

A Framework to Increase SharePoint Adoption within your Organization

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Microsoft SharePoint provides a vast number of capabilities that empower business users. For example, SharePoint enables users to collaborate on documents with each other, tag and rate content, self-publish, track group projects, and even develop their own productivity solutions. However, even with this amount of power in hand, users (and the organizations they work for) can benefit greatly from having a clear SharePoint Adoption Plan. Why? Because SharePoint is often something, that users can benefit from, but don't necessarily have to use to get their job done.

A SharePoint Adoption Plan describes how the benefits of your SharePoint deployment will be communicated to users and what kind of training you'll provide. An adoption plan helps you establish the following:

- **Power Users and Influencers who can “peer coach” fellow users**
- **A plan for Communications and Buzz**
- **A Comprehensive Training Plan**

In this white paper, you will learn how to plan, organize, and improve SharePoint adoption within your business.

Introduction

When technologies advance, there are new capabilities, fresh functionality, added capacity and additional possibilities for change introduced into an environment. Improvements are achievable that weren't feasible before! But then the onus to capitalize on technology advancement—a new solution, a software upgrade, a hardware enhancement—swiftly shifts to the innovation leadership required to implement and realize those ground-breaking benefits. Leadership is the key requirement to making the promise of new technology fulfilled in a firm's everyday work, not the technology itself.

If we look at how technology has changed the way we share, communicate, and interact with each other in our personal lives, it's obvious that it can also have a positive impact on the way we work together. People recognize this and are actually expecting things like collaborative tools, social networks, instant messaging, video calls, and seamless sharing experiences at work. However, it is much more challenging to drive technology adoption in the workplace than in the consumer space, because ultimately that might mean changing how people work. Change is hard, even if the end result is a more connected, efficient and productive workplace.

The truth is, no matter how powerful a collaboration solution is, it must be easy to adopt or users will avoid it. In order to leverage the full potential of SharePoint's collaboration features, your organization must overcome the barriers to SharePoint adoption.

So what's the best way to successfully drive adoption of your technology deployments, specifically SharePoint, in the workplace?

Must-Have Elements for Your Adoption Plan

There are a number of key steps that you should consider as part of your adoption plan. You don't need to implement every single one of them, but you should evaluate each of them carefully to determine whether they apply or the degree to which they apply in your specific case.

- Define Your Vision
- Know Your Audience
- Identify Relevant Use Cases
- Help Users Understand the Value
- Measure Success and Expand

Define Your Vision: Gather input from every department across the organization

The IT department with input from marketing, human resources and a handful of other participants often drives SharePoint projects. Executive management typically establishes the project requirements and then development begins. While this approach can jump start a SharePoint project, it isn't necessarily a good start. Without input from all potential users, the design may be inadequate—or even completely unworkable. Before you start to build your SharePoint website, it is critical to include every functional group in the planning phase. You don't have to include every requirement or feature idea in the initial rollout, but including everyone in the planning process

increases the likelihood that users in every department will leverage the technology once it's deployed.

Before rolling out SharePoint, take a step back and think about why you acquired SharePoint in the first place? Was it part of a specific technical requirement, as part of the IT upgrade cycle, or did you hear specific needs from the business that can be addressed with SharePoint? Identify that key deployment driver, be it working better together by breaking down organizational silos, or meeting compliance requirements by better managing your company assets.

**Why users fail to adopt Microsoft SharePoint?
Users are expected to create or manage SharePoint sites with little or no training.**

If your primary goal is SharePoint adoption, you need to get everyone in the organization on the same page and have a clear understanding of the value that SharePoint brings to the group and how to effectively take advantage of it. Your vision should inspire people. It should allow everyone to recognize that it brings many great benefits not only to the organization, but to individuals as well. As such, sharing your motivation, along with how you plan to get there, will be crucial for your success.

When defining your vision, always start by involving key stakeholders and business sponsors. This will help you to ensure that your approach is aligned with the top priorities of the business, get executive support for your project, and support the idea of SharePoint being a critical solution for the business. As part of this process, identify the key business drivers and existing organizational needs. Next, consider how SharePoint can be instrumental in meeting these needs by changing how people work together within the organization-with customers, partners, or by connecting SharePoint with key line-of-business systems that matter to the business.

The goal of your vision is to clarify and simplify what business goals you want to accomplish in a defined timeframe. This will positively influence how you will utilize SharePoint within your organization and keep everyone focused on business priorities.

The easiest way to get started is to think about SharePoint as “the new way to work together”. Think about this, and how this applies within your organization, how it can help people solve the daily challenges they are facing when it comes to getting things done together: sharing ideas, information, planning, creating, producing, improving customers and partners satisfaction, selling, or dealing with business processes every day.

Simplify. Start Small. Stay Focused: Know Your Audience

Take a look at your existing intranet to see which features and content are currently being utilized. Review website analytics and usage reports to ensure that popular pages, content, or features are included in your new SharePoint deployment. Even an internal website with low usage can provide valuable information on which features will be missed if they are not incorporated. Without doing your homework, you risk alienating users and creating an uphill battle to increase SharePoint adoption.

SharePoint can help people in many ways: be it sharing content and ideas, discovering information, getting organized, streamlining business processes, or connecting to line of business systems-SharePoint can enable a

number of critical business solutions.

A key challenge is that, from an end-user perspective, SharePoint can do so many things that it can be difficult for people to get their heads around it. Although the majority consider SharePoint valuable to their department, it's often hard for people to realize the full potential of a solution and how it can help them achieve business goals.

In order to be successful, you need to get things right at the beginning. You need to simplify, and start small, so that SharePoint doesn't become overwhelming for non-technical people. Although you will find that simplifying will take more time to kick-off your project, it will save lots of time in terms of support, and avoid confusion in the long term. You need to plan for a phased approach, where over time of your user base will expand, and where you will add more use cases to unlock the full value of SharePoint within your organization. Keep in mind that in order to maximize your chances, you need to start small and expand later. We will talk later about the right balance between closed pilots and organic growth to ensure that users own their SharePoint experience. You will need to focus on the most appealing scenarios for business users, and target the right teams.

A good place to start is storing and sharing documents. Right now, many people are still relying on email to store and share documents, losing hours of productivity tracking changes and versions that spread over time. Showing people how they can use SharePoint to store and share information while maintaining a reliable, sharable, single version of the truth could produce a powerful first impression. Don't underestimate the power of starting with a simple usage scenario such as this.

When picking the right teams to start with, look for those that face a business challenge that can be solved by SharePoint, and that contain a mix of influencers and sceptics that can simultaneously drive excitement and overcome doubt.

Identify Relevant Use Cases: Personalize SharePoint for Your Organization

Everyone knows the value a strong brand image can have on an audience. Your SharePoint website should reflect your existing corporate culture and reinforce the online experience. With SharePoint Designer, you can create a look and feel for the site that fits the personality of your organization and matches the mission and values of your company. Tap the expertise of your marketing team for some initial guidance and then use the customization tools in SharePoint to provide a personalized online experience and one that gets users excited about the site.

You will need to engage with representatives from various business units to identify relevant use cases and business issues

**Why users fail to adopt Microsoft SharePoint?
Users are not involved in building the site; therefore it may not meet their needs.**

**Why users fail to adopt Microsoft SharePoint?
Document management features are underutilized or misunderstood.**

to solve. An effective way to do this is to review existing pain points that they have. You need to choose and prioritize the use cases that are important but also have a high likelihood of success if solved properly; you need to choose a problem that represents “low hanging fruit” if at all possible.

As part of the adoption research, we identified the top use cases being addressed with SharePoint by organizations today, either at an enterprise-wide or departmental-level.

For example, some specific business needs that appear to be universal across all organizations and people include:

Store, sync, and share your content

A legal counsel is composing a document and needs to receive feedback, comments and suggestions from various stakeholders in order to complete the deliverable for the client. He uses SharePoint as the one central location (1) to confidentially store the document and (2) to invite others to securely share comments, make edits, and add supplementary information.

Prior to using SharePoint, the attorney would be required to email several versions of the same document back and forth. As the document might likely be offline, there would often be delays in receiving comments from certain people as well as uncertainty around which document was the latest version or who had made which change. Now, SharePoint makes document sharing and collaborating more productive, more streamlined, and more accurate.

Keep your projects on track

A global technology company, which, designs and develops visualization solutions for a variety of selected professional markets uses SharePoint for the combined purpose of collaborating on documents and information in order to streamline projects. They have many projects in the year, with multiple teams working on similar deliverables, and they use SharePoint to make sure everyone is on the same page with regard to project status, project communication, and collateral that is needed for internal purposes or for external marketing.

With SharePoint, having several projects underway at the same time is no longer a cumbersome endeavor. Because project materials can be better sorted within SharePoint, multiple projects with multiple teams/members can be managed more efficiently.

Find what you need

A legal advisory firm wanted to enable their employees to better find the right information or person within the organization.

Prior to using SharePoint, a person would have to email a group (or the entire company!) to see if anyone had the particular information; if not, they would try to locate the information in question by trial and error. Within SharePoint, the firm set up a profile-based search function that enables the scouring of profiles to bring forward the most relevant information.

We've provided some common scenarios and success stories from previous client engagements here; keep in mind that your specific scenario will depend on your organization. When engaging with business users to help them identify how to best use SharePoint, always approach it from their perspective. What pain points do they have to deal with regularly? Do they have manual activities that can be automated? How about saving time?

Execute: Help Users Understand the Value

The typical intranet is a document repository where users simply upload and download content. SharePoint offers much more, but you need to help educate users beyond their current workflow and encourage them to do more than just store and access documents. Be sure to include a training plan and build examples that leverage the community features. You may find that users who had no idea what they could do with SharePoint can now no longer live without it. Just one single user who adopts SharePoint and pushes more users to collaborate in the SharePoint environment can do wonders for a SharePoint deployment.

At this point, you should have selected a few use cases and a group of people to start with. Next, we need to ensure users are empowered to make things happen.

Empower People

Engage Leadership

For any enterprise-wide initiative to be successful, having executive support and sponsorship is necessary. Without it, it's often an uphill battle to drive SharePoint adoption. You will need to engage leadership and identify your executive sponsors. An effective way to involve leadership is to speak their language and demonstrate the business value of SharePoint to the organization. While better collaboration with SharePoint is a great benefit, what does that mean in dollars and cents? With tight budgets these days, how organizations spend their money is put under a microscope. That's why it is important for any decision maker to be fully aware of the business benefits SharePoint can bring to an organization in terms of productivity, risks management, and costs reduction.

**Why users fail to adopt Microsoft SharePoint?
Users fear their confidential information will be shared.**

Create Excitement

You want people to be excited about the opportunity to improve their day-to-day work process. Business users are focused on getting their jobs done, and they will get excited if they believe the solution will make their lives easier. This becomes a solution-centric conversation, not a technology-centric conversation. The approach will vary from one group to another.

For example, when engaging with the accounting team, the conversation may revolve around improving the process of collecting financial data or even how to best surface monthly reports. Whereas with project managers, the conversation may revolve around project schedules and task updates. You might reuse the same SharePoint features across multiple use cases, but you will need to tailor your language to each audience you talk to when presenting the solution and its benefit.

Facilitate Change

We want them to love this tool, and part of that is not only listening to employees, but taking that feedback and truly turning it around and implementing that feedback. Change will be difficult, even for those that are excited about the opportunity. To be successful, it's critical to involve users from the outset, but also let SharePoint belong

to them, enable feedback, and act on it.

You should communicate the plan to business users, and allow them to participate and become personally invested in improving the solution. You will need to start with a small group of people (a pilot), which will enable you to easily gather feedback and: improve either the solution, improve the way you communicate, or both. Avoid a closed pilot and allow users to organically spread and fully realize the benefits that SharePoint can provide among all of those they interact with on a daily basis. The adoption research showed that this type of “organic” learning to be among the most effective methods and will provide a positive (and highly relevant) first impression to new users. Therefore, you will also need to think about how to make SharePoint more open and to provide a safety net: your governance plan. Governance will establish both guidance and user responsibilities for when people start using SharePoint.

Think of your governance plan as something that reduces risk. It's analogous to having traffic lights and anti-lock brakes when driving cars; neither will restrict where you can go, but both will make it safer to do so. Couple that with driver's education (training) and a reason to travel (key use cases) and you have great automotive adoption. Using this analogy, think about how you can apply policy, guidance, and training to your SharePoint rollout to improve overall adoption.

For example, if people create sites to centralize information and improve group collaboration, they may be also responsible for site and user management. This means that they should take appropriate training to perform these site management tasks; otherwise, you may be requiring a level of responsibility without having provided adequate training and guidance.

Groom Champions

We showed a few people how to use it, a couple of heads, and they started training their people and they started getting good at it, they started knowing the ins and outs, and it's gotten better.

Early adopters can effectively help scale and drive adoption. These individuals-let's call them Champions-are business users that are not only passionate about what they do, but are equally as excited to evangelize the benefits of SharePoint to their peers. Surely, your organization has a set of people passionate and ready to help others as well. You will need to identify those select few individuals that will help create excitement and drive adoption. They will play a key role in the long-term adoption plan.

Many people learn from their peers because they can easily relate to each other, trust each other, and they know they are facing the same constraints or challenges. Therefore, you need to think about how to bring people together as part of your adoption plan, so that they can learn, share best practices, and ultimately grow the user base.

You can work with Human Resources teams to provide some structure (mentoring/coaching/lunches/user groups) and recognition (Gamification techniques, awards, and points) to those people that give their time to help others. From informal to more formal gatherings, you can organize lunches, roundtables, and set up social networks and a shared knowledge base to share tips & tricks.

Target your audience

Business users will already be educated on the business process and activities associated with the use case that matters to them. As such, SharePoint-specific education can be delivered in bite-size portions, rather than a whole meal at once. The goal is to enable people to use what they need, not educate them on all the capabilities of SharePoint—at least not yet.

In addition, you will find that some use cases will have a great impact on everyone within your organization (like store, sync, share content), while others will impact different groups like HR, Finance or Production & Operations. This could determine your training approach.

For example, there may be a training course for employees in accounting where the scenarios and examples are focused on their business activities. More importantly, the course should clearly identify why using SharePoint is valuable. This can be done by highlighting a common activity that can be improved when using SharePoint, such as improving regulatory compliance.

Apart from showcasing the business benefits and capabilities of SharePoint, the training should educate individuals on what's expected of them. Ideally, these roles and responsibilities are defined in your governance strategy.

Measure Success & Expand: Don't Just Move Old Content to a New Home

Simply migrating all your current content to the new SharePoint platform is the easy route, but it can backfire. It is a worthwhile investment of time to inventory your current content and bring over only what is relevant. Whether you are replacing your existing site with SharePoint, or migrating from another technology platform, think carefully about how your users actually work and what information they really need. Deploying SharePoint is an opportunity to make a fresh start and introduce your users to new collaboration features that enable them to create and manage content more efficiently. If there is resistance to letting go of the old content, you can easily maintain it in parallel with your new SharePoint site until SharePoint has been widely adopted.

Once you've completed your primary steps, it's now time to use the success from the initial use cases to broaden adoption and further engage the organization. This expansion and increased engagement takes the form of several different actions that are key to growing adoption and success of the overall adoption plan long-term. This is where a lot of the work begins—work built upon the foundation you've established by demonstrating SharePoint's value to the organization.

Broaden Engagement

Earlier, we mentioned using pilots as a way to start with a small group of people to easily gather feedback and improve. Assuming the pilot was successful, you must broaden engagement of the existing use cases. If it wasn't

**Why users fail to adopt Microsoft SharePoint?
Inadequate user support after the launch.**

successful, you should regroup and assess what went wrong, and how to course correct. This is a key benefit of starting small—you can minimize risk and damage if you don't get it right the first time. A point to note is that before you broaden the user base, you should take the feedback from the initial pilot users and improve the solution and approach. Next, you should recruit more individuals, specifically targeting others who are likely to be engaged and excited about being involved. In parallel, be sure to update your governance plan to align with the growth of the platform. You should take advantage of the excitement you have generated to emphasize the value to the organization and to reinforce the responsibilities of key individuals. This success can also be used as justification for any necessary funding that is required for the forward-looking adoption plan.

As we mentioned previously, you can take advantage of various approaches to encouraging broader adoption, such as Gamification, which is the concept of applying game-design thinking to non-game applications to make them more fun and engaging. For example, you could reward users for using SharePoint for the first time, and then track each new task they are able to complete. Completing a series of tasks could earn them different 'merit-badges' that demonstrate their proficiencies in particular areas. This technique can greatly motivate people to learn more about SharePoint and grow user communities, keeping it fun and rewarding. Whatever you do, make sure it's relevant to what people need and want.

Showcase Success

If your goal is successful and sustained enterprise adoption, driving internal awareness and excitement is paramount to success. Think of this step as 'internal marketing,' which enables you to toot your own horn! This is no time to be shy, as other groups within the business will want to know about your success.

The best way to build momentum and drive internal awareness is to showcase your business successes. The extent to which you drive awareness will depend on how much success you have had, and how quickly you are expanding to the whole enterprise. Once you have demonstrated success, With respect to communication, there isn't one answer that applies to every organization, so you will need to assess your own situation and decide what is best. You should also consider consulting with other successful organizations and delivery partners for their guidance and expertise. The corporate communications team within an organization typically plays an instrumental role in driving awareness and ensuring organizational buy-in that drives sustainable adoption.

Identify New Use Cases

Another factor in your successful expansion of adoption is to establish new use cases and add their solutions to the overall adoption plan. You must continue to expand the user base, provide more solutions, and demonstrate additional value. As you define new use cases, you can treat each solution as a new pilot, following the previous guidance. You should ensure that your overall SharePoint deployment has the necessary capacity to handle any new solution or can make necessary scale changes. As always, your governance plan should be updated to include the new solutions and any operational, application, or information management policies that may need to change.

Conclusion

Organizations today need effective collaboration solutions more than ever. SharePoint can be that solution, but it must be deployed in a way that is inclusive and user friendly. By following these tips, you can create a collaborative SharePoint environment that users across your organization are eager to adopt.

Adoption of new technologies at work, like SharePoint, won't happen all at once. Adoption also won't happen without an effective plan. People won't rush to embrace a new solution unless it very clearly addresses their overall business goals. In addition, people need to understand how SharePoint will benefit them personally, how it will make their job easier, and how it will address the pain points they experience at work. By taking a planned, phased approach to your SharePoint adoption, you can ensure success.

About Trigent

Trigent is a CMM Level-4 technology solutions company with its US office at Southborough, MA, and India office at Bangalore. Trigent provides comprehensive solutions for business problems via outsourced software product and applications design, development and quality assurance. Trigent serves customers like Independent Software Vendors (ISVs), enterprises and SMBs in the High Tech, Healthcare, Education, Ecommerce and Manufacturing areas. Trigent's solutions help clients overcome budget, schedule and resource constraints.

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