
KNOWLEDGE ISN'T POWER
WHEN YOU CAN'T FIND IT



TABLE OF CONTENTS

- 3 [Project Personnel](#)
- 4 [Introduction](#)
- 6 [Employees Need Better Ways to Find Information](#)
- 10 [The Pandemic Year Amplified Existing Problems](#)
- 12 [Investments Is Growing, but Still Lags the Need](#)
- 17 [Search Improvements Have Real Impact](#)
- 22 [The Time to Fix Search Is Now](#)
- 23 [Survey Demographics](#)

PROJECT PERSONNEL AND COPYRIGHT

APQC PROJECT TEAM

PRINCIPAL RESEARCH LEAD, KNOWLEDGE MANAGEMENT

Lauren Trees

RESEARCH ANALYST

Megan McCulloch

STATISTICIAN

Saphra Cleveland

WRITER

Mercy Harper

GRAPHICS

Dillon Martin

Nikki Witt

RESEARCH SPONSOR



APQC
123 North Post Oak Lane
Third Floor Houston, TX 77024
www.apqc.org

Copyright ©2021 by APQC
All rights reserved.

“I CAN’T FIND WHAT I’M LOOKING FOR.” –A MEMOIR

For at least a decade, employees have struggled to understand why finding information at work is so much harder than it is outside of work. “Why can’t this be more like Google?” they reasonably ask, as they bounce between disconnected systems and dig through unsatisfying search results in a tiresome quest to find what they need. Most organizations’ search options have improved over the years, but not as fast as web-based search. Why? Because it’s not viewed as a big enough problem to fix.

Organizations’ search problems intensified in 2020. Remote work put more strain on the technologies that connect employees to information, knowledge, and one another. Many newly remote workers scrambled to find important documents stowed away on personal desktops, on-premise servers, and dusty corners of the company intranet. At the same time, a flurry of emails and messages made the enterprise information landscape even more complex and harder to navigate.

For all these reasons, now is a critical time to investigate the state of search and findability inside organizations.



What challenges and opportunities do IT and business leaders perceive?



Where are they investing time and money to accelerate development in the current climate?



What gaps and challenges remain unaddressed?

In 2021, APQC partnered with Sinequa, a leader in Intelligent Search, to survey more than 200 high-level knowledge management (KM) and IT leaders (director level and above) in large organizations (those with 10,000 or more employees) across North America and Europe. We specifically targeted people with a deep understanding of the current state of search inside their organizations and who were either responsible for or key stakeholders in knowledge and information management strategy. Our research goals were to assess:

- » current business priorities for information management,
- » the solutions in place and under development, and
- » how organizations define success for search and findability.

This paper outlines the major trends we see in terms of how organizations think about search, the investments they're making, and the results they are seeing and expect to see.



Sinequa is dedicated to helping large, complex organizations bring critical knowledge forward. Knowledge that helps employees not only find answers on a need-to-know basis but enables them to add significant value to their organizations. Given the major disruptions in 2020, Sinequa sought to understand how an intelligent search solution helped these highly disrupted organizations, along with the impacts of not having one in place. Through this report, they aim to provide valuable insights on the strategic direction that knowledge management leaders are taking, and how their priorities continue to evolve through these unprecedented times.

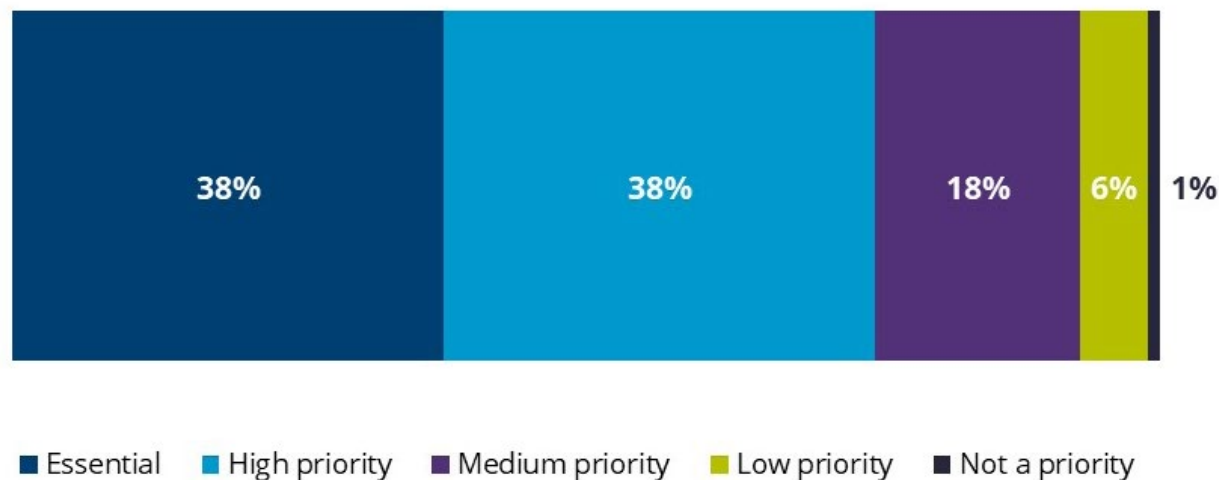
EMPLOYEES NEED BETTER WAYS TO FIND INFORMATION

Search has always been critical to how knowledge moves through organizations, but the goalposts for “what good looks like” have shifted over the years. Like other enterprise technology trends, user expectations and sentiment tend to follow what people experience in B2C solutions. For example, employees aren’t clamoring for better workplace email tools because their personal email client isn’t much different or better. But the gap between consumer search and the typical workplace search experience has grown wider each year. Employees who used to put up with clunky, disconnected systems are increasingly demanding something better. But are KM and IT teams really listening?

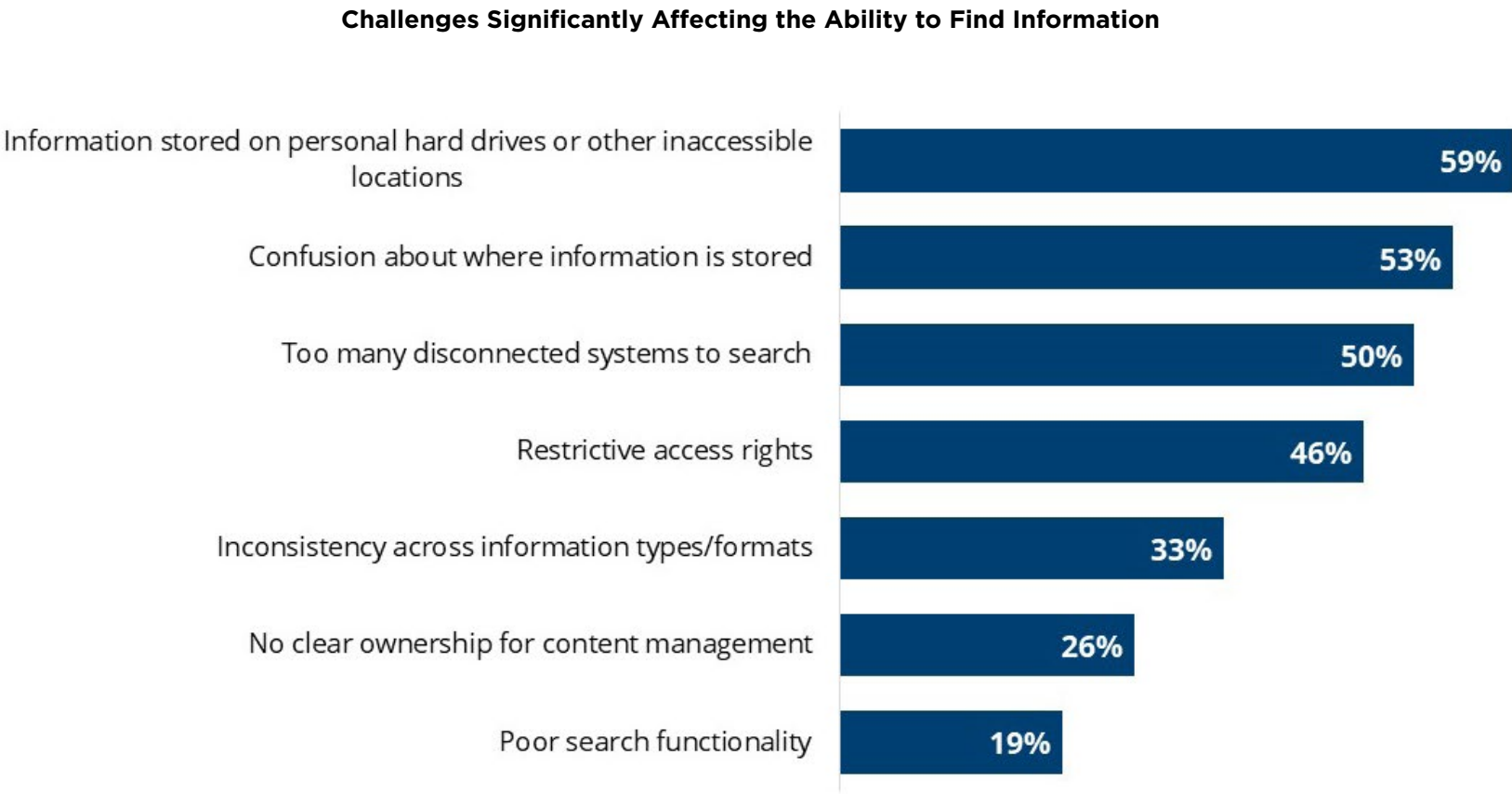
The vast majority—84 percent—of KM and IT leaders surveyed by APQC and Sinequa say their employees are generally satisfied with their ability to find information. Two out of three said employees think it’s easy or very easy to find people and expertise. At first glance, these findings paint a rosy picture of the current state. But when you start to scratch the surface, cracks emerge.

Even though employees are theoretically satisfied, most IT and KM leaders recognize that there is much more work to do. Three out of four respondents rate improving users’ ability to find information as an **essential** or **high priority** (Figure 1). This suggests a major gap between what’s needed and what’s currently implemented.

How Big of a Priority Is Improving Users’ Ability to Find Information?

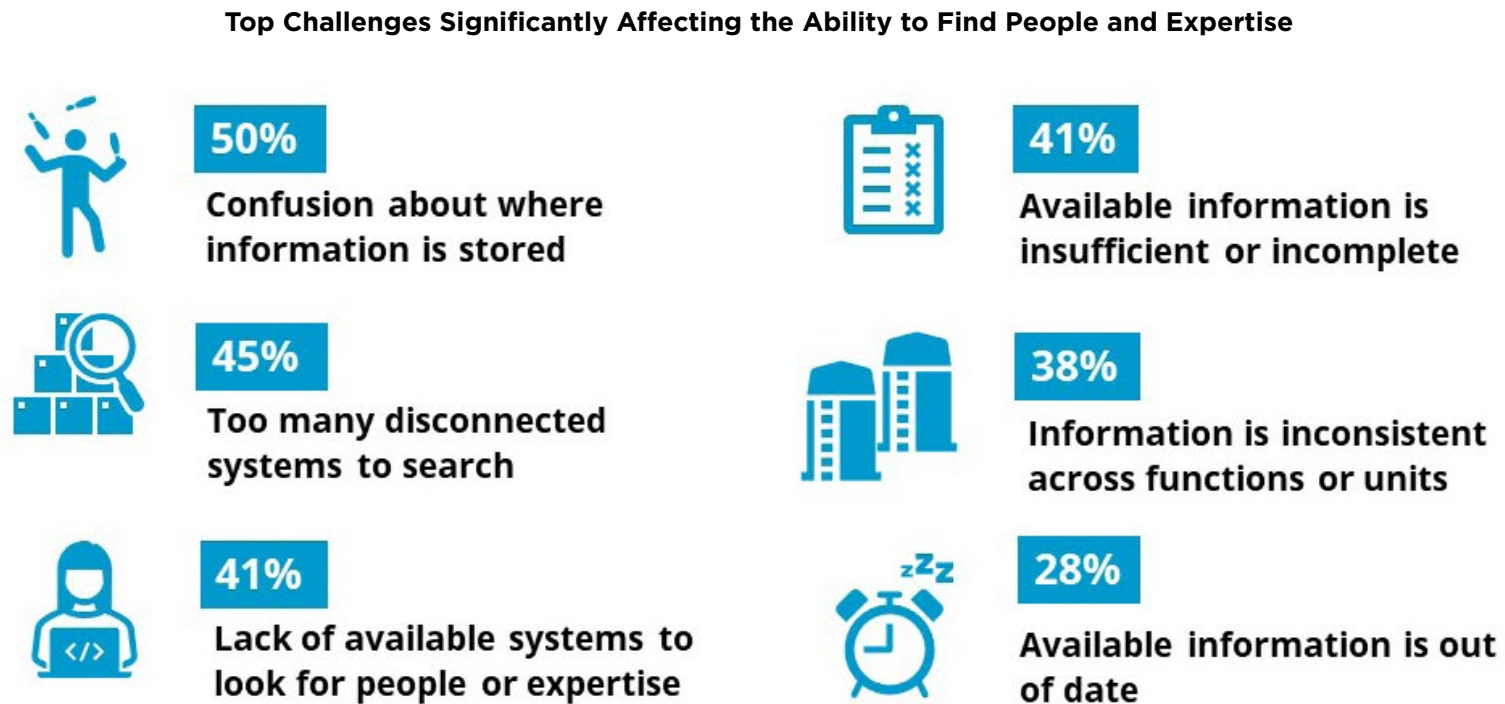


Survey respondents did not hesitate to list off challenges that affect the ability to find information in their organizations (Figure 2), and these challenges point to underlying problems in the information architecture. The biggest issue is getting information out of personal hard drives and other siloed locations so that it is broadly accessible. However, a majority of respondents also report that there is confusion around where information is stored and a proliferation of disconnected systems.



(Figure 2 | N=206)

Disconnected systems and confusion about where resources are stored are also big problems when it comes to finding people and expertise (Figure 3). These two challenges point to a chaotic user experience, driven at least in part by siloed systems.



(Figure 3 | N=211)

For the most part, search algorithms themselves are not to blame.

After all, only 19 percent of respondents say that poor search functionality is a key problem in their organizations. The biggest, most pressing challenges stem from the ways in which repositories are organized and connected. It's also clear that many organizations lack a clear roadmap or cohesive experience for end users.

The inadequacies of existing search solutions are having a real impact on users and the business. For example, nearly two-thirds of survey respondents report that an inability to find information is hurting employee productivity (Figure 4). This makes sense: Every minute someone wastes digging around for information takes time away from doing real work. Other heavily impacted KPIs include employee satisfaction and time-to-competency. The current-state search experience does not “spark joy” for most employees, and for those new to the company, it’s especially difficult. Long-tenured staff might know file paths like the backs of their hands, but newbies certainly don’t—and they are the most likely to need real-time access to information in order to upskill, troubleshoot, and get work done.

And while the issues further down the list are less prevalent, some are quite frightening. For example, 30 percent of those surveyed say that search frustration is trickling down to customers, most likely through sales and service representatives who struggle to find information when responding to customer queries. And more than a quarter say that that findability problems are hitting the bottom line, either through costly mistakes and errors, lost revenue, or missed opportunities for cost deflection.

Employees are wasting a lot of time looking for information, and that’s affecting productivity and cycle times. In some cases, employees don’t find what they need and charge forward without leveraging critical information. In others, they find the wrong version of the right thing, and thus work from outdated or unvalidated information. These scenarios can lead to mistakes that are embarrassing for employees and costly for their companies. Moreover, findability challenges are making it harder than it should be for employees to grow into new roles, reuse available knowledge to accelerate projects and processes, and solve problems.



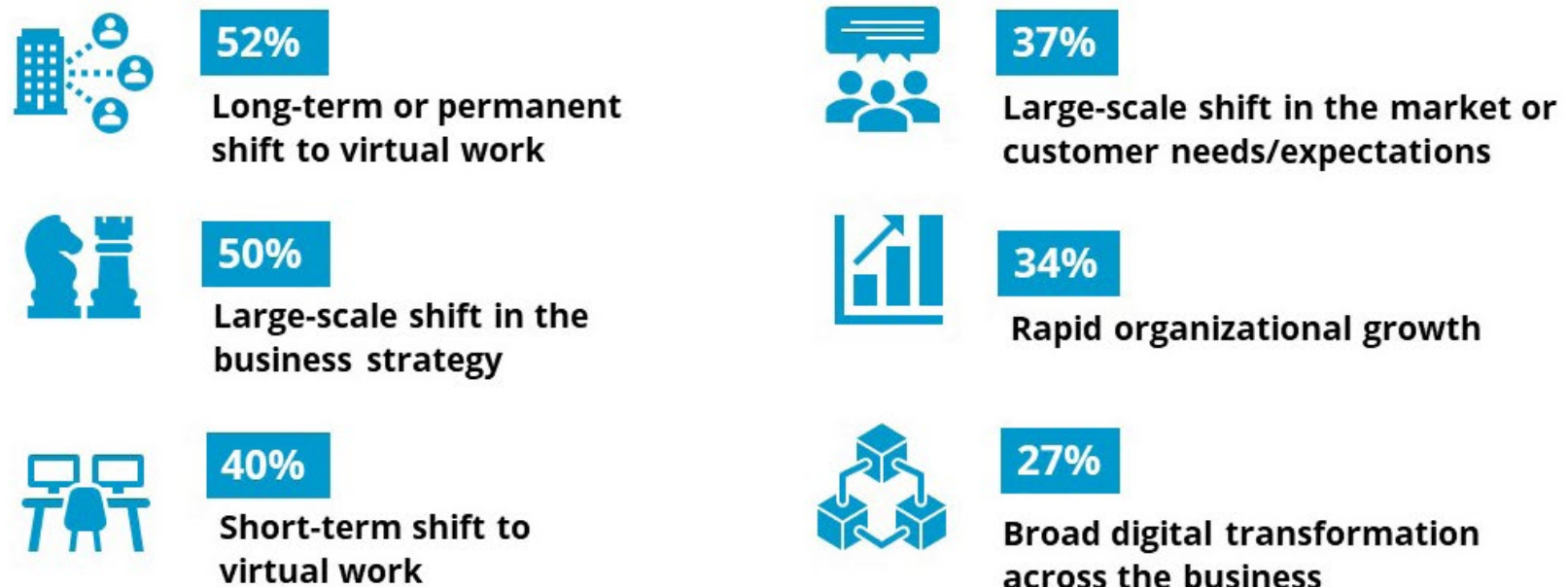
(Figure 4 | N=214)

THE PANDEMIC YEAR AMPLIFIED EXISTING PROBLEMS

The COVID-19 pandemic and its aftermath drew attention to problems with the flow of enterprise information—and in many cases, exacerbated them. In times of crisis and uncertainty, information changes quickly. People need access to the right stuff faster than ever before to address the whack-a-mole of emerging problems and opportunities. At the same time, social distancing compelled employees to rely more on technology to mediate the flow of information. Newly remote employees struggled not only to find key documents, but also to discern the latest official updates from old news and unvalidated ideas and opinions.

These problems sparked a shift in priorities for KM and IT leaders. A range of factors influenced the evolution of knowledge and information strategies over the last year, with the top three being virtual work, business strategy shifts, and changes in market or customer expectations (Figure 5).

Top Factors Influencing KM and Information Management Strategy Over the Past Year



(Figure 5 | N=211)

Many of these trends are not aberrations that will quickly return to the pre-pandemic status quo. This is particularly true of virtual work: more respondents say their priorities were affected by a long-term or permanent shift to virtual work than a short-term one. In other words, organizations must consider these changes as lasting and plan to invest accordingly.

“With a major shift to a fully digital workforce, one leader in Nuclear Energy saw its intelligent search queries double in March of 2020, along with major productivity gains. Search has proven to be a necessity in the increasingly digital workforce and is expected to continue to add value. In a recent survey, employees say they save on average 1 hour per week, which the company equates to over €1.5M in cost savings.”

- Sinequa

.....

The need for advice and answers in uncertain and fast-moving circumstances, combined with the rise of virtual work, shined a spotlight on knowledge and information management—for better and for worse.

.....

Eighty-one percent of respondents say that employees relied more on KM tools and solutions in 2020 than in previous years—and 42 percent said employees relied on them *much* more. But as reliance increased, so did dissatisfaction with current solutions. More than two-thirds report that concerns about the ability to find information inside their organizations increased in 2020.

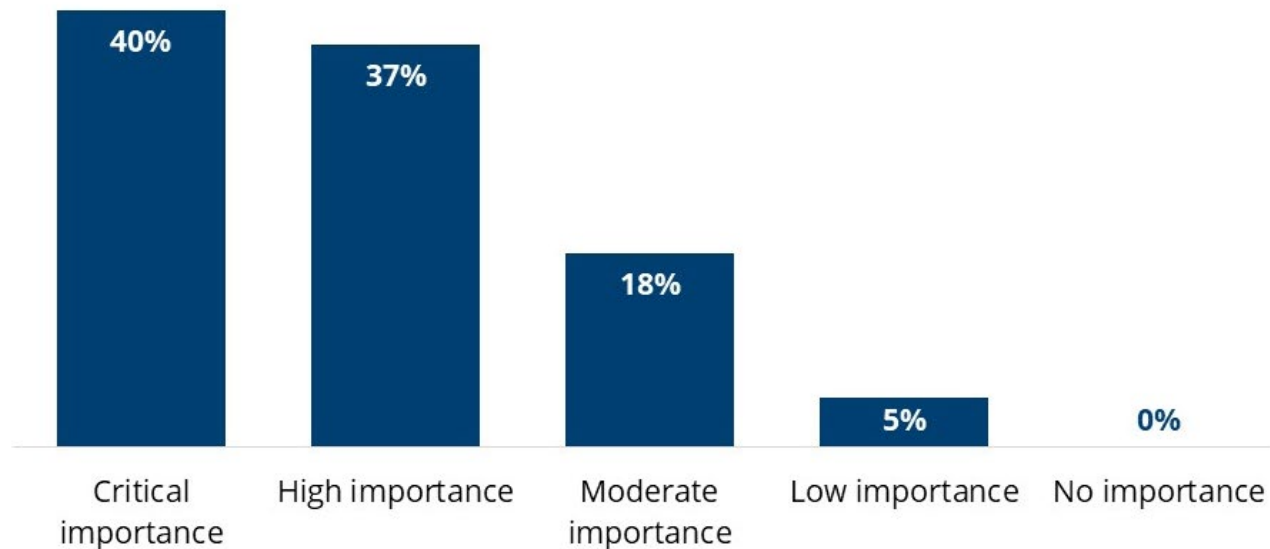
Additionally, findability problems had more of an impact on key business metrics than in previous years. The biggest area of concern is around employee productivity. Fifty-eight percent of respondents say that gaps in their organizations’ KM and information management infrastructure hurt productivity more in 2020 than in previous years, likely because employees needed remote access to the most up-to-date information to be effective. They also couldn’t rely on in-person workarounds, such as asking a nearby colleague or knocking on the door of the expert down the hall, when repositories failed to serve up needed information.

In addition, 47 percent of respondents report that challenges finding information had a greater impact on employee satisfaction in 2020. For many, the digital workplace became the totality of the employee experience. With fewer touchpoints for engagement and no in-person office to supplement it, a poor user experience in the virtual realm is much more likely to make employees feel frustrated and disconnected.

INVESTMENT IS GROWING, BUT STILL LAGS THE NEED

The data shows a significant gap between what IT and KM leaders recognize as important and the solutions they've put in place. The need to radically improve search has been recognized, but not necessarily acted upon—at least, not yet. For example, a vast majority of survey respondents acknowledge that search is a vital tool to connect employees to information: 40 percent say it's critical, and another 37 percent say it's highly important (Figure 6).

How Important Is Search for Finding Information in Your Organization?

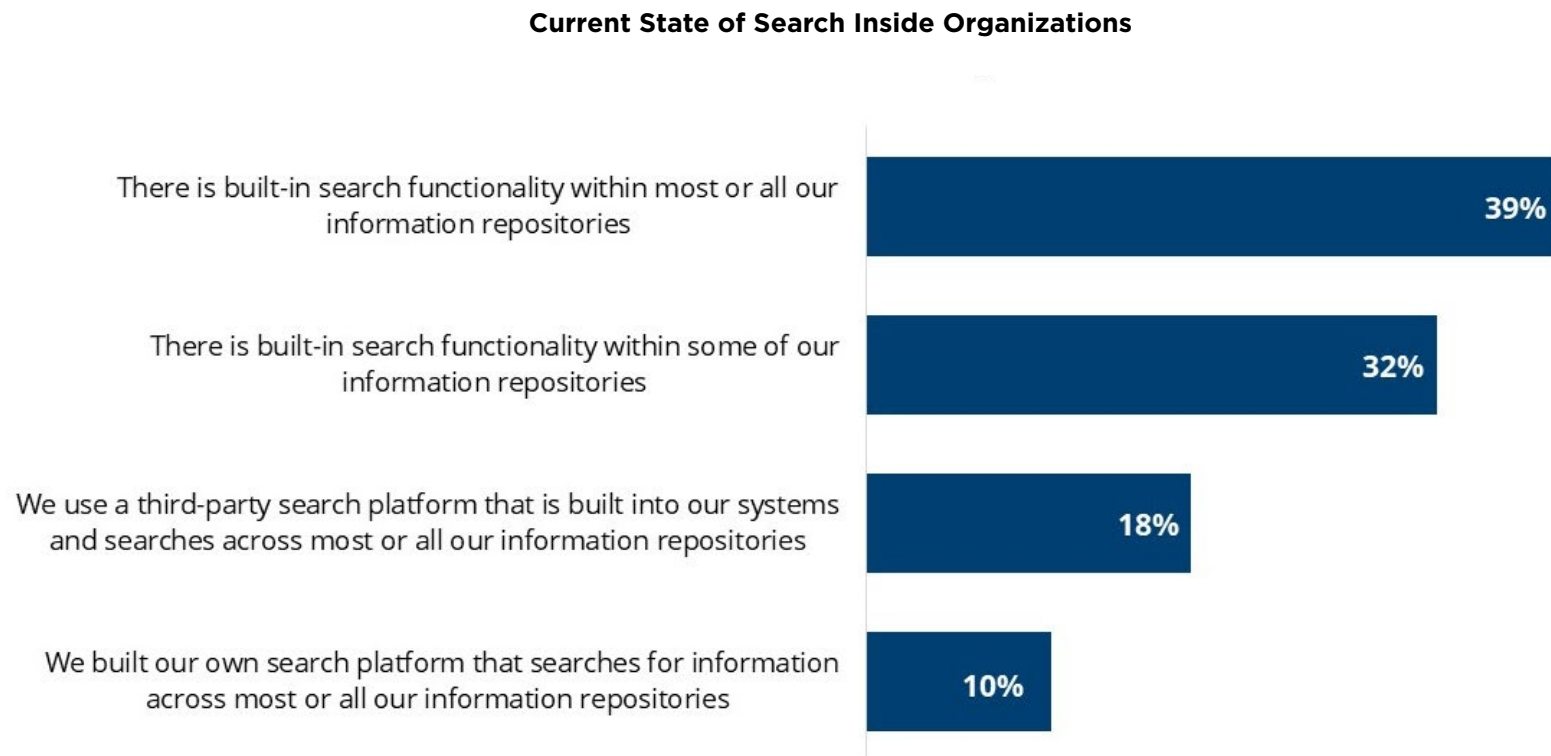


(Figure 6 / N=218)

KM and IT professionals also see the need for better, more cohesive search tools that span repositories.

Among survey respondents, 61 percent list such technology as an important component of a good knowledge or information management program. Yet, only 28 percent have implemented a search platform that searches across most or all enterprise repositories.

The rest continue to rely on built in-search functionality within individual systems and repositories, resulting in a fragmented search experience (Figure 7).



(Figure 7 | N=202)

The median surveyed organization has at least two different places for users to search.

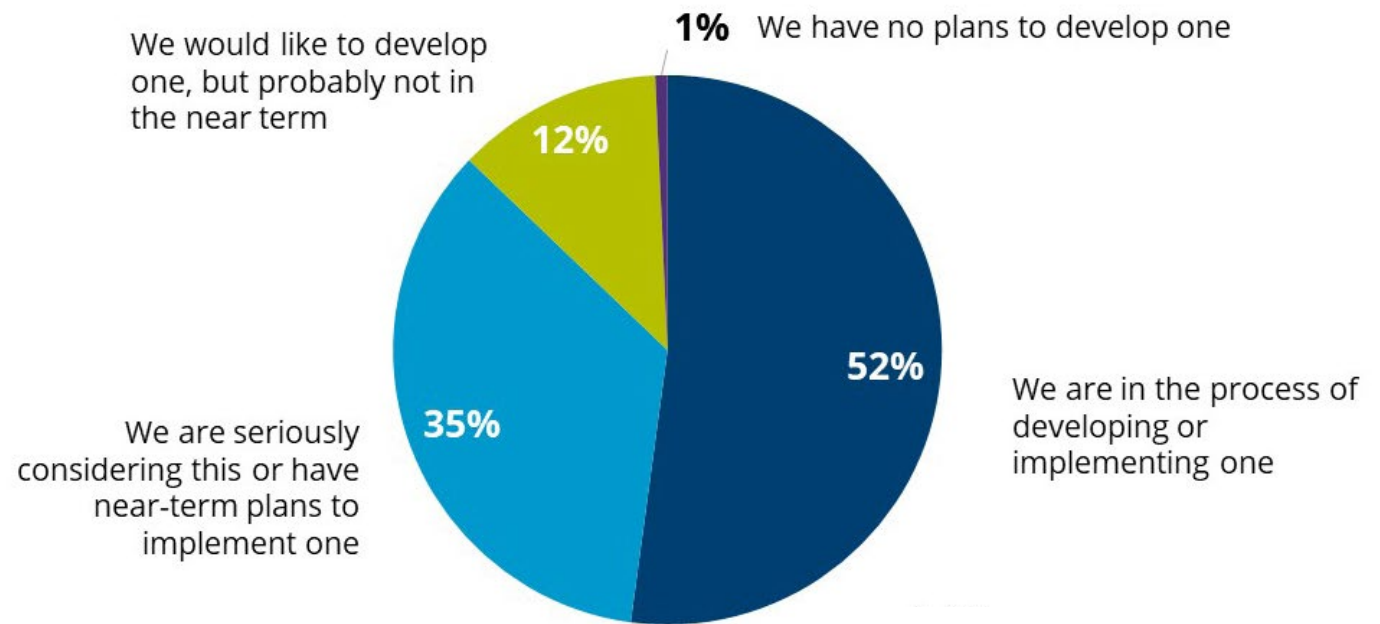


Some report having upwards of 20 different search functions that employees must jump between to find what they need.

If we think back to the top challenges finding information and expertise (figures 2 and 3), it's clear that a one-stop-shop for search is an important part of the solution. Getting information off personal hard drives is a human behavior issue that requires a good change management strategy to tackle. But organizations can address problems like disconnected systems and confusion about where information is stored by implementing an enterprise search tool. With a single search, employees don't need to know exactly where various bits of information are stored, and they don't have to waste time searching repeatedly across multiple platforms.

In their defense, many IT and KM professionals are working on it. Among surveyed organizations that still rely on search built into individual systems and repositories, 52 percent are in the process of developing or implementing a search platform to search across most or all their repositories. Another 35 percent are seriously considering it—and almost none are ignoring the need altogether (Figure 8).

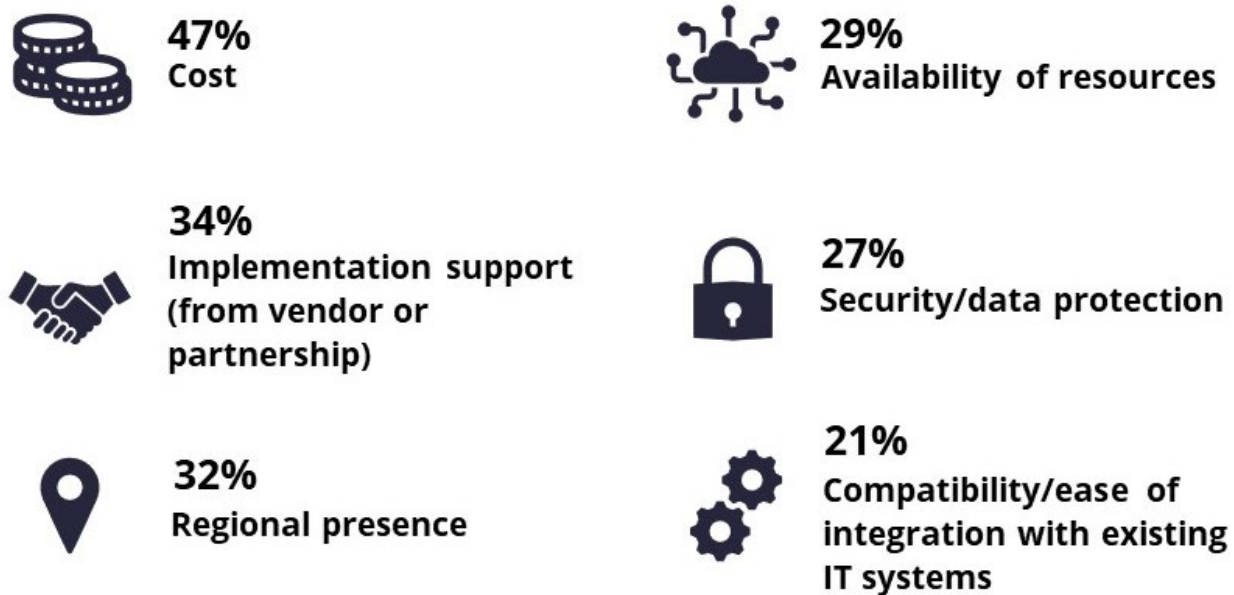
Interest in Enterprise Search Among Organizations Currently Without It



(Figure 8 | N=140)

Regardless of what tools they currently have in place, more than three quarters of survey respondents expect their organizations' investments in search and findability to increase in the next 12 to 18 months—and 41 percent expect those investments to increase significantly. It's also clear that KM and IT leaders see these as long-term investments and aren't just looking for the cheapest option or the quickest fix. Of course, cost is always a factor in vendor selection, but respondents are also shopping based on implementation support, deployment presence (on-prem, cloud, hybrid), security, and integration compatibility (Figure 9).

Top Criteria for Selecting IT Vendors



(Figure 9 / N=216)

41%
**of those surveyed
expect their
organizations
to significantly
increase
investment
in search and
findability in
the next 12 to 18
months.**



The changes wrought by 2020 also underscore the need for nimble vendors and solutions. For example, 38 percent of respondents say that flexibility and customization capabilities became significantly more important selection criteria in the past year, and 30 percent are more focused on support for agile business processes.

In short, organizations are investing a lot more time and money in search than before, and they're specifically looking for flexibility and hands-on support for search solutions. The business environment has changed radically in the past year. In some ways and in some organizations, the change will be permanent—and no one knows when and how it may change again.



Organizations want tools to help employees fish whatever they need out of the vast and ever-shifting sea of enterprise information.



They're looking for cost-effective solutions, but they also need ones that can evolve with business goals and circumstances. And they're hoping they can count on their vendors to help address new user expectations, business needs, and complications as they crop up.

SEARCH IMPROVEMENTS HAVE REAL IMPACT

As they ramp up investments in search and findability, KM and IT leaders are aiming for a range of outcomes. They have two primary focus areas for operational metrics.



SEARCH QUALITY

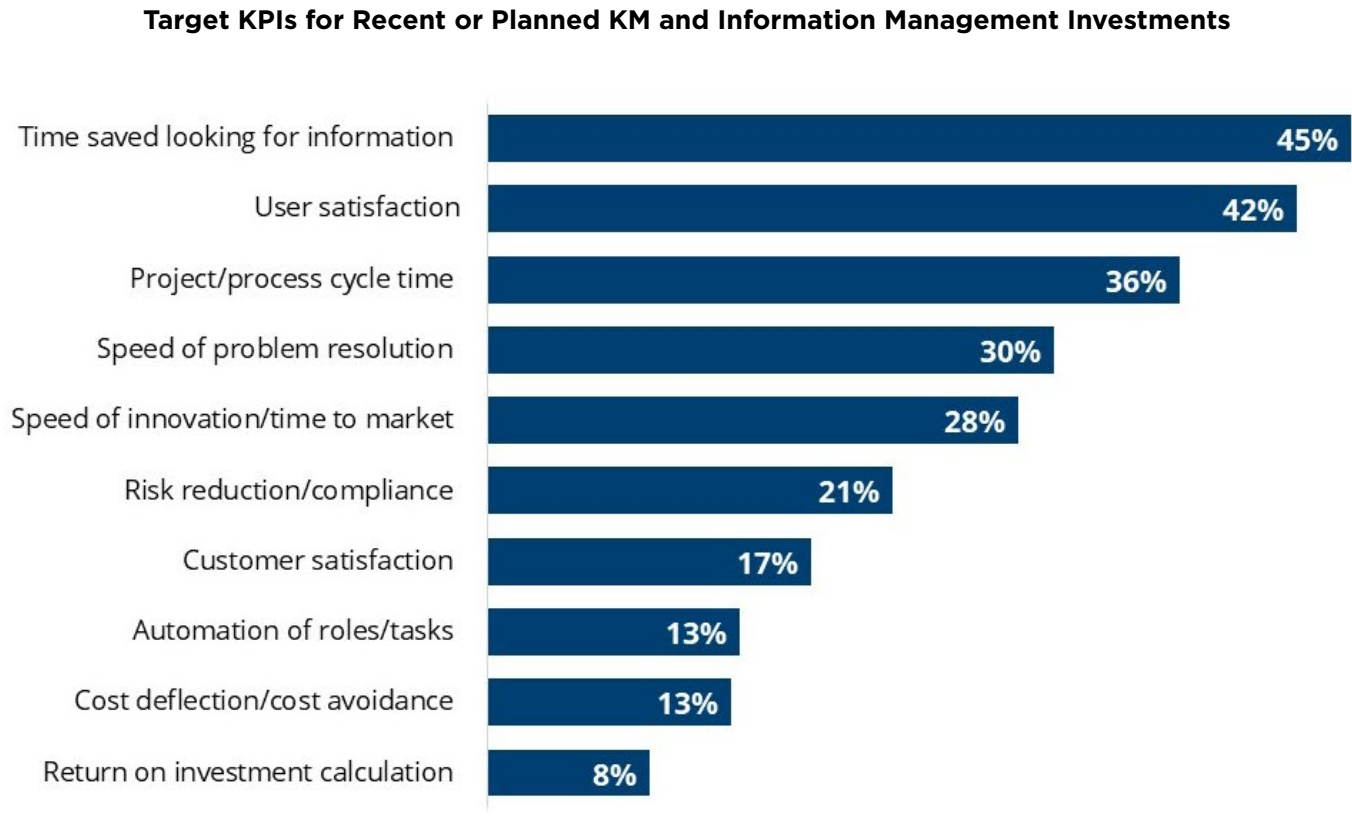
Organizations want their employees to be able to find relevant information quickly and consistently.



TIME SPENT SEARCHING

Organizations hope that people can access relevant items faster, with less time toggling between systems and going down rabbit holes to piece together what they need.

These operational metrics correspond to the business KPIs on which organizations expect to improve. The most common target KPI is time savings for employees, followed by user satisfaction, cycle time, speed of problem resolution, and speed of innovation (Figure 10).

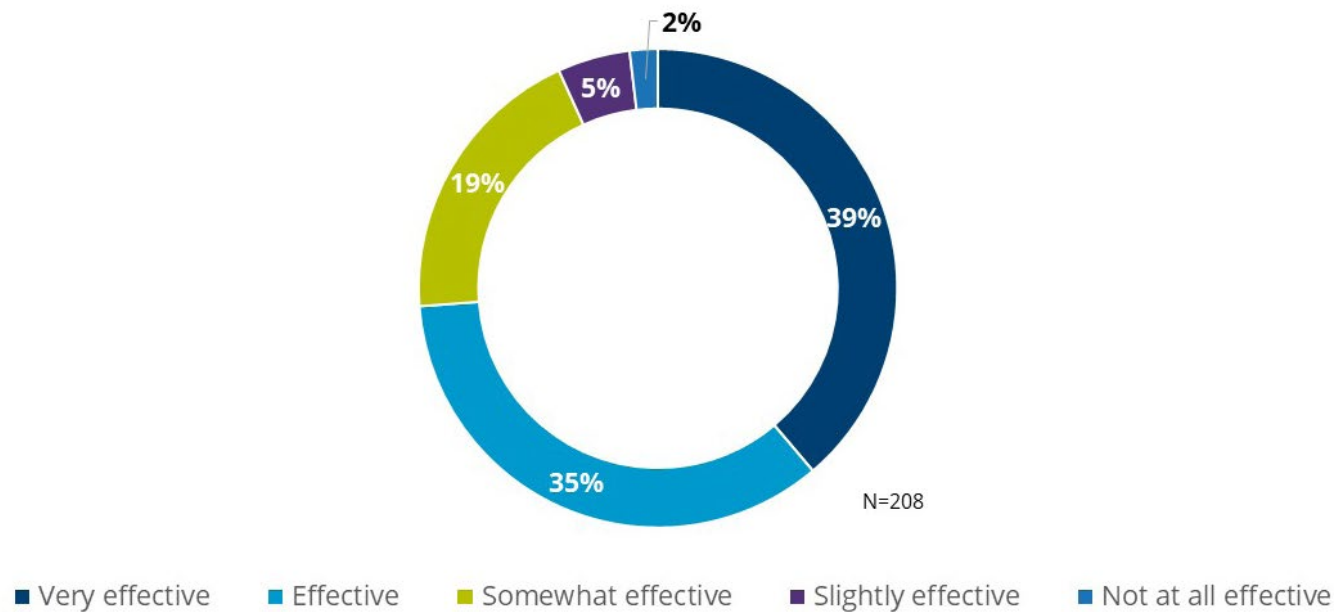


(Figure 10 | N=213)

In short, organizations are aiming to improve employee productivity and satisfaction (the metrics most impacted by findability problems) while also making it faster and easier to complete work, solve problems, and bring new ideas to fruition. Accomplishing all of this may seem like a tall order—and it is.

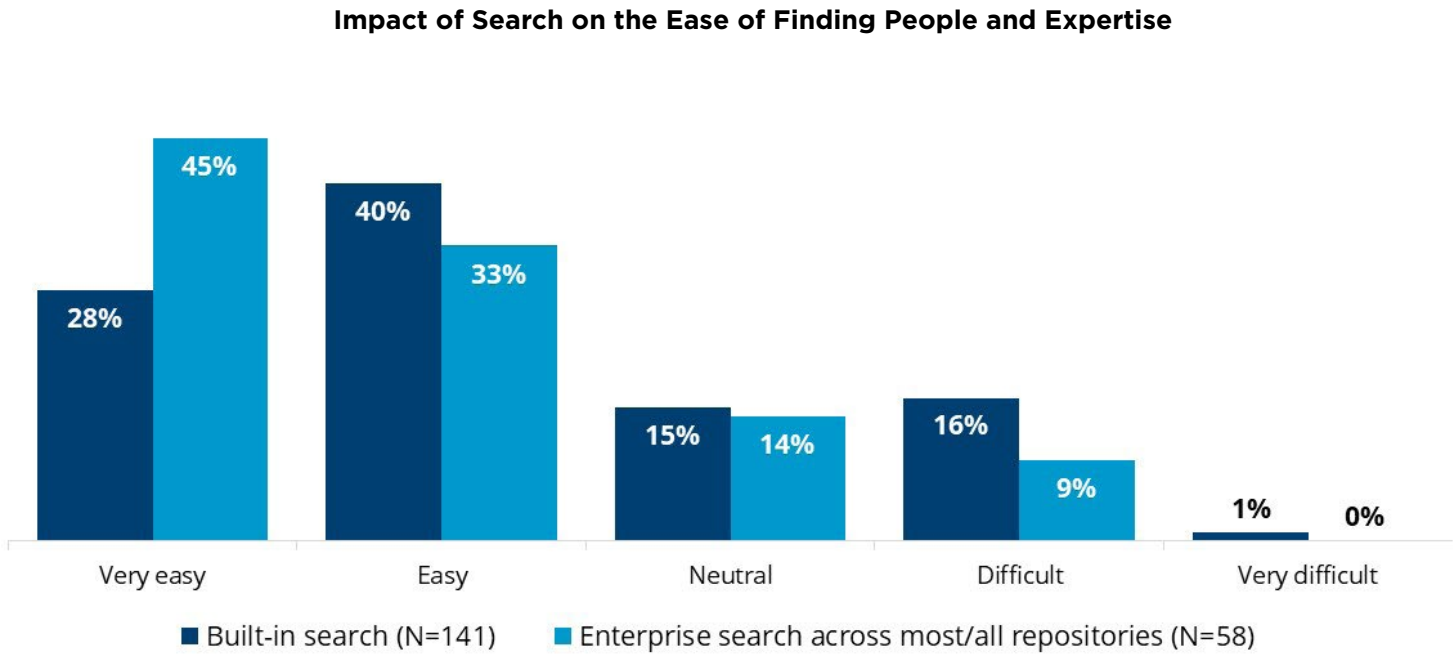
The good news, though, is that organizations that have taken steps to improve findability are seeing positive results. Among those reporting recent investments in search and findability, 80 percent say those investments have been either effective or very effective in solving problems related to surfacing and finding information (Figure 11).

Effectiveness of Recent Search Investments in Solving Findability Problems



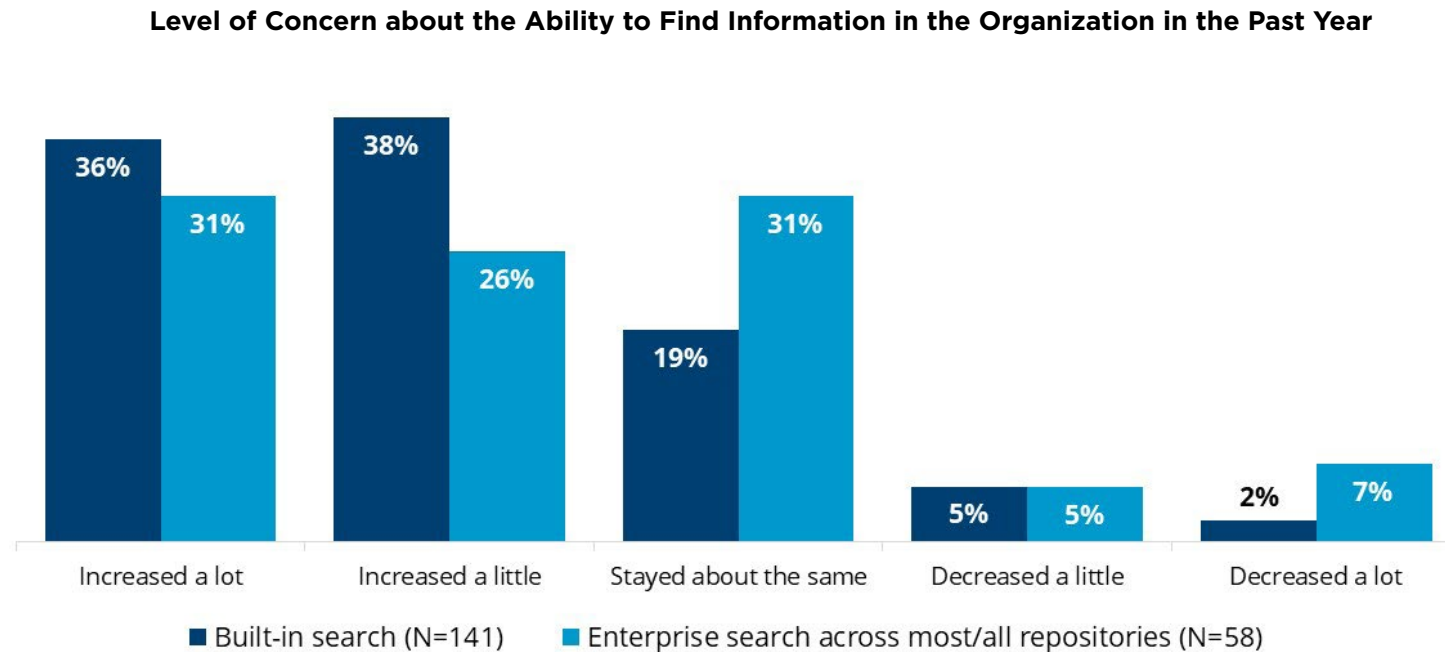
(Figure 11 | N=208)

If we look at organizations that have implemented an enterprise search function that spans repositories, they are more likely to report that users are very satisfied with their ability to find information. Most notably, those with enterprise search in place are significantly more likely to report that it is easy to find people and expertise inside their organizations (Figure 12). This is critical, as enabling access to tacit knowledge and human connections is even more challenging than connecting people to explicit documentation. As a result, employees are equipped with relevant insights that allow them to make better, more strategic decisions.



(Figure 12)

Organizations that have implemented enterprise search are also significantly less likely to report an uptick in concern about the ability to find information inside the organization over the past year (Figure 13). Their investments in search helped them to weather the storm of 2020 intact, and for many, their systems have been robust and agile enough to meet the quickly evolving business and end users needs that the pandemic and its wake have thrown at them.



(Figure 13)

THE TIME TO FIX SEARCH IS NOW

In and beyond work, search is how people get stuff done. Google is the most visited website in the world (by a very wide margin) because search is an increasingly necessary precursor for doing almost anything. When we need answers or advice in our personal lives, we turn to search. People want to count on search at work in the same way, but unfortunately, many can't. Too often, the experience looking for information in the digital workplace is frustrating, confusing, or just plain broken.

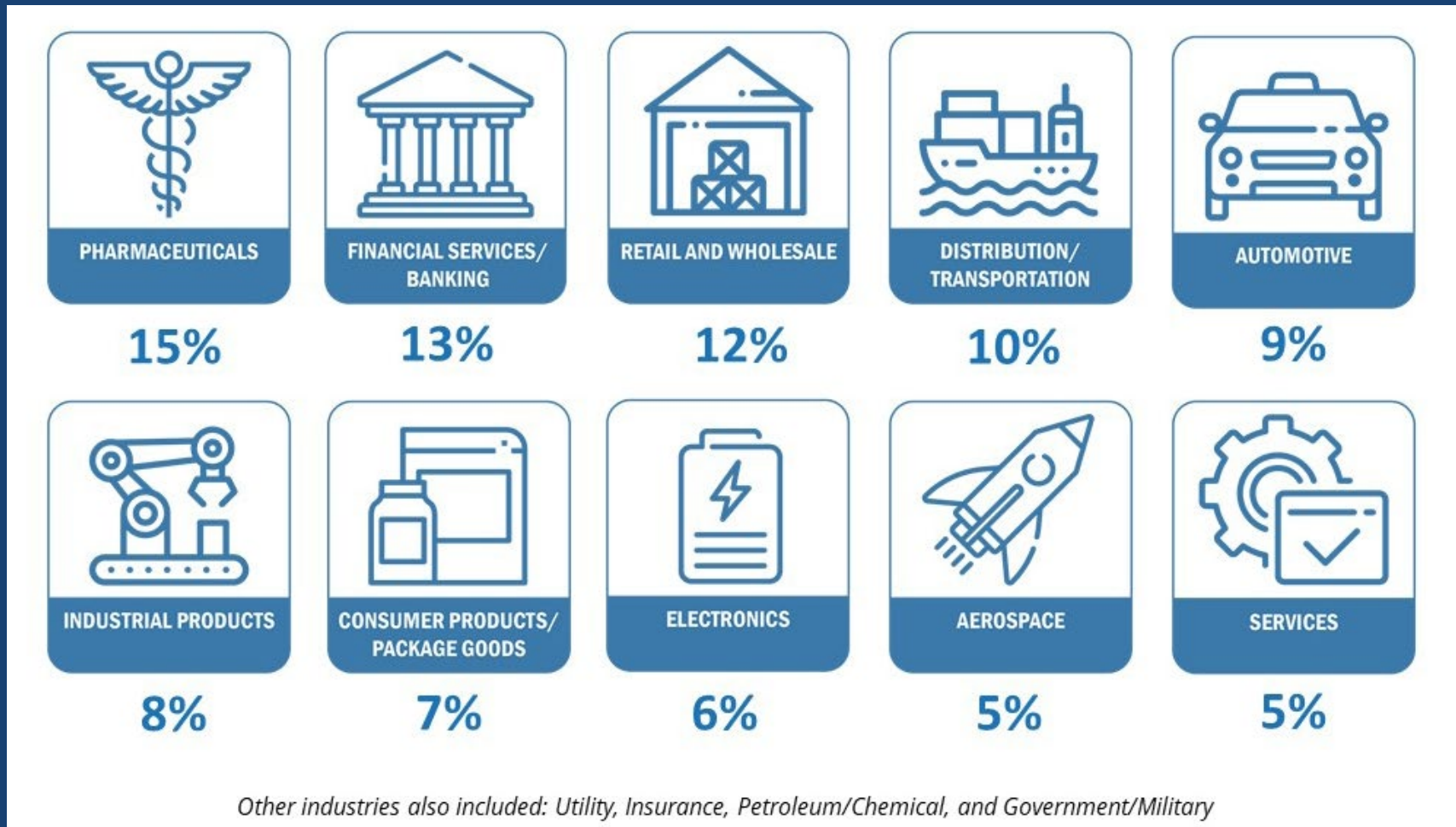
In years past, APQC recommended training employees on how to use filtering and keywords to cope with the oddities and limitations of corporate search tools. Of course, you can still do that—but it was already an uphill battle five years ago, and now it's looking like a lost cause. Employees are exhausted from a year of so much change, being forced to adopt so many new habits, and having to adapt to endlessly evolving technologies and ways of working. It's time to make their lives a little easier, and one of the clearest ways to do that is with an intuitive enterprise search solution.



SURVEY DEMOGRAPHICS

The survey included 218 participants from a range of industries (Figure 14).

Top Participating Industries



(Figure 14)

As Figure 15 shows, most respondents are from organizations with \$1 billion or more in revenue, and most sit at the director level or above.

Survey Demographics

Annual Revenue	
Less than \$500 million	2%
\$500 million to less than \$1 billion	6%
\$1 billion and less than \$5 billion	21%
\$5 billion to less than \$10 billion	19%
\$10 billion to less than \$20 billion	23%
\$20 billion or greater	27%

Region	
United States and Canada	79%
Europe	21%

Full-Time Equivalent (FTE) Employees	
10,000 - 49,999	65%
50,000 - 99,999	19%
100,000 or more	16%

Role	
Head of Business (Chairman, CEO, President, etc.)	1%
VP/Senior Executive	37%
Director/Senior Manager	56%
Manager/Process Owner	2%
Specialist/Analyst	4%

(Figure 15)

ABOUT APQC

APQC helps organizations work smarter, faster, and with greater confidence. It is the world's foremost authority in benchmarking, best practices, process and performance improvement, and knowledge management. APQC's unique structure as a member-based nonprofit makes it a differentiator in the marketplace. APQC partners with more than 500 member organizations worldwide in all industries. With more than 40 years of experience, APQC remains the world's leader in transforming organizations. Visit us at www.apqc.org, and learn how you can make best practices your practices.

ABOUT SINEQUA

Sinequa serves both large and complex organizations with the most complete enterprise search, ever. Customers employ our intelligent search platform to connect all content (both text and data), derive meaning, learn from user interactions, and present information in context. This solves content chaos and informs employees through a single, secure interface. They get the knowledge, expertise, and insights needed to make informed decisions and do more, faster. These organizations accelerate innovation, reduce rework, foster collaboration, ensure compliance, and increase productivity. Become Information-Driven™ with Sinequa. For more information visit Sinequa.com.