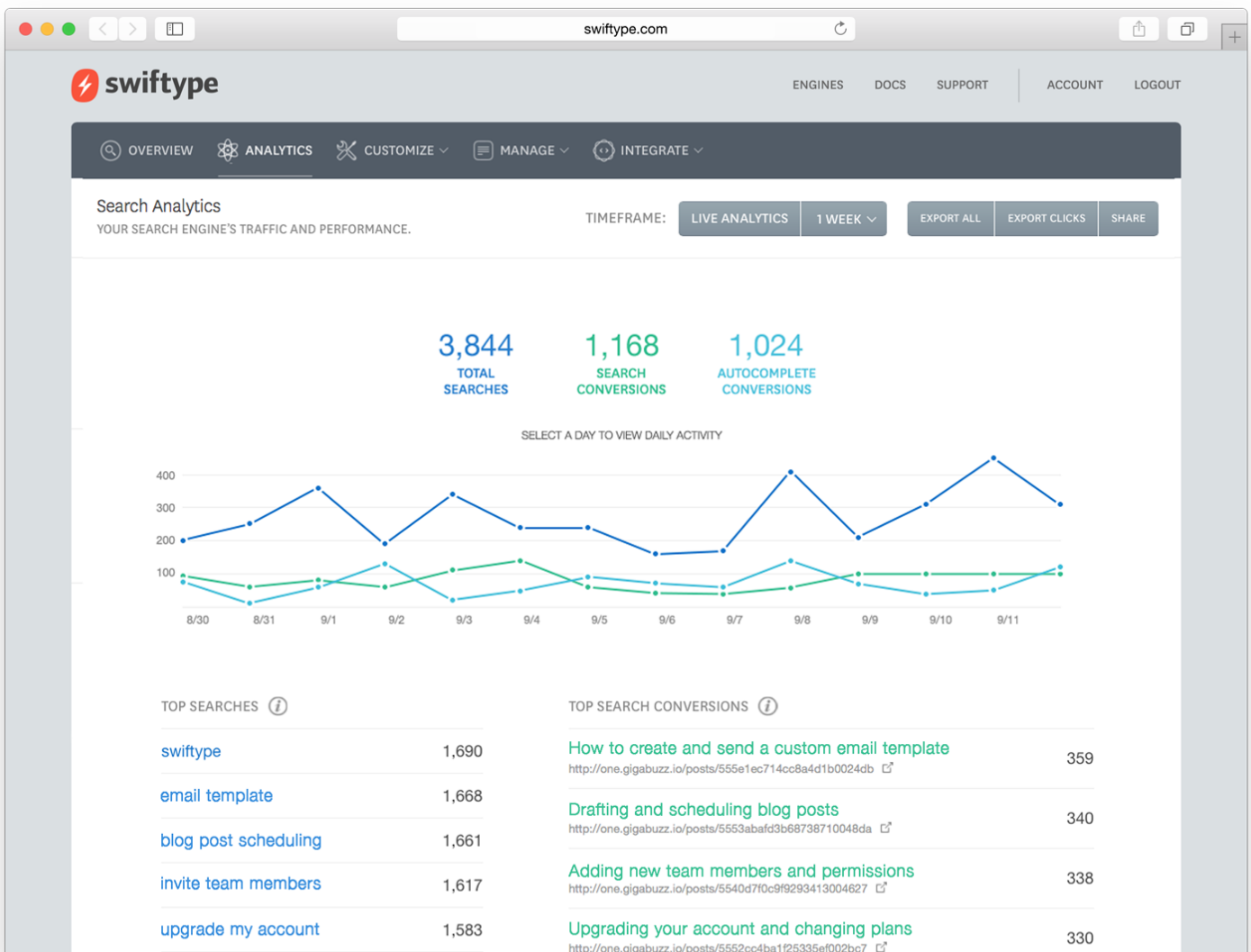


## Step 14: Watch your KPIs

Rather than monitoring a long list of metrics, keep track of only the KPIs that make the most impact for your company. These could include clickthrough rate, search exit rate, percentage of searches with no results, conversions, or other metrics. As you track and optimize search over time, you should closely watch how this impacts your case deflection rate and overall support burden. If you are building search on your own, these KPIs will include server response times, downtime, daily server costs, and more.



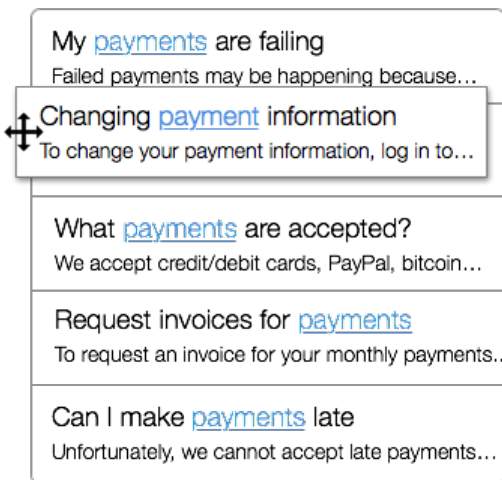
Swiftype's analytics dashboard provides detailed information about what users are searching for, how search is performing, and provides the tools to customize results for the particular needs of your users.



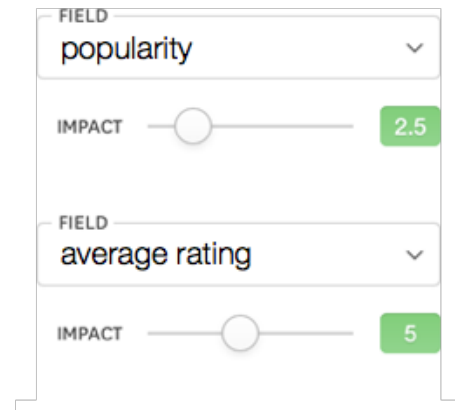
## Step 15: Optimize search performance

The best way to optimize your search is to continuously customize your search engine. Look at [analytics](#) regarding search behavior and rearrange search results to feature the most relevant articles. Identify searches that produce no results so you can refine and keep visitors from coming up empty handed and leaving your site. Finally, refine your algorithm in order to provide the most relevant results to visitors.

**Customize results** for individual queries to feature the most important articles.



**Tune your algorithm** to control what impacts the order of search results.



## Get started for free

Take control of your help center search and get started with a 14 day free trial of Swiftype.

[Start Free Trial](#)

## About Swiftype

Swiftype is a leading provider of search for websites and mobile apps, currently powering search for over 500,000 websites and applications across a wide range of industries—including major corporations Qualcomm and Dr. Pepper, leading publishers CBS Interactive and AOL, and top customer success-focused companies SurveyMonkey and Shopify.