

Four P's for User Adoption - Save SharePoint Implementations from Epic Failures!

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Introduction

User adoption is the single biggest challenge that we witness in SharePoint projects. Thought leaders in organizations do realize the value that SharePoint offers, but struggle to demonstrate its value during the rollout. Across the organization the lack of willingness, interest, knowledge, strategy and planning (among others) lead to an implementation that is either partial in its coverage or unsuccessful as a whole as soon as the implementation team hands it off. The first impression, as they say, is a lasting impression. A failed SharePoint implementation can be a big turn-off for users, making subsequent rollout attempts ostensibly harder.

Trigent Software's four part series is an easy guide towards meeting user adoption goals. For the reader's convenience we have identified four main factors that influence any solution implementation- People, Purpose, Performance and Plan- what we call the four P's of user adoption. This series is a compilation of straightforward approaches used to ensure SharePoint implementations are better adopted by organizations with realization of the intended value. We observed the effectiveness of these approaches, incrementally improving the approach over the last 8 years while implementing 100+ projects of varying scale and complexity. We have purposefully resisted using terminology and jargon that make important topics, such as adoption, seem more complicated than they actually are.

Part-1: People - Identify, Align, Empower and Involve Key Stakeholders

Involve users as early as possible: Go out to users, show them the business value, and hear what they have to say

The solution should be the one they requested and can derive benefit, not the one that is forced on them. Before planning the solution, identify the target user group and go out to them, understanding why they require SharePoint. Each person's understanding of SharePoint may be different, so prepare them through proper training sessions. Anticipate issues early on so that they do not deter you from going ahead. Training helps end users from various departments of an organization identify business scenarios where THEY BELIEVE SharePoint can add value and enhance productivity. Users tend to adopt their ideas better than someone else's ideas.

Obtain Executive Support: Go for top-down approach for buy in

Executive support helps in communicating the project objectives to a wider set of stakeholders, ensuring that the right support is made available for project execution. Executives can also wield "sticks" when carrots fail and their directives help in getting the focus back on the project.

One common mistake during project budgeting is to see SharePoint implementation as a simple function of Hardware + Software + Development cost. This is simply not true. A successful implementation involves additional overheads and costs toward training, learning, refinement, tracking etc. - all of which are key components of better adoption and effective rollout. Executives should be aware of these costs and make appropriate allocations in the project budget.

Identify and Groom Champions for SharePoint Adoption: Encourage, Recognize and Reward initiatives

SharePoint is a large-scale collaboration application, which provides a medium for users from various departments to work together efficiently. Identify users who find value in the implementation, who have prior experience of using SharePoint, as well as technically curious users who can assist in moderating site usage and keep the content alive. Encourage and recognize users who participate in creating a successful, thriving application/portal. This requires monitoring, encouragement and reward, which should be the responsibility of the project sponsor.

Social Features Do Help: Enhance productivity with instant collaboration, know what others are talking about

Social interaction depends on the demographics of your user base, but it is a known fact that irrespective of demographics social features are being embraced by all and the usage is increasing. Do not view social interaction as a productivity killer or as an overhead. Enterprise social media such as Yammer can provide instant collaboration such as quick reviews and so forth. When utilized appropriately it can actually increase overall productivity. For example, in one of our implementations, we created a community site to allow users to broadcast issues faced at work and share their experiences. Over a period of time this site evolved into a usable FAQ for the process. A good search capability built over such site provides the knowledge base that is necessary to foster adoption.

Support Mobility: Allow flexibility at workplace, access to applications from anywhere

With increasing acceptance of BYOD (Bring Your Own Device) policies, organizations are making enterprise applications and content available on personal devices. Your SharePoint plan needs to address the requirements of an “impatient” workforce. If you intend to migrate your enterprise content to SharePoint then you have to support mobility early in your implementation. Users would expect to access content from the same device that they use for regular, quick communication. You might fear the security and information governance issues attached with the personal usage of devices, but don't worry; building an acceptable user policy can remove all your qualms.

Part 2: Purpose: Features and Functionalities - Generate a genuine need for use

Move frequently accessed Content to SharePoint: Provide users smarter ways to maintain content

Content lies at the heart of organizations' day-to-day operations. It comes in many shapes and forms. Move the content to SharePoint to create a need for them to visit your "site" and explore the inherent value. It can be the core content used by the target group, or generic forms used on a daily basis such as the expense forms, HR related documents and IT templates. SharePoint's document management capabilities are better than traditional Data Management Systems and can help you better manage content. Add to this the power to search for content and your user community will appreciate the value of SharePoint.

Onboard Your Processes: Utilize the power of BPM

SharePoint has a great BPM engine which can automate any size business processes, e.g., purchase requisition, IT support and HR help-desk. Depending on the maturity of the user group, you can either onboard the whole process or enable the front end in SharePoint through digitization of forms.

Build a Good Enterprise Search: Provide one gateway to your enterprise data

Data discovery is one of the key non-quantifiable activities that add to process overhead. Today, hybrid search sites like Google influence the search behavior of users; the same user experience is expected by users at enterprise level. SharePoint provides functionality – search and Business Connectivity Services (BCS) – to create a universal, homogenous, federated search infrastructure. The objective is to provide a "search center" to find information across all applications in your organization. SharePoint search is one of the most mature enterprise search solutions (acquired from FAST), which has a powerful crawl and index engine returning relevant results for queries. Apply a mixture of techniques such as application search, keyword search, parametric search, statistical search or semantic search based on patterns that best suit your business needs. Most importantly, for search to be effective, be sure to leverage metadata and configure crawls appropriately based on updated content.

Interoperability Helps: Additional functionality in existing application

Make the SharePoint solution part of your existing landscape rather than "yet another application" in your organization. Interoperability between applications has matured and there are several products available in the market to help integrate SharePoint with your core applications such as Outlook, Salesforce, Dynamics CRM, etc. Users find it easier to accept SharePoint when it's just additional functionality in an existing application as compared to a new standalone application. What users don't appreciate is a separate login in yet another application. SharePoint supports a range of Single Sign On (SSO) options and implementing them should be quite straightforward.

Appearance Matters: Enable intuitive navigation and minimize additional effort

Appearance sells and it is true with end users. Use this opportunity to create functional branding which merges appropriate selection of color theme and intuitive layout of the content. The layout should allow users to find what they expect and what they need with minimal additional clicks or scrolls. Have the first level view for the user for items such as summary, recent updates and most popular. Base the views on the frequency of updates - which implies - that you have to do your homework on UI design early in the game. Let the users choose the navigation path based on their interests.

Part-3: Performance - Good Performance is half way to Good Experience

Performance is important: Plan infrastructure based on actual content rather than recommendations

Your users expect under a second response time from websites they access externally. Technically, we understand the various factors that influence this experience and not all factors are in your control. But you can ensure the hardware is adequately sized to support users accessing the site and various other services running on your server. Deploy and schedule various timer jobs appropriately so they do not interfere or reduce the performance when users are accessing the site. Deploy service applications across the available infrastructure based on expected load; monitor performance over time and adjust the split based on actual usage.

Monitor Usage and Patterns: Leverage SharePoint's Usage Reports and Popularity Trends

Utilize built-in analytics for SharePoint to track usages and clicks. Identify site content with low response and address it quickly. Figure out how to improve traffic in those regions. If you are on SharePoint 2013, you can leverage usage reports and popularity trends. These features allow you to view traffic and popular contents at both site and at item levels (page, document etc.)

Part-4: Planning - Plan smart and Achieve better

Plan feature rollout: Implement new features as users mature

Since SharePoint is a feature-rich application with some of the advanced functionality meant for the mature user base can intimidate new users and make adoption even more difficult. Therefore, it is essential to develop a structured feature rollout plan. Get a listing of features from the Microsoft TechNet site and build a plan based on the organization's requirements and users' maturity. Implement new features as the users mature and are ready to learn new functionality. Do not overwhelm users by exposing them to the whole of SharePoint at first sight.

Start Small and Iterate accordingly: Pilot with small groups, take feedbacks, scale it up

Start small. Analyze, develop and satisfy a small group of users before rollout to a larger audience. Avoid a big bang approach. Good references from small successes help to sell the solution externally and internally. Let the corporate grapevine speak well about the SharePoint implementation to remove any mental blocks that thwart users from adopting a new solution. Your solution should not have advanced functionality which will intimidate non-technical users. Focus on usability first, then add additional controls and actions to do some of the work on behalf of end users, e.g., pre-populating values.

Conclusion

User adoption of any software solution cannot be achieved by hope or by coincidence. It is a goal that requires a practical, detailed plan and approach. Successful adoption means success for the project sponsor, the stakeholders and the organization. Think of your SharePoint project as your product launch, your time in the spotlight, your time on Broadway. Effort and planning are key to success. You need to think through the potential issues during software rollout, anticipate all sorts of responses, and have mitigation plans prepared for likely situations.

This is where Trigent can help. Our maturity and years of experience in implementing SharePoint solutions are assimilated in the form of processes and standards utilized in our implementations.

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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