

B2B Search Checklist

A checklist for the three jobs B2B search must perform

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The 3 functions B2B search must fulfill

Most B2B teams discover their search problem in implementation, not in the RFP. This checklist is built to surface those problems earlier — by auditing your platform and your catalog data against what B2B buyers actually do.

For each item, check the box only if the capability works today, in production, without a workaround. "We could configure that" is not a check. "Our partner handles that" is not a check.

Job 1: Confirm

"I know exactly what I need. Take me right there."

Job 1 tests whether your platform handles foundational findability — the kind every buyer expects regardless of industry. The data discipline behind it is product identifier hygiene: clean SKUs, normalized part numbers, predictable handling of misspellings and variants.

What your platform must do

- ☐ Type-ahead search with product suggestions
- ☐ Misspelling correction on common search terms
- ☐ Partial-term and wildcard search
- ☐ Search by product description
- ☐ Search by product category
- ☐ Faceted navigation with multiple filter options
- ☐ Filter by manufacturer
- ☐ Filter by price range
- ☐ Filter by availability
- ☐ Sort by relevance, price (high/low), newness, popularity
- ☐ Refine results by multiple attributes simultaneously
- ☐ Guided navigation with relevant filters per category

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Job 1: Confirm (Cont'd)

What your data must support

- ☐ SKUs are consistent across systems and sources
- ☐ Product titles are normalized and free of legacy formatting
- ☐ Indexed fields cover the names buyers actually use
- ☐ Product descriptions contain the language buyers search with
- ☐ Category structure reflects how buyers think, not how purchasing organized the warehouse
- ☐ Filterable attributes are populated for every SKU, not just hero products
- ☐ Manufacturer field is normalized (no "Acme Inc" vs "ACME Inc." vs "Acme")
- ☐ Price data is current and indexed for filtering
- ☐ Availability data is real-time or near-real-time at the search layer
- ☐ Each sort field has clean, populated data behind it
- ☐ Attributes are structured consistently across catalog segments
- ☐ Category-specific filter logic is maintained as catalog evolves

Job 2: Connect

"I know what I need. Now how do I find it?"

Job 2 is where B2B genuinely differs from B2C. The buyer's specification doesn't match your catalog's vocabulary, and your search has to do translation work. The data discipline behind it is a multi-vocabulary catalog: cross-references between your SKUs and the identifiers buyers actually use.

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Job 2: Connect

What your platform must do

- ☐ Search by manufacturer part number
- ☐ Search by alternate or legacy part numbers
- ☐ Search by customer-specific part numbers (per account)
- ☐ Search by competitor part numbers (return your equivalent)
- ☐ Search by technical specifications (e.g. "1/4 inch brass NPT")
- ☐ Filter by technical specification attributes
- ☐ Filter by category-specific attributes
- ☐ Filter by subscription or eligibility
- ☐ Show featured results for high-relevance matches
- ☐ Return content results alongside product results
- ☐ Personalize results based on purchase history
- ☐ Save search criteria for reuse
- ☐ Show recent searches for quick access
- ☐ Save frequent product filters for future use
- ☐ Weight search results by relevance signals beyond keyword frequency

What your data must support

- ☐ Manufacturer part numbers maintained on every applicable SKU
- ☐ Cross-reference table of legacy IDs to current SKUs
- ☐ Customer part numbers stored against contracts and surfaced to indexed search
- ☐ Competitor cross-reference data maintained and current
- ☐ Technical attributes structured and populated, not buried in description text
- ☐ Spec attributes consistent across catalog segments and units of measure
- ☐ Per-category attribute schemas defined and enforced
- ☐ Eligibility data tied to account context, not just product flags

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Job 3: Complete

"I know the problem. How can you help me solve it?"

Job 3 is where the platform conversation collides with the data conversation. The buyer specified one thing; their actual need is bigger. Surfacing accessories, substitutes, replacements, and compliant equivalents requires a catalog with relationships — not just records.

What your platform must do

- ☐ Boost or bury products within search results
- ☐ Boost-bury based on sales volume
- ☐ Boost-bury based on units sold
- ☐ Configure boost-bury by relevance
- ☐ Synonyms for industry jargon and customer terminology
- ☐ Redirects from specific search terms to landing pages
- ☐ A/B testing of category and search result presentation
- ☐ Search term analytics dashboard
- ☐ Search term effectiveness reporting (zero-result terms, click-through, conversion)
- ☐ Search revenue and utilization reporting
- ☐ Surface accessories required for installed products
- ☐ Surface substitutes when a product is out of stock
- ☐ Surface current replacement when a product is discontinued
- ☐ Surface compliant equivalents where regulation requires
- ☐ Surface kits or assemblies the product belongs to

What your data must support

- ☐ Merchandising rules definable by business users without a deployment
- ☐ Sales velocity data available to the search index
- ☐ Unit-level sales data tied to product records
- ☐ Custom relevance scoring model maintainable by your team
- ☐ Synonym list maintained as catalog and customer base evolve
- ☐ Redirect logic owned by merchandising, not engineering
- ☐ Substitution logic and relationships maintained per SKU

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What Gaps Reveal

Gaps in Confirm point to a platform-level issue. Foundational findability is mostly a solved problem in modern B2B platforms. If basic search isn't working, either your platform isn't doing what it should or your product data is dirty enough that even good search can't surface results cleanly. No amount of merchandising tooling closes a foundational findability gap.

Gaps in Connect point to a catalog architecture issue. Customer-specific part numbers, technical attribute structure, contract-aware results, and content blending are catalog problems before they're search problems. This is the most common gap in B2B search and the one most underestimated in platform RFPs.

Gaps in Complete point to a data discipline issue. The platforms that handle Complete well are not always the platforms that deliver it well — many route this work to third-party search vendors. Buying personalization software without disciplined catalog data is paying for capability you can't operate.

The pattern across the three jobs matters more than any single gap. Gaps in Confirm and Connect together suggest a B2B awareness problem. Gaps in Connect and Complete together suggest a catalog data problem. Gaps in all three suggest the platform may not have been built for B2B from the ground up — which is more common than most B2B teams admit.

How Can We Help?

Whether it's helping with your digital roadmap, product data or an RFP for your next B2B platform, we can help.

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Lost in digital? We're your GPS.

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