

First Time SharePoint Implementation: Path to Success

A Trigent SharePoint Practice Whitepaper

The Challenge for SMEs for First Time SharePoint Implementation

Recent data shows that Microsoft SharePoint has proliferated in the industry amongst large and small business enterprises alike. Microsoft has sold more than 100 million?? SharePoint licenses to date. More than 75% of Fortune 100 companies have started using SharePoint and the adoption rate amongst small and medium enterprises (SME) has accelerated from running evaluation pilots to full scale deployment of SharePoint. Still, the full benefits of SharePoint are yet to be realized especially for the SME due to sub-optimal planning and a tendency for “quick and dirty” implementations, which undermines the promise of its productivity gains and cost savings.

SharePoint's wide appeal and apparent simplicity sometimes lull users into a false sense of security. They often jump into full implementation cycle without first adequately understanding business requirements, governance issues and infrastructure requirements. Users start with a simple out of the box implementation on “as is” basis because they find the experience interesting, and rather gratifying due to initial successes. Trouble starts when real requirements appear, unplanned extensions need to be put in resulting in uncontrolled spreads in data and information which in turn increases management and maintenance complexities. In extreme cases, such experimentations of inexperienced personnel could lead to disillusionment and loss of productivity, exactly the opposite of the intended results. These symptoms are more pronounced in the small or medium sized businesses since they often lack the organizational and technical depth to handle such challenges.

This situation can be readily prevented by following some simple steps and the full power and flexibility of SharePoint can be unleashed. Our experience has been that time spent on initial planning, implementation and iterative deployment approach under the guidance of experienced personnel can help avoid these pitfalls. Organizations that follow these simple processes can realize the promised benefits of SharePoint in all the six areas of its functionality.

Solution to the Problem

We describe a 3 phased approach which is particularly suitable for a “First Time SharePoint Implementation” and it can also be used as a general methodology for any SharePoint projects as such. First resist an urge to jump right into a full blown implementation just because it seems easy. By following a relatively simple framework such as shown below, users can segment the project into more manageable chunks and incrementally build on these small successes.

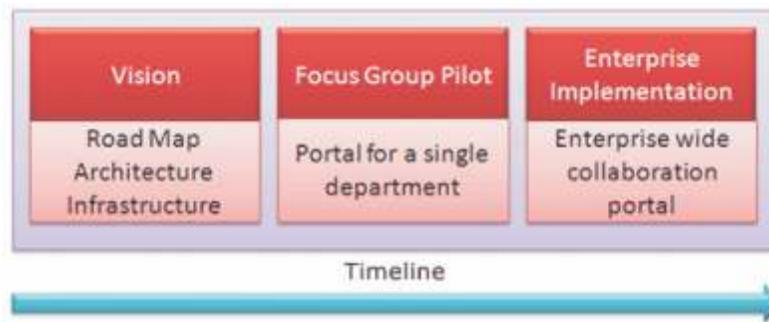


Figure 1: Phased Approach for First Time Implementation of SharePoint in an Enterprise

Phase 1: Vision

SharePoint functionality can be segmented into six major buckets, namely, collaboration, portal, search, content management, business forms and business intelligence.

By compartmentalizing each business requirement into one or more of these buckets, one can create a project road map that includes an overall approach, design, short and long term business goals, and a prioritized project implementation plan to encompass the business vision for SharePoint. For instance, an organization such as an educational institution may get the most “bang for the buck” by implementing a teacher training management portal or a simple admissions evaluation portal for prospective candidates. A sales driven organization may need a BI or dashboard and reporting feature initially. A legal firm may be best served by prioritizing document management functions. Hence the visioning exercise becomes very important to guide the implementation priorities of SharePoint.



A crucial step in visioning is a focused discussion with a clear agenda involving a representative group of people consisting of key stake holders, end users and the IT team. The discussion should elicit both near term and future requirements. These could include:

- ❑ Target Audience - internal, geographically dispersed and internet users
- ❑ Organization structure - departments, inter-departmental interactions and roles
- ❑ Depth and breadth of existing data and future growth, documents, other information systems
- ❑ Corporate security model
- ❑ Branding needs

These requirements drive the necessary infrastructure recommendations, high level architecture design and the SharePoint site hierarchy that form the foundation on which future development can be done.

Vision helps in bringing out the enterprise SharePoint requirements with a long term focus in mind. This results in a scalable deployment plan and helps visualize the reusable components to be developed in the initial stages and avoids rework at a later stage.

Phase 2: Pilot Implementation Framework for a Focus Group

The Vision exercise should identify a specific group of end users who share a common function in the enterprise such as a department or a business goal. This group generally has relatively better defined, pronounced needs that can be taken up for the pilot implementation for the organization. Since this is the first such project, an iterative and collaborative approach is preferred to maintain flexibility and support for the project. Since success of this pilot will define the subsequent buy in from other groups, it is important to ensure that all issues are adequately addressed for smooth project execution and deployment. One should go the extra mile in ensuring that issues such as given below are addressed:

- ❑ User training and orientation for SharePoint
- ❑ Documentation of business requirements and usage manuals
- ❑ Reviews and design mapping
- ❑ Post deployment user support and end user training
- ❑ Capacity planning and infrastructure operations planning

The following diagram shows the framework that can be used as a guideline to help implement MOSS successfully for one pilot group. This can be easily replicated for other departments and SharePoint can be extended across the enterprise successfully.

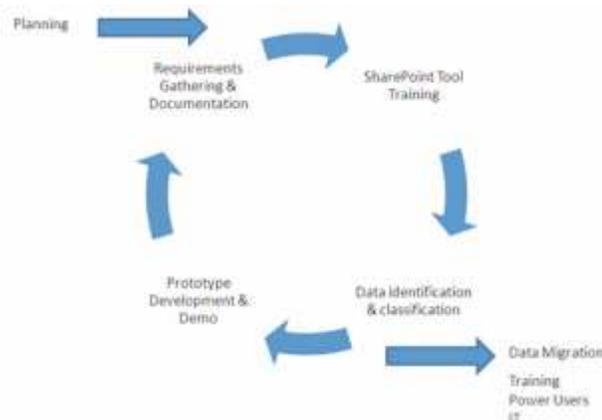


Figure 2 - Process for implementing Microsoft SharePoint with the first focus user group

This iterative process begins with planning that yields documented requirements, both functional and non-functional such as infrastructure, performance and security. Microsoft provides a wide range of templates for documenting these requirements. These templates can be simplified to some degree and made more relevant for easy use on this pilot.

The users are then given basic training in the use of the SharePoint tools, do's and don'ts and basic best practices. The end users have to be trained on the usage of the actual implementation, with special attention to the power users who in turn can assist the other users. The training has to be well structured and should adopt intuitive ways for it to be beneficial. E.g.: Multiple people can work together to initiate and complete a sample workflow feature rather than providing a demo on screen which can be very confusing.

If users don't understand SharePoint they avoid using it, which deters further development and projects could go into "cold storage"

Then the data to be populated into the portal is identified and classified. The migration tools are built and implemented, if needed. Once users have understood SharePoint operation, they could actively participate in grouping, categorizing and mapping their existing information or data into SharePoint features. This active role and involvement of the user group is very critical for the success of the project.

The implementation team should endeavor to meet end users' expectations with SharePoint's out of the box features as much as possible, and refrain from custom coding. The tendency of end users to expect a custom developed application should be minimized.

The users then use a prototype version of the portal. They offer feedback to the implementation team and this process undergoes a couple of iterations before launch for this group.

SharePoint in the end must be seen as a service and not an application. Even though a third party SharePoint services vendor may architect and implement the initial solution, it is the IT team or the end users who will own and manage the solution in the long run. SharePoint is all about the six components described above which are services to the end users.

The IT team or the end users must be involved in all of the activities right from the start. They have to provided necessary training on the SharePoint so as to enable them make informed decisions about security, implementing IT policies where required and administration of SharePoint.

Phase 3: Replicate and Extend: Implementation across the Enterprise

Successful implementation for the focus group will promote further usage and propagate further adoption by other groups. Much of the processes and implementation can be generally replicated, data stores can be extended and shared and deployment can be spread across different departments and geographies. The pilot will form the basis for further growth in terms of extensions and enhancements for the rest of the enterprise. Benefits include:

- ❑ Easier addition of other portals to support different functions
- ❑ Best practices from the initial implementations can help build better portals and improve productivity right from the start.
- ❑ Information silos across organizations can be avoided by design. Integration needs can be aggregated. Data and information duplication can be avoided.
- ❑ User training can be easily replicated and adoption can be faster
- ❑ The relatively small investment in defining and planning the process for the first implementation for a couple of departments yields massive returns over the long term.

Case Study

A leading nonprofit educational institution serving special needs children with autism and other related disabilities wanted to provide a common platform for its globally dispersed employees and instructors to easily collaborate, create, share and find information quickly and automate its business processes.

Prior to the SharePoint implementation, the organization had several servers to handle hundreds of documents on shared network, and employees relied on email for publishing information and maintaining forms and policies. SharePoint replaced several manual, paper based business processes improving efficiency, information flow, reports, forms and policies. This removed a huge overhead on the small IT team and the organization's infrastructure. It also provided the management much needed visibility on key parameters like compliance, student related statistics and employee performance.

After initial consultations, Trigent proposed that the administration department become the pilot implementation in order to consolidate its vision. The initial goals involved managing documents, implementing few critical business processes in order to streamline compliance reporting to the state government. Specific activities during the initial phase involved:

- ❑ Conducting face to face discussions with a representative group of stake holders, end users and IT personnel, to help them define the vision leading to the development of a high level architecture and create the overall roadmap

- ❑ Implementing a portal for the administration department which consisted of document libraries, work-flows for document review and approval, search, and other collaboration features such as mySite and Discussion Boards, AD integration for security and enhanced people search

The SharePoint portal implementation process was highly collaborative involving the end users and the IT team. The deployment process was iterative and each iteration phase involved requirements gathering, prototyping, training and deployment.

The administration department benefitted from this project in terms of:

- ❑ Efficient document management, version control and easy to search and find required information
- ❑ Automated document review and approval process using work-flows
- ❑ Faster, more convenient publishing of information
- ❑ Reduced IT support overheads and infrastructure needs

This implementation was then replicated across the other departments of this educational institution during the next few months, beginning with the HR department, then training and the rest. Buy-in and usage by a smaller group helped in easier enterprise wide adoption of Microsoft SharePoint.

Conclusion

A well planned iterative approach to implementation of Microsoft SharePoint can substantially increase user adoption, increase productivity and foster collaboration. On the other hand adhoc implementation by a “install license and forget” process can easily create disillusionment amongst users and make successful implementation difficult thereafter.

The planned process could begin with demonstrating success with one Microsoft SharePoint portal with one group of users. This process could then be replicated in other departments. Replication fosters use of SharePoint best practices and avoids rework and duplication. It also helps plan and manage budgets during implementation, improves productivity, reduces risks and makes the SharePoint implementation successful.

About Trigent Software Inc.

Trigent is a privately held, professional IT services company and a Microsoft Gold Partner with its U.S. headquarters in the greater Boston area and its Indian headquarters in Bangalore. We provide consulting services in various technologies including Microsoft Solutions. Our operating model is to conduct sales, customer relationships and front-end consulting (e.g., business case, requirements, architecture) onsite with our clients and perform the detail design, development, integration, testing and quality assurance offshore at our world class development and support center in Bangalore. We are a SEI CMM Level 4 company and is ISO 9001:2000 TickIT certified organization.

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