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Enterprise Search & Discovery Solutions

Buyer's Workbook

Your structured guide for evaluating today's leading enterprise discovery platforms

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Introduction: Why This Workbook

Most enterprises know the pain: employees spend hours each week searching through contracts, manuals, tickets, and PDFs just to find answers.

That wasted time drains productivity, slows customer support, and increases compliance risk.

The challenge isn't realizing there's a problem - it's deciding which solution to adopt. From IBM Watson Discovery to AWS Kendra, Microsoft Azure Cognitive Search, Google Vertex AI Search, and others, the options can feel overwhelming.



This workbook gives you a structured, vendor-neutral way to:

- Assess your current state and challenges.
- Identify what matters most to your organization.
- Compare leading vendors against critical criteria.
- Clarify your priorities and next steps.

Use it actively: circle answers, jot notes, and share with colleagues.

By the end of completing this workbook, you'll have a framework that can help you when evaluating enterprise discovery solutions.

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Evaluate Your Current State

Before comparing vendors, it's critical to understand how information discovery works in your organization today. These questions aren't about technology - they're about visibility, employee experience, and business impact.

By answering honestly, you'll uncover:

- Where hidden costs and inefficiencies exist.
- How your employees experience the problem day to day.
- The real business risks tied to poor discovery.

Use this section to capture a baseline. The more clearly you see your current state, the better prepared you'll be to evaluate solutions with confidence.

Has your organization measured how much time the average employee spends searching for information each week?

If "No," note this as a visibility gap. Many organizations don't track it - which means the cost of wasted search time is hidden.

◯ Yes ◯ No

Do you hear employees complain they spend too much time digging for information?

Frequent complaints are an early warning sign of broader efficiency issues.

◯ Yes, regularly ◯ Occasionally ◯ Rarely / Never

Notes: _____

When information is hard to find, how do employees typically cope? *(check all that apply)*

◯ Re-creating work that already exists

◯ Escalating issues to managers

◯ Ignoring information gaps and moving ahead without it

◯ Asking colleagues for help (time drain on others)

Which of these consequences have you observed when information is hard to find? *(check all that apply)*

Frequent complaints are an early warning sign of broader efficiency issues.

◯ Slower customer support resolution

◯ Compliance or audit risk

◯ Project delays or rework

◯ Employee frustration / turnover

Notes: _____

Evaluation Criteria Grid

Every vendor will claim to “make information easier to find.” Use this grid to separate claims from capabilities.

Criteria	Why It Matters	Importance (1-5)
○ Data Coverage	Can it handle contracts, PDFs, tickets, logs, and other unstructured content? *Notes on Vendors:*	1 2 3 4 5
○ Deployment Flexibility	Public cloud, private cloud, hybrid, or on-premises. *Notes on Vendors:*	1 2 3 4 5
○ Security & Compliance	Encryption, role-based access, audit trails. *Notes on Vendors:*	1 2 3 4 5
○ Integrations & Connectors	SharePoint, Salesforce, ServiceNow, Slack, Box, etc. *Notes on Vendors:*	1 2 3 4 5
○ Relevance & Training	Tuning results, NLP accuracy, feedback loops. *Notes on Vendors:*	1 2 3 4 5
○ User Experience	Search interface, chatbot integration, adoption ease. *Notes on Vendors:*	1 2 3 4 5
○ Scalability & Performance	Millions of documents, concurrent queries, low latency. *Notes on Vendors:*	1 2 3 4 5
○ ROI & Adoption	Cost to implement, time-to-value, total cost of ownership. *Notes on Vendors:*	1 2 3 4 5

Reflection Prompt: Check your top three “must-haves.” These will anchor your vendor evaluation.

Vendor Snapshot

Vendor	Strengths	Considerations	Best Fit
○ IBM Watson Discovery	• Strong NLP for unstructured docs (contracts, PDFs, tickets, manuals) • Hybrid deployment options • Enterprise-grade security & compliance • Integration with watsonx.ai for generative answers	• May require tuning services • More robust than some mid-market orgs need	Finance, legal, healthcare, retail, regulated industries
○ AWS Kendra	• Seamless AWS integration • Good accuracy for FAQs & knowledge bases	• Limited on-prem options • Less flexible outside AWS stack	AWS-centric enterprises
○ Azure Cognitive Search	• Deep ties to Microsoft 365, Teams, SharePoint • Strong developer ecosystem	• Best in MS-first environments • May need custom work for other data	Microsoft-centric enterprises
○ Google Vertex AI Search	• Cutting-edge generative AI + search • Strong semantic understanding	• Fewer enterprise connectors • Limited hybrid deployment	Cloud-native, tech-forward orgs
○ Sinequa / Coveo / Lucidworks	• Enterprise-grade insight engines • Customizable at scale	• Complex deployments • Longer time-to-value	Knowledge-heavy industries (research, engineering, large-scale support)

Reflection Prompt: Check your top three “must-haves.” These will anchor your vendor evaluation.

Next Steps

You've now:

- Identified your visibility gaps
- Prioritized evaluation criteria
- Compared leading vendors side by side

What comes next?

1. Review your workbook with your team.
2. Align on top three "must-haves."
3. Decide which vendors merit deeper exploration.
4. Optional: Schedule a no-cost, no obligation 30-minute consult with CodeTru to review your findings.

Bring your completed workbook. We'll walk through your priorities together and share lessons learned from organizations that have implemented Watson Discovery and similar platforms.

See How AI Discovery Delivers Results.

Codetru helps teams find answers faster and make smarter, data-driven decisions.



Book a brief Discovery Session

Learn what's working for organizations like yours.

Book My Discovery Session