



The Ultimate SharePoint Search Optimization Checklist

Use this guide to systematically improve your SharePoint Online search experience.

Phase 1: Foundation & Audit

- **Identify Pain Points:** Interview users from 2-3 different departments (e.g., HR, Legal) to identify their biggest challenges with finding information.
- **Define Key Content:** List the top 5-10 most sought-after types of content (e.g., HR Policies, Project Templates, Brand Assets).
- **Review Existing Metadata:** Audit a key document library. Are documents consistently tagged? Are content types used correctly?
- **Establish a Governance Plan:** Decide who is responsible for metadata quality and search configuration.

Phase 2: Technical Configuration

- **Create Result Sources:** Define at least one custom **result source** for a specific, high-value content set (e.g., "All Contracts").
- **Implement Query Rules:** Set up one promoted result (e.g., for "Vacation Policy") to guide users to the authoritative document.
- **Configure Managed Properties:** Identify 3 critical metadata columns from your audit (e.g., "Department," "Document Status") and ensure they are mapped to refinable managed properties.
- **Build Custom Refiners:** Add the newly configured managed properties as **refiners** on the search results page.
- **Create a Search Vertical:** Build one specialized **search vertical** (e.g., "People" or "Forms") to provide a focused experience.

Phase 3: User Experience & Testing

- **Test with a User Account:** Log in as a non-administrator to test all new configurations. Do they work as expected?
- **Customize Result Types:** If applicable, create a simple result type to visually distinguish a specific type of content (e.g., a "Policy" icon next to policy documents).
- **Gather Feedback:** Ask your initial group of users to test the new setup and provide feedback.
- **Educate Users:** Prepare a short communication or guide explaining the new features (like verticals and refiners).

Phase 4: Maintenance & Iteration



- **Review Search Analytics:** Once a quarter, review the search usage reports in the Microsoft 365 admin center. What are the top queries? What queries have zero results?
- **Tune Relevance:** Use the insights from analytics to create new **query rules** or adjust result sources.
- **Request Re-indexing:** After major metadata changes, request a re-index of the relevant site or library.
- **Iterate:** Schedule a yearly review of the entire search experience to identify new areas for improvement.