Search Optimization Using Metadata and Success Metrics

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Purpose

- Understand what *searchability* means to your company
- Learn about the importance of search optimization
- Learn key search optimization guidelines
- Discuss how to correlate searchability to documentation success
What is Search Optimization?

“How search engines work, what people search for, the actual search terms typed into search engines, and which search engines are preferred by their targeted audience... Optimizing a website may involve editing its content and HTML and associated coding to both increase its relevance to specific keywords and to remove barriers to the indexing activities of search engines.”
Searchability Background

- **2007** – Tech Pubs researched search optimization
  - Importance not understood
  - Recommendations not adhered to

- **2008** – Importance of search optimization emerged
  - Search guidelines defined and communicated to documentation developers
  - Technical Writers and Customer Application Engineers trained on guidelines
  - Testing & closed-loop process not in place

- **2009** – Search Before Submit (SBS) launched
  - Customers encouraged to search web for answers before submitting service requests
  - 14% Service Request (SR) deflection achieved by SBS demonstrating huge potential savings

- **2010** – Taking search optimization to the next level
  - Awareness campaign and training launched by Tech Pubs
  - Implement closed-loop processes for testing and measurement
  - Continue to decrease SRs by improving searchability
Agenda

- Importance of Search Optimization
- Guidelines for Improving Searchability via Metadata updates
- Success Metrics for Search Optimization
  - Search Before Submit
    - Regaining customer confidence with Altera search
  - Proactive and reactive metrics and customer feedback
    - Vitamins and medicine
- Summary
- Resources

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Importance of Search Optimization
SEO, SEM, SERP, the GSA, and SR Reduction

From Wikipedia:

**Search engine marketing (SEM)**, is a form of Internet marketing that seeks to promote websites by increasing their visibility in search engine result pages (SERPs) through the use of **search engine optimization (SEO)**, paid placement, contextual advertising, and paid inclusion.

**External:** SEM best practices are defined by Online Marketing (OLM), with a focus on bringing in new customers
- Website infrastructure (directory structures, html coding, CMS process, etc.) and links
- SEO for campaign terms and key product terms
- Ad program in Google’s search results

**Internal:** We optimize our internal search engine, the **Google Search Appliance (GSA)** to help reduce **Service Requests (SRs)**
- While maintaining search rank of marketing content for customers early in the buying cycle

Most search optimization techniques are the same
Marketing Value of SEO: English, Japanese, and Chinese Websites

Our presence on external search engines is critical

- Only a third of our visitors see our home page
- More than a third of search referrals are for phrases that have no Altera-brand terms

Referrals from search is close to 45% if we include AlteraForum and changes since Q1 ’09. Data excludes self-referrals and uses interpolation techniques. *Values are estimates*
Search Engine Referral Keywords

High value keywords are optimized by OLM
Most keywords natural: Content Developers’ responsibility
Importance of Keywords

“Keyword research is one of the most important, valuable, and high-return activities in the search engine marketing field…also [it is] more about your customers as a whole.”

(The Art of SEO: Mastering Search Engine Optimization by Enge, Spencer, Fishkin, & Stricchiola)
GSA Trend – Position of Clicked Search Results

Forum & Wiki displaces some preferred results
Forum results estimated to be clicked for 7% of searches
New GSA SW with ‘learning’
Search Guidelines Overview
Search Optimizations and Impact

- Choose descriptive and succinct titles and headings – 60%

- Use titles and headings that place product names towards the end of the title or heading – 10-15%

- Use an introductory sentence/paragraph that summarizes the document’s contents (keywords repeated in doc) – 10%

- Use 6-10 keywords or phrases for metadata – 5-20%
Improving your Metadata

It is more than just keywords!
Improving Your Metadata

- Use keywords and phrases as metadata and in your titles
  - Keyword / Keyword phrase – A word or string of two to five words a user would be likely to type into the www.altera.com search box in order to find your document
  - Optimal 10 keywords or phrases
  - Think like the customer. What words would a customer use to find information?

- Use Google AdWords and TagCrowd tools to aid in creating your keywords and phrases
Keyword Planning and Analysis

- Produce a list of keyword phrases that describe your product/services.
- Spend some time coming up with synonyms that your customers might use for products/services.
- Create a taxonomy of all the areas of focus in your industry.
- Broaden your list by thinking of higher-level terms (subsets of your products/services).
- Review your existing site, and extract what appears to be keywords/phrases.
- Review industry associate site for your topic area.
- List all your various brand terms.
- List all your products. (massive number of products use categories and subcategories)
- Think like the customer.
- Use your web analytics tool to see what terms people are using to visit your site.

(The Art of SEO: Mastering Search Engine Optimization by Enge, Spencer, Fishkin, & Stricchiola)
Google AdWords – a Tool to Expand Your Keywords

- Google AdWords is a web application that recommends additional words for your document and your metadata
  - https://adwords.google.com/select/KeywordToolExternal
How to Use Google AdWords

1. In the **Word or phrase** field, enter your keywords
   - Use a return after each key phrase
2. Expand Advanced Options
3. Under Locations and Languages, select **All Countries**
4. Enter security check word
5. Click **Search**
Google AdWords

Find keywords
Based on one or more of the following:

- Word or phrase (one per line)
- Website

- football
- world cup

Include terms
Exclude terms

Categories
- All Categories
- Sports & Fitness
- Show all categories

Match Types
- [ ] Broad
- [ ] Exact
- [ ] Phrase

Related search terms
- [ ] football
- [ ] world cup

Keyword Ideas (800)
- [ ] world cup 2010
- [ ] world cup winners
- [ ] 2010 world cup
- [ ] world cup schedule 2010
- [ ] world cup groups

Global Monthly Searches
- [ ] 4,020,000
- [ ] 201,600
- [ ] 4,080,000
- [ ] 165,600
- [ ] 60,500

Local Monthly Searches
- [ ] 1,000,000
- [ ] 60,500
- [ ] 1,000,000
- [ ] 50,500
- [ ] 60,500

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Results of Google AdWords

- Shows frequencies of the root word
- Provides alternatives for keywords
- Shows industry word is used
TagCrowd – a Tool to Check and Find your Keywords

- TagCrowd is a web application for visualizing word frequencies in any user-supplied text by creating what is popularly known as a tag cloud or text cloud

- Provides visual insight on how the search engine views the text of your document
Results of TagCrowd

- Ignores articles (a, an, the)
- Does not group words
- Shows most frequently used words in document by internal and external search engines regardless of metadata
- Add important search keywords or phrases that do not show up in TagCrowd results to metadata
How to Use TagCrowd

1. Highlight and copy text from your Adobe FrameMaker or PDF file
2. Paste text into the **Paste text to be visualized** box
3. Scroll down the page to set your options:
   a. Minimum frequency: 5
   b. Show frequencies: Yes
4. Add unnecessary words to track in the **Don’t show these words** (Altera, corporation, page, following, figure, table)
5. Click **Visualize**!
   - TagCrowd returns a cloud of words
   - Larger words indicate terms you used more frequently in that chunk of your document’s text
   - Because you selected **Yes** for the **Show frequencies?** section, the number of times a word appeared in your text is displayed beside each term
Adding Metadata Keywords to a Document

- Select your PDF and right-mouse click to access the Properties.
- Select PDF tab.
Search Guidelines Overview – Improving Your Metadata

- Be descriptive and brief for your Description Field of your Document
  - Sentence fragments are ok
  - A Bad Document Description –
    - This chapter discusses the HardCopy IV back-end design flow executed by the Altera HardCopy Design Center when developing your HardCopy IV device
    - This sentence example would be ok as the 1st sentence in your document, but should be shortened if it is going in the metadata
  - An Optimized Document Description –
    - Implementing a design for the HardCopy Design Center
Document topic not clear from displayed title. Customer may overlook best result.
Improved metadata provides specific title in search results.
Adding Document Title Metadata to a Document

Improve search results on older documents via PDF metadata
Document Metadata – Recommended FrameMaker Setting

- **Title** - Place the important, most specific part of the title first (ex. <chapter title>, <handbook title>, <volume#>, <chapter#>)}
Testing the Success of Your Search Optimization
Success Metrics for Search Optimization

- **Search Before Submit**
  - Regaining customer confidence with Altera search
  - Web programming and region support team

- **Proactive and reactive metrics and customer feedback**
  - Vitamins and medicine
  - Tech pubs and region support team
Documentation = Support Deflection

- Altera Search Before Submit: Customers required to view search results before submitting support tickets
- Search result based on support query often return links to documents
- 14% reduction in customer support tickets in 2010
Search Before Submit
Basic Request Information

Step 1 requires few input fields to speed up process.
Search Before Submit

Request Title Search Results

Step 2 SBS “Entire Site” search includes KDB, Forums & Wiki (No corporate content)
SR Status = “Deflected” for 19% of time

- Big number! Further evaluation to be performed
Results

- 13%: 2010 WW01-WW44 deflection rate
- 16%: Expected deflection rate WW47-WW52 2010 given SBS for Field Application Engineers (FAEs) launches WW46 2010
SR Volume by 4 Week Rolling Average

- Forecast a 5% reduction in submitted SRs 2010 to 2009
  - 95%: 2010 to 2009 Submitted WW26-WW49 (SBS live in this timeframe over both years)
- SBS on Transaction Center (TC) launches WW46 and FAE SR deflection occurring
SBS on Transaction Center – Early Success!

**YTD prior SBS on TC (WW1-46)**

- mySupport Deflected: 13%
- Hotline/AE: 12%
- FAE-Web: 33%
- mySupport Handled: 42%

**All SRs**

**SR Deflection targets:**
1) 10% TC deflection
2) 3% increase of overall deflection

**SR Deflection actual*:**
1) 12% TC deflection
2) 4% increase of overall deflection

**3 Weeks post SBS on TC (WW47-49)**

**All SRs**

- mySupport Deflected: 11%
- Hotline/AE: 13%
- FAE-Web: 32%
- FAE-Web Handled: 41%
- mySupport Handled: 49%

**TC SRs**

- FAE-Web Deflected: 12%
- FAE-Web Handled: 88%

**mySupport SRs**

- mySupport Deflected: 24%
- mySupport Handled: 76%

* Based on WW47-49 data
Searchability Compliance Goals – Vitamins

- Ensure documentation compliance with search optimization guidelines
- Target active & technical documentation essential for answering customer questions
- Example goals
  - 80% basic searchability (metadata) compliance of all active documents
  - 80% of key reference documents fully compliant with searchability guidelines
  - Requirement for all new collateral is full compliance
Reactive Searchability Testing – Medicine

- Use customer support data to identify searchability issues in documentation
  - Support ticket log includes links to documentation that answered or didn’t answer customer question
- Determine if searchability compliance, search engine, or customer diligence is culprit
- If searchability compliance; update document metadata & republish
How to Test for Searchability

- Review & add to searchability information in doc plan
  - Apps SME
- Verify doc is written with customer focus
  - Apps SME
- Create Doc Plan
  - Include searchability information in doc plan
    - Tech Writer
- Review Doc Plan
  - Keep searchability & customer perspective in mind
    - Tech Writer / Apps SME
- Create Draft
  - Tech Review
  - Peer Review
  - Stakeholder Review
  - Final Review
  - Publish Doc
  - Search web for doc per criteria in doc plan (QA)
    - Tech Writer
  - Test doc searchability based on SR SBS data (QC)
    - Tech Pubs
- Medicine
  - Incorporate ongoing searchability improvements (ADoQS/SPR)
    - Tech Writer / Apps SME
Summary

- **Search optimization guidelines**
  - Choose descriptive and succinct titles and headings – 60%
  - Use titles and headings that place product names towards the end of the title or heading – 10-15%
  - Use an introductory sentence/paragraph that summarizes the document’s contents (keywords repeated in doc) – 10%
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- **Search metrics**
  - Vitamins and medicine
  - Improving your service request type flow (SBS)

- **Incorporate search optimization in your documentation planning and create metrics**
Resources

- **Guidelines for Web Development**
- **Guidelines for Optimizing Documents for the Web**
- **Books on Search Optimization** —
  - *Ranking #1: 50 Essential SEO Tips To Boost Your Search Engine Results* by James Bewwick
- **Google Guidelines** —
- **Papers on Web Page Writing Styles** —
- **Usability.gov Guidelines** —
- **Keyword/phrases tools**
  - [https://adwords.google.com/select/KeywordToolExternal](https://adwords.google.com/select/KeywordToolExternal)
Thank You