

# Case Study: Developing a SharePoint 2010 Strategy. . . or How Setting It Up and “Getting It Out There” Is Not a Strategy

by Jeff Carr

## Content Strategy

**W**hy does an organization use SharePoint [1]? On the surface this question might seem relatively simple. In all likelihood, if you’re using SharePoint, you are able to list a handful of reasons off the top of your head that include everything from business collaboration and document management to business intelligence and enterprise search. However, if you take a moment to look past the functional capabilities of the product itself and step back to carefully consider exactly why you are employing it, what might the answer be then? If a detailed and specific reason is not immediately apparent this hesitation should be cause for concern.

### The “Technology First” Approach

A common approach for many organizations has been technology-centered design – that is, start with the technology and push off the gathering and documenting of requirements until later, if at all. It is often left up to the folks responsible for the IT function to set up SharePoint and get it out there. As business users slowly become aware of its existence, a site or two are often provided for them to play around with. Initial sites are then followed by a few more and even more after that, and in what seems like the blink of the eye, an assortment of individuals and groups from across the organization have started to turn on various bits of functionality and deploy the product in a haphazard and confusing way.

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SharePoint is a technology designed to remove management of the information environment from IT and place it into the hands of users. The problem lies in the fact that many organizations lack standard ways of managing content, and therefore granting permission and managing the site are often dropped into the lap of a single or small group of uninformed individuals. These people, along with the end users themselves, are for the most part unfamiliar with standard practices in information architecture, content management, taxonomy and metadata.

Before long, the effort required to support and manage growth of the platform dramatically increases as it rapidly evolves into a highly decentralized and ungoverned proliferation of sites, sub-sites, lists and libraries. Before you know it, this organically growing, highly complex and convoluted structure decreases the efficiency of the business users. The lack of consistency and integration leads to a fragmented and frustrating user experience that is compounded by an explosion of content as more business units come online.

An absence of ownership of information architecture leads to numerous issues related to findability. Users are forced to turn to search as a primary form of information seeking, but an absence of standardized content enrichment processes leads to a degradation of the out-of-the-box search experience. Simply put, a lack of strategy, process and governance around content management means that search doesn’t work. Third party add-ons and custom solutions often appear throughout the environment in an effort to overcome these issues, and in the end, what you’re left with is a complex and fragmented data repository with increasing operational costs.

### Seven Key Components of a Successful Strategy

As a result of this situation, organizations are now faced with significant challenges in trying to rein in the proliferation and establish a more

disciplined foundation. Many are faced with a need to re-architect their SharePoint environments in a way that better aggregates the results of the proliferation into a more cohesive experience that aligns with and supports strategic objectives.

If you find yourself in the group considering a move to the newest release of the product, now is an opportune time to pause and be sure that your SharePoint 2010 strategy includes the following seven key components:

**1. Purpose.** Strategic objectives must be identified and clearly defined in conjunction with key executives and stakeholders. These individuals are responsible for articulating the overall vision and ensuring the direction chosen is tied back to organizational goals. Without their buy-in and ongoing support in the form of time, budget and dedicated resource allocation, the chances of success for the platform are dramatically reduced.

Arriving at a common purpose is oftentimes difficult so a recommended approach is to conduct an executive workshop to do the following:

- Identify key descriptors for the system in both the current environment (what is it now) and the future (what it need to be).
- Develop a roadmap based on gaps identified, including quantitative benchmarks from which future successes can be measured.
- Create a Vision statement for SharePoint outlining in detail overall purpose and intention.

**2. Governance.** Governance comprises the policies, processes, standards, models, roles and responsibilities that ensure successful management of the platform across the enterprise. More informally, it's all the things required to make it work, as well as the glue that holds it all together. Because of SharePoint's inherent nature to decentralize away from IT, stronger governance processes are required to make it a success.

An advisory council comprising cross-departmental representation is required, and must include active participation from the executive stakeholders who contributed to development of the overall vision. Subcommittees and working groups for specific areas like technology, information architecture, training and education need to be tasked with

implementation, operation and enforcement, as successful governance requires accountability.

**3. People & Objectives.** It is essential to identify the audiences that have a stake in the environment. It's important to fully understand who they are and what tasks they are required to accomplish. What are the key business processes and how will the technology be designed to support them? Strategy defines your approach to completing the following activities:

- Identifying all the people and groups required to participate in the environment.
- Determining the existing pain points along with potential solutions.
- Developing use cases and user scenarios to capture business processes and common interactions.
- Documenting opportunities for active and passive personalization that also include the serendipitous discovery of information.

**4. Requirements & Analysis.** The formal gathering of requirements, taken directly from users and captured in their own words includes an assessment of the current environment in the form of stakeholder interviews, core team working sessions, end user surveys and heuristic evaluations. These activities combine to identify what's working and what's not along with desired improvements in the form of features and functionality. Requirements must be analyzed, categorized, prioritized and ultimately tied back to the purpose.

**5. Information Architecture.** Information architecture defines the approach to two key areas: information organization and access. Prior to implementation of site structures, navigational schemes and search interfaces, it's crucial that you develop comprehensive content models, which require clear understanding of the types and volume of content that exist. To do so you must define methods for completing the following:

- Content audits and inventories that identify volume, ownership, responsibility and overall scope of the problem.
- Identification of key global content types that have organizational value along with standard definitions for each. For example, defining and obtaining acceptance with respect to what constitutes a "procedure."

- Documentation of information lifecycles that address all aspects of management from creation to disposition.
- Development of metadata schemas, plan groups and term sets as a basis for content enrichment, including the definition of a standard set of fields applied to all documents.
- Design of workflow to automate all or portions of key business processes.
- Design of standardized publishing models outlining levels of organizational autonomy (centralization vs. decentralization).
- Establishment of consistent naming conventions along with a set of editorial guidelines.
- Site-map development to determine the logical hierarchy of site collections, sub-sites, lists and libraries.

Performing this analysis sets the foundation for the design of wireframes illustrating innovative access mechanisms that are consistent and standardized and provide a multi-faceted approach to information findability.

- 6. Technology.** Technological considerations include coverage for the installation, configuration and maintenance of both hardware and software along with application integration between the SharePoint environment and other enterprise systems. They also include identification of third-party add-ons and custom development necessary to meet high priority requirements. The technology attribute of the overall strategy is, for the most part, the only piece that should be fully owned by IT.
- 7. Maintenance & Enhancement.** How will you address improvements to the environment as business needs evolve? To do so, it will be important to ensure the availability of metrics from which benchmarks and end user satisfaction can be measured. Metrics, which must be tied back to the overall purpose, can be captured in the form of search and web

analytics as well as through periodic qualitative measures indicating user satisfaction. New initiatives identified by business users need also relate back to the strategic objectives.

### Pulling It All Together

The formal definition of an overall strategy for SharePoint that begins with an executive vision and proceeds to outline a clear set of business goals is the best method for enabling achievement of long-term objectives. Governance is a fundamental element of success and often finds its biggest challenges in changes to organizational culture. While difficult, this transformation is needed for growth. A cultural evolution will be required but can be made easier through strategies that address the socialization of business objectives as well as communication and training initiatives that assist with influencing user adoption. Without a strong governance model, even the best-designed environments are sure to fail.

A well-designed SharePoint implementation will be constructed from the perspective of the end user and will streamline business processes by providing a place for teams to perform their work more effectively, enabling the capture and dissemination of organizational memory and ultimately connecting people with the right content (or the right person) in the right context at the right time.

Without the development of a formal strategy in each of the areas identified, future opportunities will be limited as a result of the lack of the foundational capabilities that have not been established over time. Inevitably, starting with the technology itself will result in longer-term challenges and, potentially, failure from a lack of user adoption. Without careful planning your SharePoint environment will end up evolving into nothing more than a complex file share on the web, but one that is significantly more difficult to use and much more costly to maintain than it would have been without SharePoint. ■

### Resource Cited in the Article

[1] *Sharepoint*: <http://sharepoint.microsoft.com/en-us/Pages/default.aspx>.