



In-App Search Research Process & Findings



Scope

Remote interviews included eight individual participants across six companies:

Bio-Rad

CoreCivic

Hershey's

KAR Auction Services

Uber

Waste Management



Methods

- In-Depth Interviews
- Customer Artifacts & Documentation
- Secondary research



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What did we find?



Example Insight

SEARCH TERMS

"I often search for cases using a person's full name."

PROBLEM

Throughout an investigation, a case manager typically wishes to find every record where a given individual is named in order to gain a holistic view of that individual over time

SOLUTION

Enable search function to include multiple words or names (ex: "Jane Smith" instead of "Jane" or "Smith")

Search in Employee Scorecard

3 results for "Nick Klein"

[Expand search results to include similar names?](#)

Nick Klein
Associate, Accounting | Houston, TX

Nick Klein
Associate, Audit | Houston, TX

Nick Klein
Manager, Product Design | Dallas, TX

Anita Klein
Director, Audit | Houston, TX
Missing: Nick | Must include: Nick

Marjory Klein
Manager, Accounting | Houston, TX
Missing: Nick | Must include: Nick

Nick Smith
Manager, Marketing | Dallas, TX
Missing: Klein | Must include: Klein

Example Insight

PREEMPTING SEARCH

“Having greater visibility of certain things would preclude my need to search at all.”

PROBLEM

Case managers often want to see what else an individual is involved in but searching for those things manually is cumbersome

SOLUTION

Surface a list of "related items" or "also appears on" items directly within the issue details page for quick reference



Example Insight

SEARCH PURPOSES

"I'm often asked to find things in Convercent for someone else."

PROBLEM

Due to restricted permissions, administrators are often tasked with performing searches for different individuals or business units

SOLUTION

- Enable administrators to grant temporary access to items within Convercent
- Provide a way for administrators to perform searches and save the results to hand off to other teams

The screenshot shows a search interface with a search bar containing 'Bob Smith' and a dropdown menu set to 'All'. Below the search bar is a 'BULK ACTIONS' menu with the following options: 'Add to collection', 'Share/Grant access', 'Grant temporary access', 'Grant partial access', and 'Flag for follow up'. A callout box highlights the 'Share/Grant access' option. Below the callout box is a modal window for sharing access. The modal window has the following content: 'Share what: Entire cases OR select fields to limit access', 'Share with: Shannon Welch x, Simon Hurwitz x, +add', and 'Grant access for: 30 days SHARE'.

Example Insight

PROCESS NORMALIZATION/IMPROVEMENT

“Seeing the outcomes of previous, similar cases helps me normalize our processes.”

PROBLEM

Customers with multiple business locations have identified inconsistencies in sanctions across facilities— this can become a liability for the company

SOLUTION

Provide customers with a quick reference of how similar cases were handled in the past and what sanctions and corrective actions were applied



Thank you!

