

Implementing SharePoint Successfully

Our pain, your gain: The key learnings through real implementations



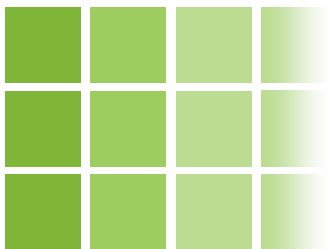
Executive Brief

Executive Summary

At the recent SharePoint 2010 Conference in Las Vegas, the first question posed to Microsoft's CEO, Steve Balmer was "What have you given us to increase the success of SharePoint implementations in 2010, as we are sick of fixing broken, poorly designed and ungoverned solutions?". The answer was somewhat vague; in our opinion the reality is that SharePoint does not fail because of tools, it fails because people fail to understand the effort and organisational change required to undertake a successful SharePoint project.

SharePoint has a broad reaching technical capability and integration with the desktop unlike any other product – and there is a general belief that it should "just work". While SharePoint clearly has the potential to reduce, replace and simplify any IM landscape, the reality is it often fails to deliver on expectations.

Do we think the new features of 2010 change this? No, we think that organisations should look to the foundations of a successful methodology for implementing SharePoint before they look at a new version as a panacea to their problems. This whitepaper discusses a range of strategies that have proved successful in ensuring SharePoint meets the expectations of the business and delivers return on investment.



History Repeating Itself

For many, the SharePoint journey commenced in earnest with the release of Portal Server 2003. Even though this release lagged well behind the main competitors in the “Portal” space in terms of features, it continued to gain significant traction through innovative licensing models and its fit with the rest of the Microsoft suite.

With the release of MOSS 2007, SharePoint was considered by industry analysts to have evolved to the point where it had the potential to replace existing Information Management (IM) systems, reduce IT “clutter”, cut ongoing maintenance costs and simplify the solution landscape for business users.

Now, three years on there is much talk about whether 2010 will solve all of the shortfalls we know exist on MOSS 2007 and whether it can deliver a unified IM framework to business.

While early indications of 2010’s capabilities are extremely positive from a technical and capability perspective, we would caution organisations who are looking to 2010 as a silver bullet. In actual fact, the current excitement around 2010 mirrors that of the release of MOSS 2007.

Given these facts, we believe businesses have to stop looking to new releases or software to fix underlying implementation issues and focus on how they implement SharePoint, as there are a number of implementation issues that are prevalent throughout the majority of failed SharePoint installations.

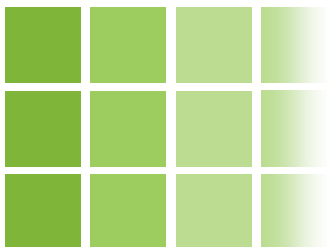
The next section of this whitepaper is intended to provoke some thought around the critical success factors in implementing SharePoint.

Develop a Message

For many, the questions posed when initially thinking about SharePoint is “How can I leverage the potential of SharePoint?” and “Where do I start?” Interestingly this is not a question specific to SharePoint, we have seen this question asked of Portal software since the late 1990’s. SharePoint and indeed Portals in general have the ability to cut across many facets of a business, from the way end users store and interact with information, to existing IT systems and even political boundaries.

Portals, especially Information Management focused Portals such as SharePoint, have the potential to replace workflow systems, business intelligence tools, content, document and records management systems and collaboration tools. Importantly, they also have the potential to re-shape bespoke application development teams. Such broad reaching ramifications can threaten parts of an organization and sometimes even their IT partners - whether that is system owners who feel their platforms may be “replaced” or developers who feel their jobs are under threat from the implementation of these highly “configurable” end user focused tools.

While the reality of the threat is generally somewhere in between and can be managed, failure to understand this impact and deal with it very early on will almost ensure your project



fails and you will potentially face the prospect of the project being constantly undermined by detractors.

In addition, there is often a lack of a common understanding about what SharePoint is and what it can deliver. Project teams presume that everyone will “get it” and in our experience they don’t.

Combined, these factors ensure that a “Field of Dreams” – “Build it and he will come” approach is flawed. It is essential to educate the business, develop your message about SharePoint, communicate it to the business and engage change champions to assist you in fostering the growth of SharePoint, as well as reach a joint understanding of what SharePoint is and isn’t. Only then can you start to work together.

Where is Your Business Case?

Very few SharePoint deployments start with a well thought out business case that outlines long term funding, success factors or alignment with business goals and plans. When we ask to see business plans, we often get a blank stare, in many cases there is not even a strategic statement about SharePoint or the online strategy in general. SharePoint has reshaped software’s ability to slip in to a business almost unnoticed. In general, we feel this is because it is already part of the IT licensing model – it doesn’t have to be procured, just installed.

As a result, SharePoint is often quietly put into action through stealth, and before anyone can realise what has happened, the business has yet another IM repository that isn’t doing what it was supposed to do – whatever that was – and an IT infrastructure that isn’t coping with demand. This is fraught with risk; and when it occurs there is almost a guaranteed lack of rigour around the control and safety of information.

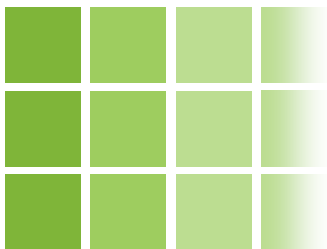
In addition, SharePoint is rarely selected as the result of a rigorous software selection process; it is just a de-facto choice. Consequently many organisations fail to assess the total cost of ownership of the design and implementation as the software is considered “free”.

It is no surprise therefore that SharePoint doesn’t often meet business needs. Without the proper rigour at the start of a project, how do you measure success and ROI, how do you obtain funding, how do you know where to start and indeed the scope of the project? In turn, how will you sustain and govern it?

Ask yourself this; if you paid a million dollars for SharePoint and had to give up 20% maintenance a year from your IT budget, would you approach it the same way?

Consult with the Business

We see many SharePoint developments owned and implemented by IT without any business consultation. We regularly see the first SharePoint implementation for an organisation focused on the IT Department, which they believe will then undoubtedly “impress the business when they see how good it is”. Often this is because they feel the business won’t be interested in the software – and they are right. The reality is the business will never be interested in software unless it delivers tangible business returns - the business needs to understand “What’s in it for me?”



The other common scenario is to implement SharePoint as a static content “Intranet” with a view to adding to it later. We have seen many examples where significant effort has been expended trying to make SharePoint look, feel and act like the old intranet so users don’t notice and don’t require training.

SharePoint does not look, feel or act as a “traditional intranet” nor should it be architected like one. SharePoint will have a significant effect on the way your users work with information, systems and each other. The “let’s just replace our existing intranet” approach does nothing to recognise the power that SharePoint gives to an end user and its potential to positively reengineer your business processes.

We can guarantee that within a week of taking this approach, some IT savvy users in your business will have figured out how to build their own web site, duplicate content and functionality and create their own mini “intranets” creating an even bigger problem for the IT Group. We have even seen some organisations try and counteract this by trying to turn the majority of features off – which defeats the purpose of the platform and tends to break interaction with the desktop.

A more viable approach is to work with the business and ask them some direct, targeted questions about their problems and get them to tell you how they would like to operate. You can then help them map this back to SharePoint features and functionality. This forms the basis of a targeted Proof Of Concept with demonstrable business outcomes.

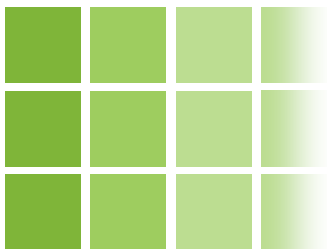
This need not be an extensive exercise, even a brief amount of effort in this regard up front will help focus your SharePoint Roadmap, give you some demonstrable deliverables and business outcomes and engage some SharePoint business “champions” that will assist you in implementing the change.

Understand SharePoint’s Place in the Information Management Framework

It is essential that you understand SharePoint’s place in your Information Management (IM) framework. Is SharePoint going to function as the single entry point to all applications?; Will it be your Business Intelligence (BI) tool?; and Will it be your Document, Records or Content Management System? It is important that you define its role in the business right up front.

We have seen many instances of SharePoint being acquired on the belief that it integrates easily with other tools – “the vendor said they had web parts, so it must be OK”. We have even sat in vendor meetings where they have said that “there is no problem integrating SharePoint and “Brand X” document management systems, as there are web parts that allow them to work together.”

Do not buy into this. SharePoint integration is difficult and you need to pay particular attention to process and change management issues. For instance, in the case of document management; How do you synchronize metadata?; How do you deal with users who work with documents through the email client and not in SharePoint?; How do you design a file plan or taxonomy that deals effectively with “collaboration” project structures?; Do you use SharePoint libraries and when do documents transition from SharePoint into a Document Management System? In addition, how do you get the records management people to buy into the project when the organisation already has a records management system?



Web part integrations do not answer these questions. You have to plan these strategies and interactions carefully. SharePoint is much more about business process, behaviour and culture than it is about technology or integration. In recognition of this, users have to understand when to use it, how to use it, when not to use it and how it interoperates with other software and systems.

If your company does not have a diagram that lays out the IM framework and the function of each tool within it, create one. In order to do this effectively you have to spend time analysing the overlaps between what you have and what SharePoint can provide.

You may, for example, have 3 or 4 different systems that manage documents; do you integrate them, replace them, or do nothing? This doesn't have to be as extensive analysis; it can be as simple as you need it to be to understand how everything can fit together. By understanding this, you can also start to plan out system retirement which in turn gives you immediate ROI.

In this way there is an opportunity for SharePoint to be funded largely through the use of existing money spent more efficiently.

Partnerships through Governance

It is essential that organisations put in place a Governance Plan for SharePoint to avoid team site and content sprawl. On too many occasions organisations develop a SharePoint solution only to find that it becomes unmanageable and fails to deliver on expectations. A governance plan will define the role of the Portal, the owner and decision making authority and provide guidance around usage. This will also ensure that users are provided with a consistent, high quality experience that delivers business value.

Towards a Better SharePoint

To sum up, at Velrada we believe in some fundamental steps that will underpin a successful SharePoint journey. The key aspects are:

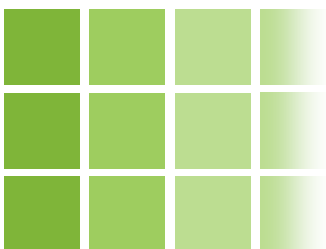
Developing a Business case – you need a business case, demonstrable ROI, an Executive business sponsor and an understanding of what you want SharePoint to be in your organisation.

Understanding User Requirements – SharePoint is a business tool, and the business should own the requirements; ultimately they should own the solution. Even a brief targeted exercise to understand the business' issues and problems, will help you focus your attention on tangible business outcomes.

Understanding the IM Framework – Once you establish a need for SharePoint, you need to evaluate the organisation's IM framework to determine where SharePoint will fit into that framework. Will it be the single point of entry to enable you to build composite business applications from disparate systems?; Will it be your document management system?; Will it provide your BI tools, and will it be your central meta-store?

Have a Roadmap – A roadmap represents your goal posts. We favour highly visual, flexible roadmaps that are formulated collaboratively with stakeholders. The roadmap will guide you at all times.

Identify "Anchor Tenants" – Like a shopping centre, it is critical that your SharePoint solution has identifiable anchor tenants – the "Myer" and Target" of the framework that draw people to SharePoint and offers them real demonstrable value that is not replicated elsewhere. For instance single click access to pay slips is classic anchor tenant.

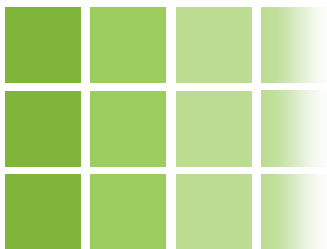


Education of Key Stakeholders – Information sessions, road shows and presentations should be developed and delivered to the business in order to engage end users in the process and to get buy-in.

Create a Solution Design that Capitalises on the Power of SharePoint – SharePoint is not a traditional content management based intranet therefore don't try and make it one.

Undertake training and Change Management – Only a small percentage of Microsoft Office Word's features are used because users are not trained. Not only will you see a similar outcome if you don't train SharePoint users, your design will break far more easily and with more significant impact if users fails to understand the technology. Ensure you educate and communicate changes to your users, be honest about the business impacts, help them through the change and listen to their concerns

Creation of Governance and Ownership models – the governance plan provides the framework for managing the environment and ensures that users are presented with a high quality experience that delivers business value.



Why Velrada?

While there are a multitude of Microsoft Gold Partners, Velrada is a company that understands SharePoint from a strategic business perspective – we are not an “IT development shop”. We will focus on how SharePoint can deliver demonstrable business outcomes and work with you to develop tangible business returns.

- We have been working on large scale Portal projects since their inception; as such we are best placed to understand how SharePoint will fit into your IM framework, how it will impact your existing IT solutions and how it is likely to impact your business and business users.
- Our goal is to form partnerships with clients focused on knowledge transfer; we want you to effectively manage your SharePoint solution moving forward.
- We understand how to start small however we always plan for future scalability.
- We understand SharePoint’s strengths and weaknesses and we are not afraid to talk about them.
- We start with understanding your business needs and provide a diverse range of services – we are not just strategy consultants or developers, we deliver an end-to-end service.
- We have broad industry sector experience and know how SharePoint applies to these different industries, the tools that are likely to be required and where the different IM technologies strengths and weaknesses lie.

Velrada SharePoint Offerings

If you would like assistance with your SharePoint solutions, we have developed an extensive library of methodologies, strategies, toolkits and presentations that can help your business. Our programs start from five thousand dollars, and include:

- Business Case development
- Current state / future state assessment programs
- Business Requirements Gathering
- Solution design and architecture, including design of Proof of Concept Scenarios
- Integration advice, design and planning
- Governance advice and planning
- Development of your SharePoint and IM Roadmap
- Design, Information Architecture planning and implementation



Andrew Fisher is a Managing Consultant with Velrada. With 20 years' experience in IT, specialising in Portal, Enterprise Content Management and Metadata solutions. His focus is on providing significant business improvement through the development of innovative technology designs.

While experienced across a range of Enterprise Solutions, Andrew was proactive in introducing MOSS 2007 to the Perth market, and is well known in the SharePoint community. His clients have included BHP Billiton Iron Ore, Uranium, Stainless Steel and Aluminium, the Office of e-Government, Woodside, the Water Corporation of Western Australia, Lloyds TSB Bank in London and the NT Government.



For more information

To learn more about Velrada
Information Management Services
contact us directly or visit:

www.velrada.com

© Copyright Velrada Capital Pty Ltd 2010

Velrada Capital
Level 3, 220 St Georges Tce
Perth Western Australia
6000

Produced in Australia

Other company, product and service
names may be trademarks or service
marks of others.