

B2B Search Internal Readiness Checklist

Use this checklist to assess your team's readiness
for a new Search platform implementation



Instructions

Use this assessment to determine how ready you are to implement a new Search Engine

Data Foundation

- Product data is complete, consistent, and attribute-rich

Each SKU should have the attributes customers use to filter and compare — specs, dimensions, compatibility, UOM, etc. Gaps here directly degrade search relevance and faceted navigation.

- Product naming conventions are standardized across your catalog

Inconsistent naming (e.g., 'hydraulic fitting 3/8' vs. '3/8 NPT adapter') creates false zero-result searches. Establish and enforce naming standards before indexing.

- Synonym and alternate-terminology libraries are defined

B2B buyers use industry shorthand, legacy part numbers, and trade names. Your synonym library bridges the gap between how customers search and how products are named.



Data Foundation (continued)

- Pricing

data is accurate and customer-specific where applicable

Contract pricing must be correctly associated to customer accounts. Displaying wrong pricing — even briefly — erodes trust and creates service calls.

- Availability and inventory data is real-time or near-real-time

Stale stock data leads customers to order unavailable items. Define acceptable latency thresholds and ensure your integration architecture can meet them.

- A documented data governance process exists for ongoing catalog maintenance

Data quality isn't a one-time cleanup — it degrades continuously as products are added, modified, and discontinued. Ownership, workflows, and accountability matter.

Catalog & Entitlement Structure

- Customer-specific or segment-specific catalogs are clearly defined

Know exactly which customers see which items. Entitlement complexity is one of the most common causes of B2B search implementation failure.

- Entitlement logic is tested to prevent out-of-scope items from surfacing

A buyer should never see — let alone be able to add to cart — an item they're not contracted for. Test edge cases at the catalog, category, and item level.

- Browse and search experiences enforce the same entitlement rules

Many teams test search entitlements but miss browse navigation. Both pathways must apply identical access controls.

- Processes exist to update entitlements as customer contracts change

New contracts, renewals, and account changes must trigger entitlement updates on a defined SLA. Manual processes here are high-risk.

Search Ownership & Operations

- A named individual owns search performance and outcomes

Without a designated owner, search degrades silently. This person reviews reports, manages configurations, runs tests, and prioritizes improvements continuously.

- A regular cadence exists for reviewing search performance reports

At minimum: weekly review of top zero-result queries and high-search/low-purchase terms. Monthly review of overall relevance trends.

- Synonym management is an active, ongoing practice

New products, terminology shifts, and customer feedback should continuously inform your synonym library. This is not set-and-forget.

- Search merchandising is actively managed — not left on default settings

Boosting, burying, pinning, and promoting are strategic levers. If no one is pulling them, your search results reflect platform defaults rather than business priorities.
catalog corrections.

Search Ownership and Operations (continued)

- A process exists for acting on zero-result and low-conversion search data

Data without action is just noise. Define how insights flow from reporting into content fixes, synonym additions, or catalog corrections.

Search Merchandising Readiness

- Promotional and featured items are defined and ready to surface in search

Know which brands, items, or categories you want elevated in results before you configure merchandising rules. Strategy should drive configuration, not the reverse.

- Brand boosting or suppression rules are documented and prioritized

Preferred brands, private label, and high-margin items should be configured to surface appropriately. Define the hierarchy before implementation.

Search Merchandising Readiness (continued)

- Cross-sell and upsell logic is defined at the category or item level

Understand where you want related-item suggestions and what rules should drive them — complementary items, frequently bought together, or margin-based suggestions.

- Seasonal or campaign-based merchandising can be scheduled in advance

The ability to pre-stage and schedule search merchandising changes reduces operational burden and prevents last-minute manual intervention.



About

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B2B Squared guides B2B companies through the chaos of digital evolution with the precision of turn-by-turn navigation. We pinpoint where you are (digital maturity assessments), map the smartest route (strategy workshops), find the right technology pit stops (Platform Genius selection tool), optimize your journey (Flywheel B2B marketing automation and SKU Factory for product data), and help navigate the roadblocks (The Digital Roadmap newsletter).

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