

7 Ways to Get More From Your SharePoint Deployment

Intended Audience

This white paper is intended for CIOs, CKOs, Line of Business Managers, IT Managers or SharePoint Administrators responsible for ensuring their organization is achieving maximum benefit from its investment in Microsoft Office SharePoint.



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Introduction

The implementation of the technology of SharePoint signals the start of the race. Beyond the starting blocks is a set of twists and turns over the course of the race as you speed towards the finishing tape. How you handle the twists and turns determine whether you win the race or don't. As with most races, there's a supporting cast gunning for you to win, and a group of sponsors who have their reputation on the line.

Winning the race with SharePoint involves shifting a significant degree of focus and attention onto what happens after the technology is implemented.

What are the business problems that the capabilities of SharePoint are harnessed to solve?

How do you get employees to change their current ways of working and embrace SharePoint?

How do you make it easy for people to work with SharePoint, streamlining their work each day rather than adding unnecessary complexity?

In this white paper, we talk about what happens after all of the geek stuff is done and the race begins. Our intent is to lay out some very specific and very doable activities that you can follow in the current difficult economic environment that will propel your SharePoint deployment beyond mere great technology to outstanding business results.

Assumptions

Our main assumption is that you already have SharePoint installed at your firm—be that Windows SharePoint Services v3 (WSS) or the full Microsoft Office SharePoint Server 2007 (MOSS). In other words, you have the technology in place to support business activity, but now you are wondering how to do that. What does it mean to "support the business", and what are the typical activities that you should be doing to make that work? This is the focus of our white paper.

A final comment before we kick off. To say the world economy is "fragile" at the moment is a rather large understatement, so what we propose in this white paper is a set of ideas and next actions that you can embark on immediately without a whole lot of operational budget requirements, nor capital budget expenditures. We want you to be able to hit the office tomorrow and start implementing the ideas in this white paper today.

Framework for Productivity with SharePoint

There's a lot that we could say about improving business productivity with SharePoint, and that could (and maybe should) be a white paper or book in its own right. But for the purposes of this white paper, what we'll say is this: one way to get a productivity jump is to eliminate the low-value and time-wasting activities that your information workers find themselves engaged on during the day. For example:

- Dealing with document hell, where Sally has sent out a document for review to 10 people, everyone has commented using Track Changes, and now Sally has 10 different positions to reconcile.
- Handling unclear commitments, where Bruce, Joe and Andrea are all working on the same task from last week's meeting, because each thought they were tasked to do it. But actually, only Andrea was, so Bruce and Joe are wasting time they should be investing in other areas.
- Eliminating the uneven distribution of information across a project team, division or the entire organization, whereby one manager or team thinks that "Strategy Kappa" is driving activity in 1Q2009, but actually senior management has moved on to Strategy Lambda.

There are many others ... but in all cases, if SharePoint is used well and put to the right purposes, all of these issues can be eliminated.

There is a second way in which SharePoint can dramatically assist with productivity gains, but first let's address where it won't. If you are looking to improve business performance through IT, and you take the work process that has been supported by a legacy IT system and introduce a new IT system but don't change the process, you won't get any performance benefit. You might get an IT benefit ... lower storage costs or less network traffic ... but that's fairly thin ice. Your Board of Directors isn't going to sign off on something like that. What you actually need to do is to help your business users re-conceptualize how work processes could be done based on new capabilities in new technologies like SharePoint. And once work process has been re-conceptualized, then you need to help them shift from where they are today with the old system to where they want to be with the new one.

Let's Talk About SharePoint

SharePoint has taken the world by storm. It has re-defined most enterprise collaboration discussions, and has forced major changes in how document management and records management vendors talk about their offerings. You could say that the vendor community either has a strategy to integrate with SharePoint, or fight against it. And for enterprises, it has been elevated to a place of centrality in decision making about information management, intranets and collaboration.

Why is this? For one, it's from Microsoft, and so the stability of the vendor is guaranteed. They aren't going anywhere, so a SharePoint play is a long-term bet. For two, Microsoft Office rules the desktop in organizations across the world, and being that products are from Microsoft, there is tight integration between Office on the desktop and SharePoint in the back room. And three, SharePoint is a broad-based platform to support many different information worker-related processes. If you buy into the full MOSS edition, you have capabilities available to support collaboration, search, portals, content management, business processes and forms, and business intelligence, not to mention the application development capabilities of SharePoint so that organizations can build custom-tailored solutions to their own requirements. And to top it all off, there is a growing base of knowledgeable business partners available to support organizations in realizing the capabilities that SharePoint offers.

While this sounds nice, the market figures are there to back up what Microsoft is doing with SharePoint. In March 2008 (almost a year ago), Microsoft said that it had sold 100 million licenses to use SharePoint, and that its annual revenue from license sales was over US\$1 billion. We'll just point out, however, that 100 million "sold licenses" doesn't equate to "100 million active users", but whatever the real figure of active users is, it's a big number.

The Challenges With Platform Technologies

Platform technologies that offer a broad-brushed set of capabilities—such as SharePoint—across a range of information management disciplines can be summed up in one phrase: "they offer tremendous flexibility". Unfortunately, that is both a huge opportunity and a huge

drawback. It's a huge opportunity because it means that any and every firm can make SharePoint whatever they want it to be. And it's a huge drawback because if they do it wrong, a huge set of unintended consequences can occur, and pretty soon you find that it's not a tiger you have by the tail, but a fire-breathing dragon.

Problems like:

- Chaotic viral adoption, where people are recklessly creating short-term SharePoint sites to deal with a perceived business challenge, but then the site is abandoned and the corporate information they contain is hidden from authorized systems.
- Too much experimentation, where business users start configuring a whole set of different sites to do similar things but in the aggregate, in very different ways. One firm claimed to have 325 projects on the go using SharePoint, and each project site was based on a different design. So someone involved in 4 different projects—not an uncommon number today—had to remember 4 different ways of tracking tasks, for example.
- Unauthorized adoption by business teams, outside of the purview of the IT department. One US firm had its corporate deployment of SharePoint all ready to go, but before they pushed “go”, did an audit and found 15,000 undocumented sites that they didn't know about. Business managers were buying SharePoint on their credit cards and installing Windows Server 2003 boxes under their desks, and IT had no knowledge that business information was being stored and shared through commodity systems with no backup and security procedures in place.
- Top managers hearing that SharePoint is the “way of the future” and telling IT to “have at it”, but with no clear picture beyond the words of what that actually means and the requisite changes involved in getting a business return from an investment in SharePoint.

We could go on. If any of these are happening at your place of work, you know the pain associated with this.

7 Ways to Get More from Your SharePoint Deployment

Let's turn our attention now to seven ways that you can get more from your SharePoint deployment, starting today (or tomorrow).

With a clear grasp of what SharePoint is and some of the problems that you will experience if you do SharePoint wrong, let's look at the 7 ways that you can get more from your SharePoint deployment immediately. The seven ways are:

- Be Clear on Business Reason for SharePoint
- Embrace the Seamless Teamwork Approach
- Designate a “Go To” Person for SharePoint
- Re-Examine How Business Gets Done
- Create a Set of Standard Templates for SharePoint
- Ensure Your IT SharePoint Governance Strategy is Excellent
- Consider 3rd Party Solutions to Increase Productivity

We will take each in turn, and for each, we will be clear about some of the next actions that you can do immediately.

(1) Be Clear on Business Reason for SharePoint

The first way to get more from your SharePoint deployment now is to be fully aware of why SharePoint is being used at your firm. What are the business outcomes that your senior managers are looking for? Or don't they know about SharePoint? If IT has slipped SharePoint in without going through a process of understanding what the business needs from SharePoint, then you are working from a place of weakness. Be warned.

To answer this question strategically, you need to know:

- What business strategies does SharePoint help our firm implement?
- Which senior people will evangelize the use of SharePoint, and therefore get the appropriate resources applied to SharePoint endeavors, and help break through the barriers erected by reticent end users?
- Which specific business people that you know are excited about the technology of SharePoint and how that technology can be applied to help them in new and enhanced ways?

The benefit of aligning your investment of SharePoint with business priorities, is that it elevates the view of IT from hardware and software provider to solution provider. As IT becomes an integral part of the discussion about how work gets done most effectively, then IT is taken seriously at senior levels. And from this recognition flows authority, a wider mandate, and greater opportunities.

There's a range of actions that you will need to take in order to align the world of SharePoint with the world of your business, and here are some examples:

Arrange to have lunch with a mid-level or senior manager in the next week, and enquire about the business challenges they are facing? You want to build a relationship with people like this, and create the opportunity for coming back with ideas and solutions to help them.

Set up appointments to observe people at work from their desk and in meetings, and note the pain points that they are experiencing on a daily basis. Such empirical data will give you a grounding for recommending new ways of working, and new tools that can help them in their work.

To get ideas on how other firms are embracing SharePoint, and the benefits they are experiencing, read through a couple (or ten, or a hundred) of the case studies that Microsoft has published on this topic. Visit <http://www.microsoft.com/casestudies/default.aspx> and explore! These case studies can then form the basis for a presentation to senior managers about how other firms are experiencing benefits from SharePoint.

Download the free summary document for Michael Sampson's white paper—SharePoint for Business—which outlines a 6-step approach to maximizing the business value of SharePoint for collaboration. If the summary document proves to be of interest, buy the complete white paper for your firm. See <http://resources.michaelsampson.net/2008/02/sfb.html>.

(2) Embrace the Seamless Teamwork Approach

Microsoft Press recently published Michael Sampson's first book—Seamless Teamwork: Using Microsoft SharePoint Technologies to Collaborate, Innovate, and Drive Business in New Ways (see www.seamlessteamwork.com). The point of the book was to show business people how they could embrace the out-of-the-box capabilities of SharePoint to support collaboration, and hopefully to make the case that SharePoint offers better technical capability to support everyday collaborative processes than current tools such as email and file attachments.

One of the key messages in the book is that SharePoint can be much more than merely a replacement for sharing files. In other words, we want to minimize the use of SharePoint as a replacement for the file server, but we need to show people and business teams how they could do that. So the book takes the approach that SharePoint can be used for three complementary strands:

- It can help the project team actually get the work of the project done.
- It can help the project team stay in coordination about who is doing what on the project, and when and how various people on the team need to undertake certain activities.
- And finally, it can help the project team share the context of what's going on in the wider spheres of people's work and personal lives, that impact on their ability to respond to others and work on joint deliverables.

The book is built around a fictitious but true-to-live case study of Roger Lengel and the project he is asked to lead through SharePoint at his firm, Fourth Coffee. While the exact project process in Seamless Teamwork is likely to be different to your project process—and that was both

expected and is absolutely fine—you need to take the main ideas of Seamless Teamwork and bring them to life at your firm for the business people using SharePoint to support collaboration.

The benefit of embracing the Seamless Teamwork approach is that it improves project productivity, and builds future capability amongst employees for how to use SharePoint effectively. The flow on effects are clearer lines of accountability, it's easier to add and remove people to projects, and because training time is decreased through standardization of templates and expectations, there's a faster time to business value.

To start on your own Seamless Teamwork journey, head over to Amazon.com and buy a copy of the book for all of the project leaders at your firm. Once they have the book and have reviewed it, schedule a workshop to work through the ideas in the book, and to discuss with them how the ideas they have for applying SharePoint. Given that the book advocates the use of certain functionality to support certain teaming processes, you may find that the very things you want the project leaders to do become things that they are rabidly asking you for. In other words, they'll create a demand for what you have to offer, and they'll think it was their idea all along, and you'll still get what you wanted them to do all along without having to resort to pleading.

(3) Designate a “Go To” Person for SharePoint

With the SharePoint software installed, business value can start to flow as soon as you align the use of SharePoint with the technical capabilities that are available. This requires consultation with different business groups about how they get their work done today, and follow-on analysis of how and where work process can be improved. This type of analysis is not generally what IT is good at, so you need to find and designate someone (or multiple someones) to form the bridge between the SharePoint group in IT and the business groups wanting to use SharePoint. Let's call them a “business process improvement analyst”, or for short, the “go to” person for SharePoint. And for your firm, there may already be such a group in existence—it's time to co-opt their help with understanding what SharePoint can do to help improve business performance.

The goal with having a go to person for SharePoint is that it puts a face on the technical capabilities of SharePoint. The individual concerned is able to explain to business groups in business terms how business processes and work practices can be improved with SharePoint, and then translate the business requirements into technical requirements for the IT group.

What's the next action? Look at the staff currently working in IT, and see if you have a natural boundary spanner on the payroll. If you do, refocus them on being the bridge between the capabilities of SharePoint and the possibilities and opportunities for applying SharePoint in the business groups. They will need training and mentoring to grow into this new role, as well as introductions to others inside the business.

(4) Re-Examine How Business Gets Done

When a group first forms, it has to make a decision how it will get its work done. This decision process is informed by the technology available to the group at the time, the previous ways that individuals in the group have carried out other similar work, among other factors. What happens over time, though, is that well-formed groups standardize on a particular way of doing things, and those approaches remain impervious to external shocks ... the comings and goings of new people, the technology that is being used, etc. So if you install SharePoint and give it to a well-formed group, the most likely outcome is that the group will make the capabilities of SharePoint work in such a way as to support the work process they already have. Thus by default, while the technology has changed, the work practice has not, and has merely been transferred from one tool to a new tool. Is this progress? No.

What's needed, therefore, is an intentional re-conceptualization of the way that works get done by groups when a new tool is introduced, with the goal being to improve productivity and effectiveness by eliminating unnecessary steps, cutting wasted elapsed time, and streamlining the distribution of accurate information so people are working on the right priorities.

The process of re-examining how work gets done comes down to observation, process mapping and process re-imagining. You need to gain

an understanding of the work that people are doing today, using the various tools at their disposal, and then get that understanding into an externalized representation that can form the basis of both discussion and analysis. Often an external person—an outsider to the group—can see things about how the group is working today that members within the group are unable to see. To members inside the group, the way they work is intuitively accepted as the best way of doing things, because they are operating within the system. To an external observer, however, they are not constrained by the non-articulated reasoning for why work is done in a particular way, and are free to challenge assumptions and suggest ways that the group can improve their performance.

(5) Create a Set of Standard Templates for SharePoint

SharePoint offers many out-of-the-box capabilities for building “sites”, or places for people to do their work. There’s the document library, the calendar, the task list, the custom list, the announcements list, and many more. With such capability comes a huge degree of flexibility to create exactly what is needed by a local team to get their work done. And for those working in larger organizations, it is pretty much guaranteed that most teams will see their requirements as being “unique”, and therefore worthy of a site design that is different to everyone else’s.

Be warned: this is a recipe for disaster, because as the number of customized sites increase, the ability for an end user to seamlessly move between different sites they are involved with diminishes rapidly. In other words, what a user learns in one site (about how to work, or track tasks, for example) will be different in a second site, and different again in a third site. This means that the user constantly has to think about how to work within team one vs team two.

Avoid the problems of having a proliferation of customized site templates by standardizing on “the way we do things around here”. For example, most organizations have “projects” of various kinds that are run through SharePoint, and the flexibility of the tool means that you can do one thing in a multitude of different ways. The idea, then, is to standardize on a particular way of doing things, and make a set of standard templates for team project management in SharePoint. This means that depending on the size of the project, a team then only has to choose the right site template.

There will be some key differences between the way the site is structured for small, medium and large projects:

- Small projects will have all design elements in a single team site, and will probably have only one of each type of design element, e.g., one Document Library
- Large projects—and they are “large” because of the number of people involved, or because the project contains multiple linked stages—will probably have multiple sub-sites under the overall project site, along with say, multiple document libraries in each site, each focused on a different group or a different type of document.

One of the main aspects to design for is the ability to perform roll-up and aggregation of like assets across a collection of sites. For example, tasks assigned to a given individual should be able to be aggregated across multiple sites, giving each individual a coherent view of what they are supposed to do. To make this even a possibility, however, you will need to base the design of task tracking off a common design element.

The next step to move ahead with the creation of standard templates depends on where you are starting. If SharePoint is already in use at your firm, and you have a proliferation of custom templates already—which means that you feel the pain now—then it’s time to review current sites to look for opportunities for standardization. For example, when the same activity is being undertaken in different ways, there exists a prime opportunity to create a standard way of doing things.

If SharePoint is about to be unleashed, then now is the time to create standard ways of doing projects through SharePoint sites. You won’t get it perfect on day 1, but by starting with a small set of templates and by setting the social expectation that customizations will be tightly controlled, you create a great starting place.

(6) Ensure Your IT SharePoint Governance Strategy is Excellent

Governance for SharePoint is worth a whole white paper in and of itself, and maybe even a whole book! So we don't expect to address all of the key points of governance in this white paper, suffice to wave the flag that getting your governance strategy and approach in place before going too far with SharePoint is really important. Here's why: on the social side, SharePoint can fundamentally re-wire the way that people get their work done and thus what is expected of them in order to carry out their work. Thus you have tremendous power over the way that people work. And on the technology side, there are a raft of decisions that you have to make that have deep technical consequences and implications for your business. A governance strategy ensures that this power is wielded well and for the good of the business.

- Some examples the technology decisions are:
- The number and variation of content types to use.
- The metadata to put in place, and which metadata values to mandate vs which are optional.
- The variation permitted in site templates, as we've discussed above.
- The degree of custom development that will be embraced.
- The willingness of the firm to customize templates that come from Microsoft.

A governance strategy puts in place the checks-and-balances to ensure that decisions of this nature, in addition to a host of decisions about appropriate use and adoption of SharePoint, are made with due process. The benefit of a great governance strategy is that it launches SharePoint on a trajectory for success, by lining up all of the social and technical factors required to make SharePoint work at a social and technology level.

There are many resources available on governance for SharePoint, and a browse or search of the Internet will bring a plethora to light. Three resources of note as you start on your governance journey with SharePoint are:

Microsoft's SharePoint governance web site, at <http://technet.microsoft.com/en-us/office/sharepointserver/bb507202.aspx>;

Chapter 12 of my book Seamless Teamwork, which addresses the thinking involved in scaling the Seamless Teamwork approach to the enterprise. Chapter 12 was co-authored with Grant Margison of Information Leadership; and

The book Flapping to Flying, co-authored by Grant Margison and Sarah Heal of Information Leadership in New Zealand. See <http://www.informationleadership.com/ourbook.html> for details.

(7) Consider 3rd Party Solutions to Increase Productivity

With SharePoint being a "platform-technology", Microsoft has to decide which capabilities to support out-of-the-box, and which capabilities to leave for its business partners. One of the areas that SharePoint users benefit greatly from a third-party tool is addressed by Colligo Contributor. Contributor addresses two main ideas: the first is the provision of offline access to most SharePoint data (note that the wiki capabilities in a SharePoint site are not currently supported for offline editing in Contributor) for people working away from an Internet connection, and the second is for people who "live in SharePoint", and therefore want a more responsive client application rather than using a Web browser. Contributor addresses both, and by lowering usability barriers, helps with increasing the adoption of SharePoint among your user base, and as a flow on effect, it helps with getting more content into SharePoint so it can be managed and shared.

In exploring the potential for Colligo Contributor to help your users, identify the people and groups who fit the two ideal profiles of Contributor users: those that are offline on a regular basis but still need access to their SharePoint sites, and those who work in SharePoint for a high proportion of their day. Once you have identified these groups, get the [30-day free trial of Colligo Contributor](#), and assess the benefits with real people at your firm.

The end of this white paper contains a section on Colligo Contributor so you can learn more about the product line and its capabilities.

Summary

We've previewed a lot of ground that you'll need to cover in your race with SharePoint, but don't become disheartened and retreat to the server room. This is where the real action is at ... taking what Microsoft has made available in SharePoint and putting it to great use within your organization. Let's summarize what we've looked at:

SharePoint is a broad-brushed platform technology from Microsoft to support many information worker processes in organizations. And it's clearly important to Microsoft—given the centrality it's taking in the Microsoft technology stack, and in the revenue that it's bringing into Microsoft's coffers.

The tremendous range of flexibility offered by SharePoint means that it can be melded to do many different things for an organization—which is good, and bad. If you walk into the bad territory, then SharePoint will quickly devolve into a chaotic and unmanageable environment that causes great grief and consternation.

There are some very specific activities that you can do now to get more from your SharePoint deployment, such as increasing your awareness of the business reasons for SharePoint at your organization and aligning what you do with SharePoint to those reasons; embracing the Seamless Teamwork approach to make SharePoint the authoritative place for people to work and collaborate; re-examining how business gets done in light of the new technology capabilities that SharePoint brings to the table, rather than just re-creating old ways of doing things with the new tool; and looking at how third-party tools can increase user adoption and team productivity.

Race well ... looking forward to celebrating with you when you reach the finish line!

About Colligo Networks Inc.

Colligo is a leader in client collaboration software, helping organizations drive SharePoint adoption by providing an intuitive user experience that better integrates SharePoint into the way users work on their desktops. Information workers can easily access, modify, and create SharePoint documents, forms, lists, and metadata through familiar desktop interfaces. Contributor Client delivers instant access, online and offline, for mobile and remote workers. Contributor Add-In integrates Outlook with SharePoint for better email and document management. Colligo is Microsoft Gold Certified. Learn more at www.colligo.com.



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