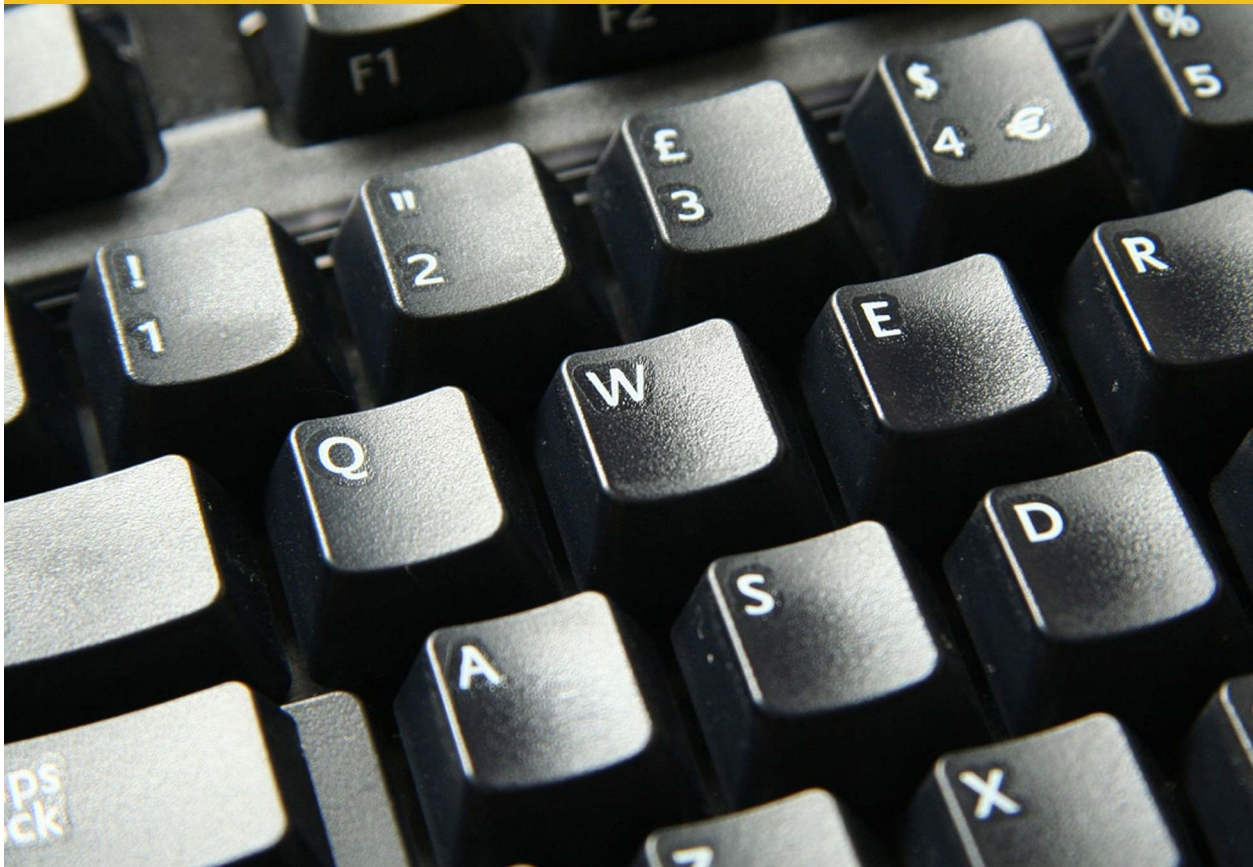


# A Manager's Guide to SharePoint

*Exploring the Non-Technical Factors That Drive Success*



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## Introduction

A great deal has been written about the technical aspects of SharePoint. While this body of knowledge is critically important to the SharePoint ecosystem, the non-technical aspects of deploying and maintaining the platform in large organizations are somewhat underrepresented in the literature. This white paper was written to help address this gap; our goal in writing it was to provide insights, advice, best practices, and real-world experience to help organizations understand and address these non-technical issues.

The intended audience for this white paper includes executives and managers who have been tasked with deploying and maintaining SharePoint in their organizations. Technical professionals may also be interested in the content but will not find any code snippets, configuration settings, etc. A nominal background in SharePoint (just from an end-user perspective) will be helpful to the reader but isn't strictly required. However, if you have not already done so we would encourage you to spend an hour or two reviewing a SharePoint demo or trying out a hosted site. Microsoft has a number of online resources that may be helpful:

**A flash-based demo is available here:**

<http://office.microsoft.com/en-us/sharepointserver/HA101672721033.aspx>

**Desktop training materials are available here:**

<http://office.microsoft.com/en-us/sharepointserver/HA102488011033.aspx?pid=CL100796281033>

**A 180-day trial version is available here:**

<http://www.microsoft.com/downloads/details.aspx?FamilyId=2E6E5A9C-EBF6-4F7F-8467-F4DE6BD6B831&displaylang=en>

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## Why SharePoint?

This section of the document provides an overview of the SharePoint platform for people who may not be familiar with it. If you're already a SharePoint user, or if you have some familiarity with the product, feel free to skip forward to the next section on business considerations.

- **SharePoint is a server-based product that users work with in a browser**
- **There are different editions with different capabilities**
- **SharePoint can be used to build a very robust intranet with no custom development**
- **SharePoint brings a wealth of new features and empowers users to manage content**
- **SharePoint can help make users and organizations more efficient**
- **The platform has been heavily invested in by Microsoft and its partners**

## What is it?

The term "SharePoint" encompasses a family of enterprise server products from Microsoft. There are several editions of SharePoint, from the free Windows SharePoint Services (aka "WSS") all the way up to Microsoft Office SharePoint Server 2007 Enterprise Edition (aka "MOSS"). There are a number of differences between the various editions of the product which Microsoft outlines here:

<http://sharepoint.microsoft.com/product/details/Pages/default.aspx>

Capabilities	Windows SharePoint Services 3.0	Office SharePoint Server 2007 Standard CAL	Office SharePoint Server 2007 Enterprise CAL	Office SharePoint Server for Internet Sites
Collaboration	✓	✓	✓	✓
Portals		✓	✓	✓
Enterprise Search		✓	✓	✓
Enterprise Content Management		✓	✓	✓
Business Process and Forms			✓	✓
Business Intelligence			✓	✓
Licensed for Internet/Extranet	✓	✓	✓	✓

1

In this white paper we're going to focus on Office SharePoint Server Standard Edition and Enterprise Edition as these are the versions most commonly deployed by medium- and large-size organizations.

<sup>1</sup> From Microsoft's SharePoint site at <http://sharepoint.microsoft.com/product/details/Pages/default.aspx>

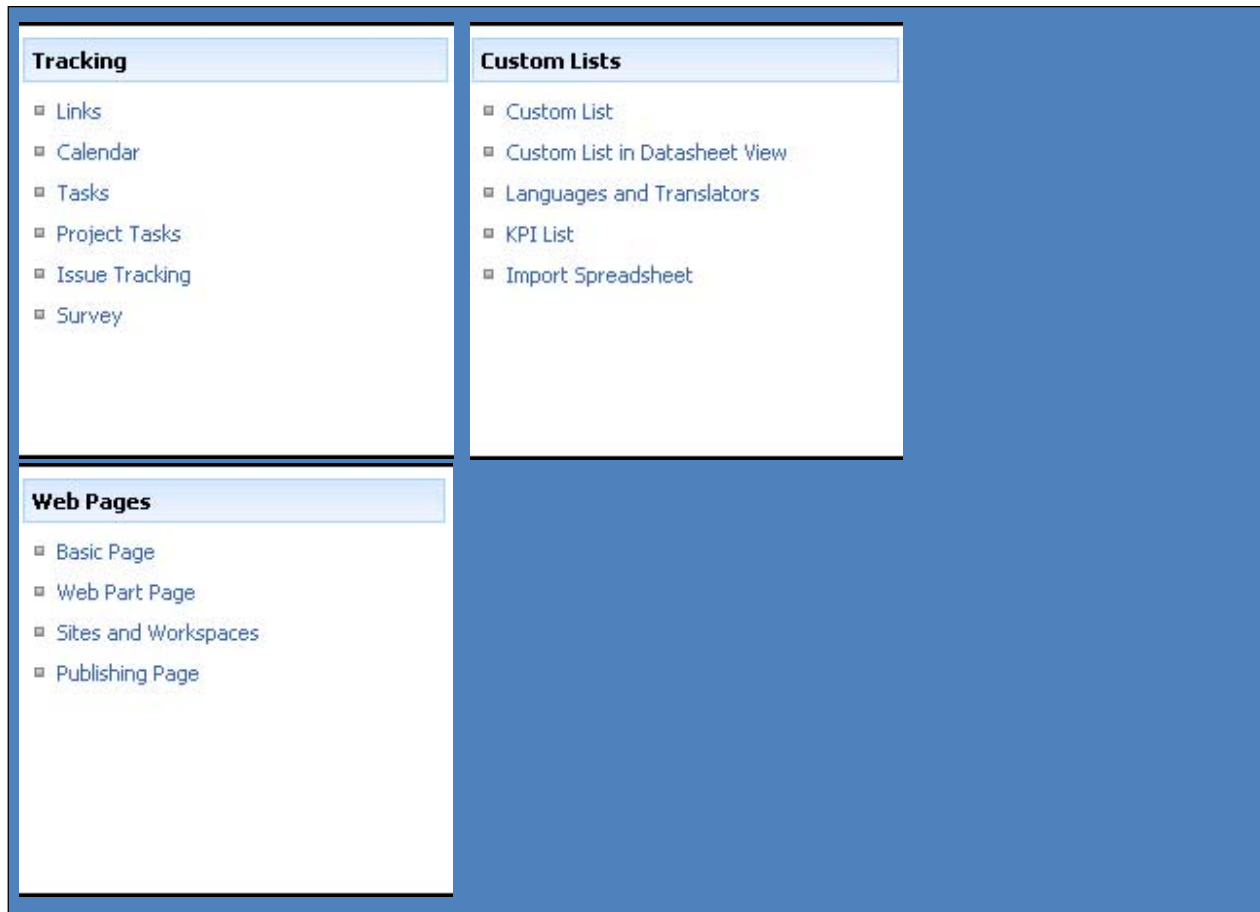
Much of the commentary may also apply to WSS and SharePoint Server for Internet Sites, but generally speaking when we refer to "SharePoint" we're talking about the Standard or Enterprise edition.

With that out of the way, what is SharePoint? The shortest, simplest explanation is that SharePoint is a "web portal in a box." While that may not be entirely technically accurate it's a reasonable starting point for the uninitiated. So what do we mean by this? SharePoint, once installed and configured, allows an organization to quickly create (often internal) web portals with a few simple clicks. These sites can include features such as:

- Document libraries
- Wikis
- Blogs
- Business intelligence tools
- Shared calendars
- Issue logs
- Task lists
- Announcements
- Custom lists
- Point-and-click workflow solutions
- RSS feeds
- Email alerts
- And much, much more...

*Screenshot of options on SharePoint's "Create" screen*





SharePoint can be used as an internet-facing web content management platform; it can also be used just for enterprise search, as a custom application platform, or as a document management system. When users are new to SharePoint there can be quite a bit of confusion about what it is, largely due to the wide variety of features in the product as well as the variety of ways different organizations use it. For better or worse, the best way to understand what SharePoint is and how your organization might benefit is to use it. If you skipped the introduction, go back and look at the links provided there; if you invest a couple of hours with the demos and training material you'll have a much better understanding of what SharePoint is. Your IT staff can deploy a single, stand-alone SharePoint server in an afternoon that can be used to try out the system.

### How is it different?

So the obvious question is: "How is SharePoint any different than what we've had in the past?" Another short, simple answer: you don't have to rely on your web developers, web editors, or content specialists to start getting data into SharePoint. Further, by using complementary tools like InfoPath and SharePoint Designer very compelling business applications can be created without writing custom .Net code.

Corporate intranets have been around for years now; since the late 1990's most large organizations have had some sort of intranet in place. Unfortunately most of these intranets have not delivered on their initial promise, often due to one or more of the following reasons:

- End users can't directly add or modify content on the site
- Search doesn't work very well
- Content changes have to go through a slow publication process
- Making changes to the intranet requires expensive developer time
- Adding new features entails writing new web applications from scratch
- The site doesn't integrate well with other systems or applications
- Applying heterogeneous security permissions to different content is difficult
- They are more of a one-way publishing model than a two-way conversation

As a result, intranets have been useful for publishing certain types of information that don't change frequently (e.g. company holiday schedules, policies and procedures, contact information, executive announcements) but have not been as useful for more dynamic content and collaboration. Additionally, information on first-generation intranet sites tends to get out of date and pages become "stale" as the people who own the information are not the same ones who can update the pages.

Enter SharePoint. SharePoint sites allow end users to add content simply by pointing and clicking in a familiar web interface. This means that business users can maintain libraries of files, share calendars, create web content, collaborate in wikis, publish blogs, and administer web sites without ever having to request a developer's time. With some basic training, users become as comfortable with SharePoint as they are with file shares, email, Outlook Public Folders, etc. In addition, SharePoint can be extended for use as an enterprise search platform (it can search file shares, other sites, public folders, etc.) and to create collaborative work spaces. Users can interact with the product through the browser, of course, and also directly through MS Office 2007 applications<sup>2</sup>.

### Why should organizations care?

Organizations should care about SharePoint because it can help make them more efficient. Users spend too much time searching for information, re-creating content, organizing data, and emailing each other. SharePoint can help alleviate this information inefficiency by providing users with a new paradigm for collaborating and interacting. However, proper planning, change management, and governance are needed to help ensure the efficiency gains -- thus the need for white papers like this! Also, with the growing interest in Web 2.0 technologies, SharePoint gives organizations a great way to deploy a wide range of these tools in one consolidated platform that integrates well with their existing systems.

### Where is it going?

SharePoint has been an incredibly popular platform for medium- and large-size organizations that run Microsoft applications. As this is written (September 2009) the current version is SharePoint 2007 and

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<sup>2</sup> MS Office 2003 also interoperates with SharePoint 2007 but the functionality is limited

SharePoint 2010 is expected in the near future. All indications are that the application will become even more widely adopted than it is today, and Microsoft and their partners are making very large investments in the platform. As a result, organizations should not be concerned that the product is going away any time in the foreseeable future.

Other collaboration platforms have gained acceptance in many organizations, including a variety of wiki-based systems, IBM Lotus/Domino solutions, and other enterprise portals. However, given the near ubiquity of Microsoft Office and the broad deployments of Active Directory, SQL Server, Microsoft Exchange, etc. it is likely that SharePoint will continue to maintain and grow its market share.

### Why not SharePoint?

While SharePoint offers a great deal to a wide variety of organizations it's not for everyone. Here are some reasons why your organization might not want to deploy it:

- SharePoint is complex and requires skilled administrators (and developers, if you're customizing) to maintain it. If your organization is small, or already pressed for IT support, you might consider a hosted option or a simpler internal solution. If you're deploying it internally you may wish to start with a small WSS site before deploying the Enterprise edition.
- SharePoint is entirely based on the Microsoft technology stack. If you work for an organization whose IT operations are largely based on Unix, Linux, Oracle, Java, NDS, mainframe systems, etc. the cost of deployment and ongoing operations may be higher due to training costs, inability to leverage existing licensed platforms (e.g. SQL Server, System Center Data Protection Manager), and possibilities for redundant systems.
- SharePoint can be expensive, especially if you intend to use it on the internet for a potentially unlimited number of users. If you're on a tight budget or if you're considering SharePoint as your internet solution, you'll want to balance the cost with what your organization needs.

That said, we highly recommend taking a look at the trial software and possibly signing up for a hosted SharePoint site so you can get a feel for the application's capabilities.

## Initial Business Considerations

This section of the document outlines the important business considerations that need to be weighed as part of a SharePoint initiative.

- **SharePoint allows users to work differently**
- **Document libraries replace file shares and offer versioning, check-out, custom meta-data**
- **Enterprise search allows users to search across the enterprise**
- **Users can generate and manage online web content**
- **SharePoint bring a number of Web 2.0 features in one platform**
- **Mobility features are built in**
- **A business case and ROI should be prepared at the beginning of the initiative**
- **Success criteria should be measurable**

## Paradigm Shifts

SharePoint brings with it a number of paradigm shifts; while this is largely a good thing it's important to understand that this has impacts on people and existing processes and will require an investment in organizational change management (see that section below for details). Some of the biggest changes that SharePoint brings are listed here.

### Document management

In most organizations, documents are stored on users' local machines and shared file servers. This model has served us well for years now, but has a number of shortcomings. A few organizations have dedicated document management solutions in place (e.g. Documentum, FileNet) but these tend to be very complex and are often challenging for end users. SharePoint offers a very balanced approach to document management via one of its most widely used features: Document Libraries.

Document Libraries are like online file shares, but with important improvements:

- **Versioning:** with versioning turned on, each time a document is edited and saved a new version is created. This allows users to revert to older versions if a mistake was discovered, as well as comparing changes between versions and seeing who updated the document and when.
- **Check-in/out:** this allows users to "check out" documents so that no one else can modify them. Other users can read the documents or save local copies, but cannot modify a file while it's checked out to someone else.
- **Flexible metadata:** metadata (i.e. "data about data") can be added to document libraries very easily. File servers usually capture basic metadata, like the modified date or who created the file,

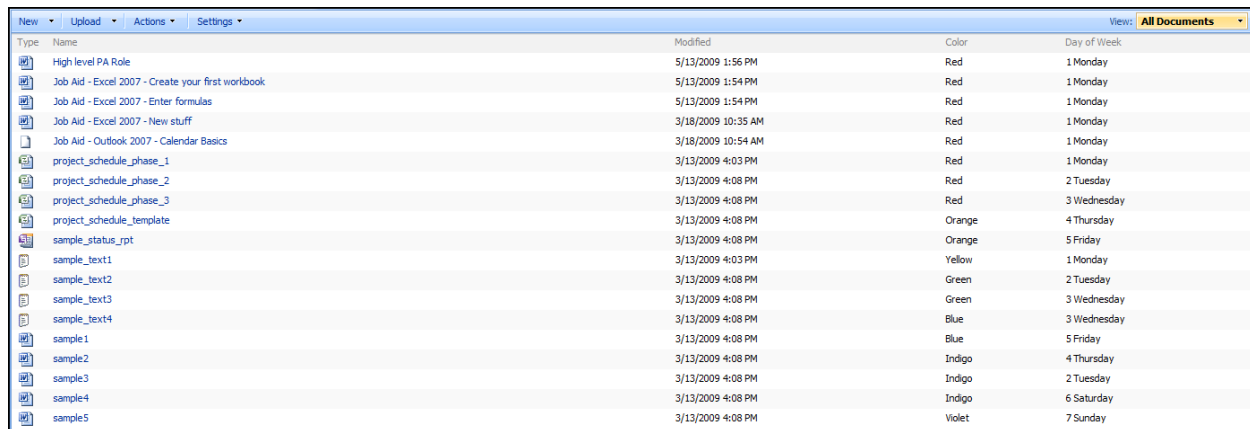
but SharePoint allows users to create arbitrary metadata columns, like “department” or “client” or “project phase” which become searchable and sort-able.<sup>3</sup>

- Flexible views: users can create views of lists and libraries that are sorted, filtered, and grouped by metadata elements. In simple terms, this helps us get away from the old tree-based model of file folders and into a more flexible data-driven approach.
- Information management policies: the organization can specify retention periods for content, making it possible to automatically delete content after a specified period of time.

### So why is this important for the executive or manager to consider?

- As users move all of this content off the file servers and into SharePoint you need your IT team to articulate the changing costs of storage; sometimes this cost goes up and sometimes it goes down depending on your existing infrastructure
- Your users are going to need training to understand how to work in the new world of SharePoint. Otherwise they will simply recreate the fileserver structure on your portal, missing the benefits and eliminating a potential efficiency gain.
- This feature makes it much easier for teams to collaborate on projects and for users to find the information they're looking for. This increased internal efficiency should factor into your ROI

### Example: one Document Library with multiple views configured



Type	Name	Modified	Color	Day of Week
Word Document	High level PA Role	5/13/2009 1:56 PM	Red	1 Monday
Word Document	Job Aid - Excel 2007 - Create your first workbook	5/13/2009 1:54 PM	Red	1 Monday
Word Document	Job Aid - Excel 2007 - Enter formulas	5/13/2009 1:54 PM	Red	1 Monday
Word Document	Job Aid - Excel 2007 - New stuff	3/18/2009 10:35 AM	Red	1 Monday
Outlook	Job Aid - Outlook 2007 - Calendar Basics	3/18/2009 10:54 AM	Red	1 Monday
Project Schedule	project_schedule_phase_1	3/13/2009 4:03 PM	Red	1 Monday
Project Schedule	project_schedule_phase_2	3/13/2009 4:08 PM	Red	2 Tuesday
Project Schedule	project_schedule_phase_3	3/13/2009 4:08 PM	Red	3 Wednesday
Project Schedule	project_schedule_template	3/13/2009 4:08 PM	Orange	4 Thursday
Sample	sample_status_rpt	3/13/2009 4:08 PM	Orange	5 Friday
Text	sample_text1	3/13/2009 4:03 PM	Yellow	1 Monday
Text	sample_text2	3/13/2009 4:08 PM	Green	2 Tuesday
Text	sample_text3	3/13/2009 4:08 PM	Green	3 Wednesday
Text	sample_text4	3/13/2009 4:08 PM	Blue	3 Wednesday
Sample	sample1	3/13/2009 4:08 PM	Blue	5 Friday
Sample	sample2	3/13/2009 4:08 PM	Indigo	4 Thursday
Sample	sample3	3/13/2009 4:08 PM	Indigo	2 Tuesday
Sample	sample4	3/13/2009 4:08 PM	Indigo	6 Saturday
Sample	sample5	3/13/2009 4:08 PM	Violet	7 Sunday

<sup>3</sup> Note that metadata can be required or optional; by specifying required metadata fields you can substantially improve your organization's ability to track compliance-related data across the enterprise's content.

New Upload Actions Settings					View: Group by Color
Type	Name	Modified	Color	Day of Week	
<b>Color: Blue (2)</b>					
	sample_text4	3/13/2009 4:08 PM	Blue	3 Wednesday	
	sample1	3/13/2009 4:08 PM	Blue	5 Friday	
<b>Color: Green (2)</b>					
	sample_text2	3/13/2009 4:08 PM	Green	2 Tuesday	
	sample_text3	3/13/2009 4:08 PM	Green	3 Wednesday	
<b>Color: Indigo (3)</b>					
	sample2	3/13/2009 4:08 PM	Indigo	4 Thursday	
	sample3	3/13/2009 4:08 PM	Indigo	2 Tuesday	
	sample4	3/13/2009 4:08 PM	Indigo	6 Saturday	
<b>Color: Orange (2)</b>					
	project_schedule_template	3/13/2009 4:08 PM	Orange	4 Thursday	
	sample_status_rpt	3/13/2009 4:08 PM	Orange	5 Friday	
<b>Color: Red (8)</b>					
	High level PA Role	5/13/2009 1:56 PM	Red	1 Monday	
	Job Aid - Excel 2007 - Create your first workbook	5/13/2009 1:54 PM	Red	1 Monday	
	Job Aid - Excel 2007 - Enter formulas	5/13/2009 1:54 PM	Red	1 Monday	
	Job Aid - Excel 2007 - New stuff	3/18/2009 10:35 AM	Red	1 Monday	
	Job Aid - Outlook 2007 - Calendar Basics	3/18/2009 10:54 AM	Red	1 Monday	
	project_schedule_phase_1	3/13/2009 4:03 PM	Red	1 Monday	
	project_schedule_phase_2	3/13/2009 4:08 PM	Red	2 Tuesday	
	project_schedule_phase_3	3/13/2009 4:08 PM	Red	3 Wednesday	
<b>Color: Violet (1)</b>					
	sample5	3/13/2009 4:08 PM	Violet	7 Sunday	
<b>Color: Yellow (1)</b>					
	sample_text1	3/13/2009 4:03 PM	Yellow	1 Monday	

### Enterprise search

Enterprise search is one of the most interesting developments in recent years. Until recently, most organizations had no way of searching content on their internal networks. Users' data existed on file servers, in public folders, on intranets, etc. but very little of it was searchable. While we've all grown used to the ability to search the web, there was no good solution for searching content internal to an organization. With the proliferation of storage and user-generated content the need for internal search grows greater and greater each year.

SharePoint has a robust internal search engine that crawls and indexes the content on the SharePoint site; this is taken for granted in an enterprise portal application. Fortunately, however, it is easy to "point" SharePoint's search engine at other content and have that crawled and indexed as well. For example, SharePoint can search file servers, Exchange Public Folders, corporate web sites, and more. This allows organizations to deploy an enterprise search platform "for free" as a consequence of deploying SharePoint.

### So why is this important for the executive or manager to consider?

- Search makes it much easier to find things; this efficiency gain can factor into your ROI calculations
- Search tends to surface content that people didn't realize was there. At least one of your users will try searching for "layoff coming" or "CEO's salary." You'll want your security team to make sure permissions are correctly configured on the file servers before you start making them searchable
- SharePoint's search capabilities mean you don't need to invest in a separate search tool (e.g. the Google Search Appliance)

### User-generated web content

While many organizations have had intranets for the past decade, most have not had the capability to allow end users to update pages on the intranet. Control is generally centralized within a web team, who are responsible for editing and publishing content. This model changes with SharePoint; users are able to easily create content and make it available online. In fact, everything that gets posted to SharePoint becomes an online asset, whether it's a downloadable file, web page content, a calendar entry, or an announcement. This pushes the responsibility for content updates "down" to the users who own and understand the content, making the intranet much more relevant and current. An important note on this topic: approval workflows can optionally be assigned to content, which ensures that appropriate reviews occur before sensitive content is published to a site.

### So why is this important for the executive or manager to consider?

- You may not need as many people supporting the web content as you did before; the intranet editors' jobs may end up being delegated to the end users who own the content in the first place
- Users and their managers need to be aware of compliance rules, regulations, corporate policies, etc. that impact shared web content
- You may want to set up content approval processes so information is reviewed before it is published to the entire organization

### "Web 2.0 in a Box"

"Web 2.0" has become a popular buzz-word online and many IT executives have been asked to start deploying these new tools internally. This can create challenges, though, as many of the tools were never built to be used internally by organizations; most do not support corporate standards such as Active Directory, and most do not interoperate well out-of-the-box.

SharePoint offers a wide variety of Web 2.0 technologies in a single, cohesive package that integrates easily into typical corporate (or large organization) environments. Such features include:

- Blogs
- Wikis
- Social networking
- Personal sites
- User-generated content

While many might argue that SharePoint is not a Web 2.0 platform, many large organizations will get the features they need along with the security, control, and integration they expect from an enterprise platform.

### **So why is this important for the executive or manager to consider?**

- SharePoint gives you a single, simple answer to the many voices calling for “more Web 2.0”
- It's much easier to deploy and maintain a single system than it is to deploy and maintain multiple disparate systems
- You may be able to consolidate functions and eliminate existing platforms; if so this should be captured in your ROI calculations.

### **Mobility**

Mobile access to data and mobile applications are becoming more and more important to end users and organizations with dispersed teams. SharePoint offers out-of-the-box mobile views of content that are suitable for use on Blackberries, Windows mobile devices, etc.

### **So why is this important for the executive or manager to consider?**

- SharePoint can make it easier to mobilize your data; this may allow you to avoid other parallel project initiatives and related costs
- Mobile data must be secured; it's important to consider what information should be allowed onto mobile devices and how those devices should be configured

## **Building a business case**

Before embarking on a SharePoint deployment initiative, organizations should carefully consider the pros, cons, and costs and incorporate these into a coherent business case. Without a well-constructed business case it can be difficult for project teams to articulate their goals and measuring success becomes almost impossible. Given the time and expense most large organizations go through when deploying a new enterprise platform, spending the time up front to develop a business case is well worth it.

### **Don't do “technology for technology's sake”**

A word of caution, especially for the technologists who may be reading this: don't fall into the trap of doing technology for technology's sake. There are many organizations whose IT departments talked them into a SharePoint deployment, only to discover (after spending a lot of time and money) that there was no real business justification for the initiative and now the end users are confused about what SharePoint is and why they should use it. Don't let this happen to your organization. Have clearly defined reasons for deploying SharePoint and be sure the stakeholders and project team are completely clear on what those are.

### **Specific goals**

Identifying “SMART” goals is a great way to ensure you're identifying real value in the business case. SMART goals are:

- **Specific:** the goal must be as specific as possible (e.g. deploy an enterprise search platform that's capable of searching our existing file servers)
- **Measurable:** it must be measurable / quantifiable (e.g. reduce the amount of time it takes to get new information on the website by 50%)
- **Attainable:** it has to be something that can reasonably be accomplished (e.g. migrate 3 departments onto SharePoint over the next 90 days)
- **Relevant:** it has to be relevant to the organization and its larger strategies (e.g. eliminate \$250K in redundant systems in support of the \$2M cost reduction initiative)
- **Time-bounded:** each goal should have a reasonable deadline (e.g. complete the first project phase within 180 days of the kick-off meeting)

## Return on investment (ROI)

Developing ROIs for internal technology projects can be challenging but if it is something your organization is capable of it will make a much stronger business case. While it's impossible for us to know what your investments or returns will be, here are some of the major factors that should be included in most organizations' ROI calculations:

### Investment: Technology

Deploying SharePoint will require an investment in technology. Here are the major expense items that usually appear:

- **Software costs**
  - **SharePoint licenses:** cost varies based on edition
  - **SQL Server licenses:** many organizations are already sufficiently licensed
  - **Windows Server licenses:** for the servers that will run SharePoint
  - **Office 2007 licenses:** if you're upgrading the desktops to stay in sync
- **Hardware costs**
  - **Server hardware:** for the SharePoint farm(s) and potentially for new SQL Server instances. *[Note: most organizations will want separate production and development environments, and many also have testing and staging environments. Be sure to account for all of these]*
  - **Storage costs:** to cover the costs of expanding RAID arrays, the SAN infrastructure, etc. Many mid- to large-size organizations have complex storage architectures that will need to change to accommodate SharePoint content.
  - **WAN network hardware,** if you need to increase the bandwidth to remote sites this may require upgrading WAN hardware
- **Other infrastructure costs**
  - **Bandwidth upgrades:** remote sites may require additional bandwidth to accommodate SharePoint traffic

- **Per-server licensed solutions:** monitoring solutions, anti-virus packages, reporting tools, etc. that require per-server licensing may need to be upgraded for the additional servers

### Investment: Project Costs

One of the largest up-front costs for any type of enterprise deployment like this is the initial project effort. **A detailed work breakdown structure must be developed that accurately depicts the work effort of the project team.** A typical SharePoint deployment program for a large organization can have as many as a dozen core team members and many more ancillary participants over the life of the initiative.

Capturing the costs of these investments as part of the business case will present an accurate view of the real costs involved in deploying SharePoint.

### Investment: People

Simply investing in the technology and deploying it won't lead to a truly successful implementation. An investment is also going to be required for the various roles involved in SharePoint:

- SharePoint administrator(s) will need to be trained or hired
- SharePoint developer(s) will need to be trained or hired, if you plan to customize
- Help Desk personnel will require training
- Web designers may need to be trained or hired if you're going to brand the site
- Training materials will need to be purchased or developed; if you have an internal training team the instructors will need to be trained and prepare course materials
- End users will need training

### Expected returns

Like many other internal productivity platforms, capturing the expected returns from a SharePoint initiative can be difficult. The easiest items to capture are the following:

- Cost savings through platform consolidation
- Cost avoidance by eliminating multiple system deployments to achieve the same functionality

However, it's not unreasonable to address the following types of returns, although in many cases the cost of measuring them can outweigh the potential savings:

- Less time spent searching for content
- Less time spent managing email
- Less time spent marshalling content through approval processes to get online
- Automated workflows replacing manual or paper processes

## Measuring success

Like any other enterprise initiative, it is important to measure the success of your SharePoint deployment. Each organization's goals are different, but all organizations can benefit from identifying

clear, quantifiable goals that can be measured over time to ensure the SharePoint initiative is achieving its goals.

# Technology Platform for the Non-Technical

This section of the document describes the technology platform and introduces important technical considerations. We have attempted to present this information using as much non-technical language as possible without being vague or inaccurate.

- **Technical readiness is a prerequisite for a successful deployment**
- **Human resources and technology resources should be in place from the beginning**
- **Consider enterprise architecture, infrastructure, and customization**
- **Platform migrations can be a primary driver of SharePoint initiatives**
- **Plan for operation and administration resources**
- **Ensure SharePoint is governed by a change management process**

## Technical readiness

Organizations need to be in a state of technical readiness when launching a SharePoint initiative. This means that resources, both human and technological, are in place and prepared for the new platform to be introduced.

### Human resources in Information Technology

The following IT roles should be established as part of the SharePoint initiative; a single person may certainly fulfill more than one role, but it is important that each of these roles is represented.

Roles	Responsibilities
Business Owner / Sponsor	This person is usually an executive-level sponsor with budgetary authority to pay for the initial project. Usually represents the business and is primarily interested in the ROI potential of the platform.
Technical Sponsor	This person is usually an executive-level technology manager who manages the technical teams that will deploy and maintain SharePoint
SharePoint Administrator(s)	The SharePoint Administrator will be responsible for the day-to-day administration of the platform, as well as all system upgrades, major configuration changes, etc.
Backup / Storage Administrator	This is the person who is already responsible for enterprise backups, and often storage management (in most large organizations this usually a team rather than an individual). It is important to involve this person intimately, as backup/restore operations are both critical to the enterprise and challengingly complex
Site Collection Administrator(s)	These are the people who will administer the various high-level collections of sites once the platform is deployed. In corporate environments, each division may have one or more site collections specific to their users and data; the Site Collection

	Administrator(s) would manage the system at this level and report to the SharePoint Administrator for technical purposes.
Site Administrator(s)	Site Administrators are often members of business departments and/or teams; usually these are "power-users" who are interested in taking on administrative duties for their department's SharePoint site(s)
SharePoint Developer(s)	The SharePoint Developer(s) will write custom .Net code to enhance and modify the base SharePoint platform. While many organizations choose to create custom-code solutions for their SharePoint portals, there are strong arguments to be made for limiting customization.
Help Desk Resource(s)	End users will rely on the Help Desk and desk-side support resources, so this team needs to be involved in the SharePoint project and properly trained and prepared
Technical Trainer(s)	The training team (or your training vendor) will need to create and/or deliver training materials to the end user community. They should be involved in the project as soon as the basic use cases and end-user audiences are identified.

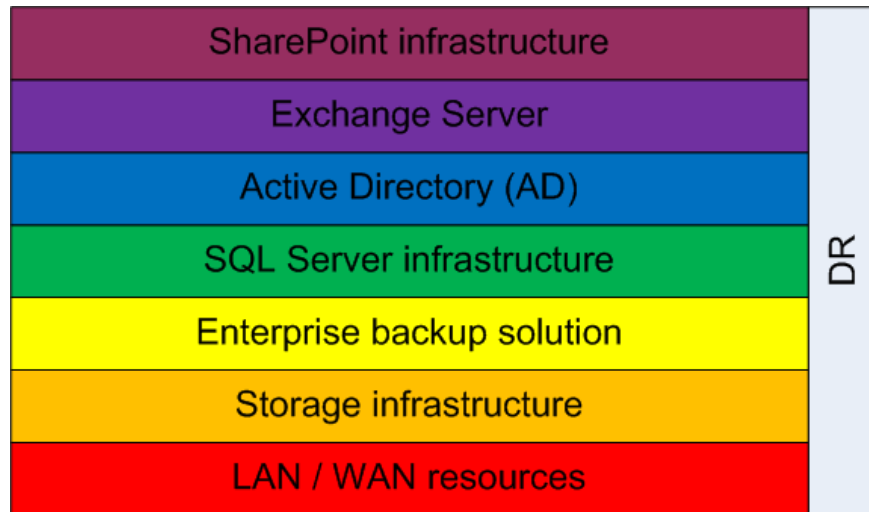
Please note that for the majority of the roles listed above it is a very good idea to identify one or more backup resources to provide coverage for vacations, employee turnover, and cross-training purposes.

### Technology resources

The following technology resources should already exist in your organization prior to deploying SharePoint. While it's certainly possible to deploy these technologies as part of a SharePoint initiative, the scope and complexity of the project can quickly become overwhelming for the IT resources if too much is attempted at once.

- **LAN / WAN infrastructure:** a robust Local Area Network (LAN) and Wide Area Network (WAN) is a foundational element of the SharePoint infrastructure
- **Storage infrastructure:** a scalable, dependable storage infrastructure (e.g. SAN) should be in place and is also a foundational element of the SharePoint infrastructure (not required for smaller environments or smaller deployments)
- **Enterprise backup solution:** as data moves into SharePoint it is imperative that the system is backed up on a very frequent basis (at least daily). Microsoft offers a product called Data Protection Manager that's best-of-breed for SharePoint backups and other enterprise systems
- **SQL Server:** this is Microsoft's enterprise database platform. Most organizations will want to deploy this in a clustered configuration (i.e. more than one server) to help ensure SharePoint is always available.
- **Active Directory (AD):** this is Microsoft's directory service and is what you interact with when you log into your PC in the morning. SharePoint uses Active Directory to determine who a user is and what he or she can access.

- **Exchange Server:** this is Microsoft's enterprise email platform. There are a variety of ways SharePoint interoperates with email, calendars, and Public Folders, so having Exchange in place first is helpful.
- **Disaster recovery (RD) solution:** having a DR site in place is also a very important consideration in case your organization experiences a major data-loss event. If SharePoint is going to be widely used in the organization it should be represented in the DR environment



## Deployment

In planning for a SharePoint deployment the following technology areas should be addressed up front.

### Enterprise Architecture Considerations

Most large organizations have one or more people, if not an entire team, that focus on “enterprise architecture”, or how all the various components of IT in the enterprise fit together. Since SharePoint can quickly become a central application for users' daily work, the enterprise architect(s) need to be involved from the beginning of the project to ensure SharePoint is deployed in a manner consistent with the established technical standards and policies.

### Infrastructure

The discussion of SharePoint and infrastructure can get quite complex and is beyond the scope of this document. However, the following are areas that will need to be addressed as part of the SharePoint deployment:

- **Server resources:** whether physical or virtual, SharePoint will require a multi-server setup for each farm environment your organization deploys. A very common scenario is a 4-server configuration connected to a clustered database. If your organization maintains separate development, test, staging, and production environments you'll need to plan for 16 servers plus the database instances.
- **Storage resources:** many medium- to large-size organizations have centralized their data storage on Storage Area Networks (SANs). Storage resources, i.e. hard disk space, tends to be

expensive and in high demand. A projection of the initial storage requirements, plus an estimate of storage growth over the next 12-18 months should be completed and provided to the storage team. Additionally, the enterprise backup team will need to ensure sufficient space exists in the backup infrastructure to handle SharePoint data.

- **Network resources:** if all the users will be located on the same Local Area Network (LAN), i.e. everyone is in the same location, the installed network hardware should be sufficient to handle the traffic and no major changes should be seen. However, if remote offices migrate from using local file servers (i.e. servers co-located in the remote offices) to a centralized SharePoint platform the Wide Area Network (WAN) traffic may increase dramatically. Plan for bandwidth and network hardware resources accordingly.

A high-level comprehensive infrastructure design should be completed towards the beginning of the initiative for budgetary purposes if nothing else.

### Custom Applications

SharePoint is based on Microsoft's popular .Net framework and is completely customizable and extensible. Many organizations employ .Net developers to build custom solutions and extensions to the core product. However, we find it's often best for organizations to start with an out-of-the-box implementation first and then consider customization. When thinking about customizations you should consider the following<sup>4</sup>:

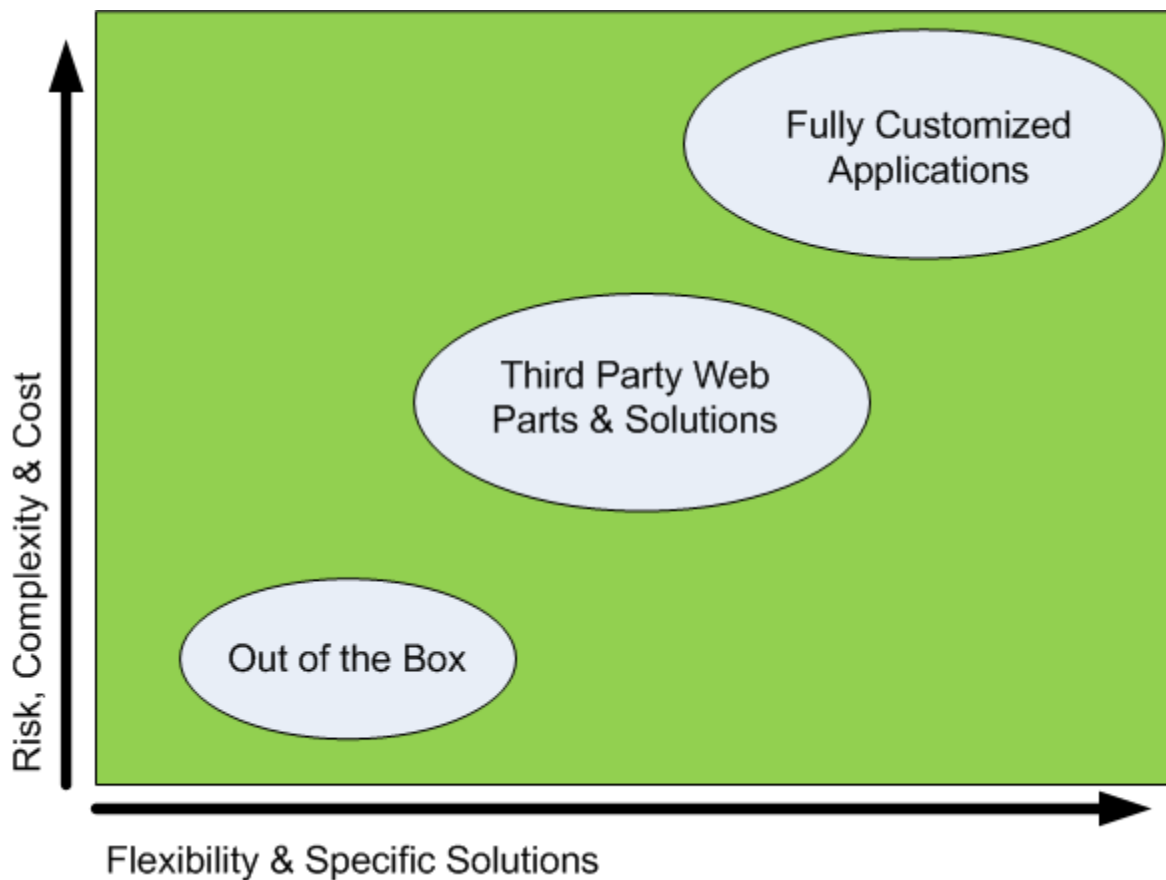
- **Upgrades:** when the time comes to upgrade the platform to the next version, all of the out-of-the-box functionality and content (should) migrate seamlessly. This is not necessarily so for custom solutions, so good documentation and planning needs to accompany the customizations.
- **Maintenance:** the core product is well supported by Microsoft; the experts in Premiere Support can help you resolve issues, but they are going to have a harder time helping you fix problems with custom solutions. Your developers will need to be prepared to support and maintain the customizations for the life of the portal.
- **Complexity:** SharePoint is already a complex platform and offers an amazing amount of functionality out-of-the-box. Customizing will add to this complexity and should be managed appropriately.
- **Cost:** most core features can be enabled and configured with a few clicks of the mouse. Custom solutions, however, can be expensive to develop. Consider whether or not custom features are truly required or are more of a "nice to have."

We highly recommend that organizations who are new to SharePoint tread very lightly when it comes to developing custom .Net solutions. Live with the product for a while and see what you can do with the

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<sup>4</sup> Note: these considerations generally apply to any customization effort, so SharePoint itself is not much different in this regard

core features plus SharePoint Designer. You'll be surprised how many workable solutions you can devise that don't require customization.



#### Content development & migration

Unsurprisingly, content is at the heart of any SharePoint implementation. Without it the portal is simply an empty shell that won't do anyone much good. When planning your SharePoint roadmap, consider the following:

- What existing content is going to migrate into SharePoint?
- What type of content is it? Web based, file based, or something else?
- Who owns the content and what will their role be in migrating it?
- Who should have access to the content and at what levels (read/edit/admin/etc.)?
- Does new content need to be developed specifically for the SharePoint portal?
- Who will create the content, approve it, publish it, and maintain it?
- How will you confirm migrated content is deleted from the old locations?

The place to start is identifying major content areas and assigning ownership of it. Get your content owners involved in the project at an early stage so they can start their planning process and you'll end up with better content, faster.

### Platform migration and consolidation

In some organizations, platform migrations (e.g. from Lotus Notes / Domino to Microsoft Exchange and SharePoint) or platform consolidations are primary drivers for their SharePoint initiative. If your organization is in this situation you should be able to demonstrate cost savings in your business case, but you'll want to consider the following:

- Not all content is going to move “cleanly” from one system to another. Lotus Notes databases, for example, are based on a different conceptual model than SharePoint lists and libraries. The migration is possible, but it's not as easy as copying and pasting or running a simple utility.
- Content should be reviewed for relevance before it gets moved. Why spend the time and money moving content if it's out of date or inaccurate?
- Communications will need to be closely coordinated between the SharePoint team, the information owners, and the end users. You don't want to move information that's critical to someone's job without clearly communicating what's happening and where the information is going.
- It can be difficult, especially in large organizations, to determine who owns what data and whether it is still in use or not. In those cases a simple solution is to leave the data in place and remove everyone's access to it, leaving a “readme” behind. If no one contacts the SharePoint team for a set period of time (e.g. 90 days, 180 days, etc.) it might be safe to archive it. Do be sure to check your organization's compliance rules to ensure you're not deleting something that you're required to keep, though!
- If you're moving from a complex system like Lotus Notes you'll need to have Notes experts on the project team as well. Most SharePoint experts don't “speak” Lotus Notes, and vice-versa, and you're going to need to be able to understand each side at a deep level to make sure the migration goes smoothly.

### Operation & Administration

The following section touches on the areas of ongoing operation and administration, i.e. what happens after the platform is deployed and users have been migrated into the system. There is a wealth of information in print and online regarding the technical aspects of SharePoint administration, so we're going to leave those topics out of scope for this paper.

#### IT operations

The SharePoint Administrator(s) will be the focal point of SharePoint IT operations, but he or she will need to work closely with other members of your IT group. Some of the roles that are usually called on from time to time are the following:

- Database administrators, to ensure the back-end SQL Server databases are “healthy” and functioning as expected. The DBAs will be responsible for keeping SQL Server patched and up-to-date and can help troubleshoot certain types of issues.

- Windows administrators, for “care and feeding” of the operating systems on the SharePoint servers. These individuals will maintain patch levels, monitor the servers, and assist in troubleshooting exercises.
- Network administrators, to assist with connectivity and bandwidth issues
- Information security professionals, to make sure you're keeping all that data properly secured and in compliance with policies and/or regulations.
- Help desk personnel, to support the end user community

### SharePoint administration

SharePoint administration is the province of the SharePoint administrator(s). The administrator(s) will perform a variety of functions, including:

- Troubleshooting and support as issues arise
- Configuration changes to the system as needed
- Provisioning new site collections, sites, etc. as the usage of the system grows
- Search tuning
- System patching and upgrading, in concert with other members of the IT team
- Usage analysis and reporting
- Cross-training site and site collection administrators
- Serving as a primary point of contact if vendor escalation is needed
- Writing utility scripts (e.g. PowerShell scripts) as needed

Depending on the size of the organization, the amount of activity surrounding SharePoint, and the nature of the user community, the administrative functions may constitute only a portion of one person's job. In larger, more complex environments it can easily be a full-time position and in many cases something that's assigned to a team.

### Change management

Change management refers to the processes and procedures your organization follows to ensure that system changes are well coordinated across environments and don't lead to outages or other problems. If your organization maintains multiple SharePoint environments (e.g. Development, Test, Staging, Production, Disaster Recovery) you'll need to ensure that changes are applied consistently across the various server farms and that the changes don't lead to problems.

Unfortunately, updating SharePoint is not as easy as just copying files from one system to another. Teams that are accustomed to working with basic websites are often surprised by the complexities involved with SharePoint. There are a number of approaches that can be taken to package changes and deploy them automatically, but in many cases it comes down to carefully documenting the changes and applying them (manually) consistently from one farm to the next.

During the initial stages of the SharePoint program, encourage the project team to work with the other members of the IT group to incorporate SharePoint into your change management processes.

## Organizational Change Management

The following section provides a starting point for addressing organizational change management as it relates to SharePoint. Like many of the topics this white paper touches on, this is a very deep topic and will not be covered exhaustively. For the executive or manager, the important point is to realize how important the change management aspects are to a successful SharePoint implementation. If an organization doesn't adequately address the organizational change management aspects, the SharePoint deployment will not be successful – even if the technical aspects are executed flawlessly.

- **Establish clear sponsorship**
- **Consider organizational readiness**
- **Ensure a communications plan is in place**
- **Plan for training, customized to various audiences**
- **Plan for support**
- **Track user adoption and promote “What’s in it for me”**

### Sponsorship

First and foremost, the SharePoint initiative needs a clear sponsor. Optimally there will be both a business sponsor a technical sponsor; see the roles and responsibilities section above for details. In addition, it can be very helpful to establish a steering committee, comprised of executives that represent the major stakeholders in the deployment and ongoing use of the SharePoint portal.

### Readiness

The term “readiness” is nothing if not vague; when we think of organizational readiness we mean the following:

- Executive sponsors are identified and actively engaged; if sponsorship doesn't exist (or exists only in a “figurehead” sense) the project will be imperiled from the start
- The project team has formed, has funding, and has a clearly established set of objectives and deadlines
- The technical resources have been hired, trained, or contracted with and have sufficient availability to work on the project
- The infrastructure is prepared for SharePoint (see section above re: Technology Platform)
- Support resources have been identified and are actively engaged in the project
- Content owners are aware of the initiative and understand their roles
- A well-coordinated communications plan has been developed to let the organization know that SharePoint is coming, what its goals are, and when they should expect to see changes

If you can check all of the boxes above your organization is in great shape and will have a substantially greater chance of success.

## Communications

It is important to develop a communications plan for the variety of audiences in your organization, especially those users who will be early adopters of the new platform. Here are some tools we've used in the past that have worked well:

- Ask the executive sponsor(s) to update their colleagues in the executive staff meeting; this is a simple step but sometimes overlooked. The other executives in the organization will appreciate hearing about the initiative first, rather than from their reports.
- Get something online quickly that you can point people towards. If you have an existing intranet, get a set of pages up about the SharePoint initiative. If not, put something on the fileserver and distribute the link.
- Plan for a series of sponsor emails that go out to the user community at large over the course of the deployment.
- Make use of email, in-person meetings, conference calls, webinars, and online resources to communicate with the initial end users. They will be your marketing, good or bad, to the rest of the organization. Make sure they understand what's happening and have a vehicle for asking questions and providing feedback.

Your communication plan should:

- Identify audiences (e.g. division, various departments, individual executives, technical teams, etc.)
- Identify communication channels (e.g. email, online, in-person meetings, "town hall" sessions, etc.)
- Assign ownership to appropriate individuals and teams
- Set the schedule
- Provide for two-way communication options and feedback mechanisms

## Training

Training is an important part of the change process and will help ensure your people are prepared and confident; a variety of options are available. Content and delivery mechanisms should be tailored for the variety of audiences.

- **Offsite classroom training:** this is most appropriate for the SharePoint administrator(s) and SharePoint developer(s). There are a wide variety of options, many from Microsoft partners who offer official MS-approved courses. While expensive, sending critical resources to a week of offsite training will give them the opportunity to focus intently on SharePoint, network with peers, and ask questions of experienced trainers. If you do opt for offsite classroom training, our suggestion is to immerse the administrator(s) and developer(s) in SharePoint a few weeks before they go to the class. This will give them at least some background in the product, which

will help give the class context; this also lets your core technical team prepare questions and scenarios to take to the class.

- **In-house classroom training:** if your organization has an in-house training group you may want to consider developing classroom training. End users can benefit from a half-day introduction to SharePoint, while site administrators may need a full day or more to address the more advanced topics of security and site customization. If this is an option for your organization and the cost can be justified it's worth pursuing.
- **Online training:** a number of vendors offer commercial online training products that are either hosted, or installable on your SharePoint instance. In addition, it's quite straightforward to develop online training materials even if you don't have a formal training group. Screen-cast software (i.e. applications that let you record what's on a computer screen + a voice-over) such as Camtasia can be purchased for a few hundred dollars and are relatively easy to use. The SharePoint administrator or other knowledgeable resources can create short, effective how-to videos that show users how to accomplish basic tasks.
- **Written materials:** there is a wealth of published books available for purchase, as well as a number of online resources. See the Appendix for details.

The most important take-away here should be: users won't "just figure it out" unless your organization is relatively technical in nature. While SharePoint is a user-friendly product, it represents very different ways of working, and providing training to your people will greatly improve the adoption curve.

## Support

This should go without saying, but preparing your support resources is a critical element in the organizational change process. The help desk, desk-side, and tier II / III support resources need to be fully prepared and ready to support SharePoint before it gets deployed. The initial user groups' experiences need to be positive; this will help generate supportive "buzz" in the organization and will improve adoption. If early users don't have the support resources they expect, they will be left to work things out on their own and may not have nice things to say around the proverbial water cooler.

## End-user adoption

Beyond communications, training, and support there are a few things the organization can do to help increase end-user adoption. Primary among these is explaining, and demonstrating, to users what's in it for them. If they are presented with tools that make it more difficult to do their jobs, they are going to find ways to work around the new system rather than in it. For example, if users are forced to enter 19 pieces of metadata every time they upload a document to SharePoint, presumably many will revert to email and file shares. However, if users see that search, views, and flexible libraries help them find information quickly they're going to embrace the new approach. So remember to emphasize the "WIIFM: what's in it for me?"

## Governance

This section of the document describes the SharePoint governance process, why it's important, and provides a basic outline for a governance document.

- **A successful SharePoint environment requires effective governance**
- **Develop a governance document**
  - Executive summary
  - Information architecture
  - Service design and features
  - Customization
  - Policies & standards
  - Information security
  - Approved tools
  - Roles & responsibilities
  - Operational management
  - On-Boarding process
  - Site lifecycle management
  - Service Level Agreements (SLAs)
- **Strike the right balance between control & flexibility**

### What's meant by governance?

Wikipedia offers the following definition of governance:

*Governance relates to decisions that define expectations, grant power, or verify performance. It consists either of a separate process or of a specific part of management or leadership processes. Sometimes people set up a government to administer these processes and systems.*

*In the case of a business or of a non-profit organisation, governance relates to consistent management, cohesive policies, processes and decision-rights for a given area of responsibility. For example, managing at a corporate level might involve evolving policies on privacy, on internal investment, and on the use of data.<sup>5</sup>*

Governance is particularly important for SharePoint for the following reasons:

- Administrative rights and responsibilities are often delegated “downward” or “outward” into the various departments and teams that make up an organization. While many systems are centrally administered by the IT department, most SharePoint environments delegate some level of administrative rights to the groups that own the various sites and information resources.

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<sup>5</sup> <http://en.wikipedia.org/wiki/Governance>

Clearly explaining how those rights and responsibilities are assigned is critical to avoid confusion.

- SharePoint offers a wide variety of features and functionality, some of which may not be appropriate for your environment. Explicitly stating which features are made available and which are not (in the governance document) empowers the SharePoint team to say “no” when needed.
- A variety of standards and policies need to be defined for the portal, covering things such as security, information lifecycles, compliance, publishing processes, approved tools and processes, etc.

In short, governance is needed to define who can do what, what will be available, what policies apply, and who's in charge.

## Governance document

Searching the web will turn up a variety of resources that will help your organization develop a governance document. The following sections are a reasonable starting point.

### Executive summary

Begin the document with an executive summary that highlights the most important concepts. Generally this should be kept to 1-2 pages and is usually written last.

### Information architecture

The governance document should define the high level information architecture, e.g. how site collections will be assigned to various divisions or groups and how global navigation will work. Optionally the governance document can refer to a separate detailed information architecture document.

### Service design & features

This section should describe what features will be available and how the portal services will be deployed to the organization.

### Customization

The governance document needs to address what types of customization will be allowed. Examples include:

- Simple point-and-click customizations of web parts and pages
- Custom branding elements and custom master pages (your developers will know what this means)
- Custom .Net development

The last bullet point, custom .Net development, has been discussed in previous sections of the document. Spend the time to think through whether this will be allowed, where it will be allowed, and what types of testing and change control will govern deployment of custom solutions.

**Policies & standards**

The governance document should clearly define policies and standards that end users and site administrators will be held to.

**Information security**

Your organization's security team should adapt applicable security policies and standards to the SharePoint platform. Security policies should be captured in the governance document or referenced in an external security policy manual.

**Approved tools**

A variety of tools exist to work with SharePoint, e.g. Visual Studio and SharePoint Designer. These tools require elevated privileges in the portal and give users a great deal of power. The governance document needs to define what tools will be allowed and who can use them.

**Roles & responsibilities**

The governance document should list and describe the major roles and responsibilities of the people involved with SharePoint. The following table can also be found in the "Technology Platform" section above:

Roles	Responsibilities
Business Owner / Sponsor	This person is usually an executive-level sponsor with budgetary authority to pay for the initial project. Usually represents the business and is primarily interested in the ROI potential of the platform.
Technical Sponsor	This person is usually an executive-level technology manager who manages the technical teams that will deploy and maintain SharePoint
SharePoint Administrator(s)	The SharePoint Administrator will be responsible for the day-to-day administration of the platform, as well as all system upgrades, major configuration changes, etc.
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Site Collection Administrator(s)	These are the people who will administer the various high-level collections of sites once the platform is deployed. In corporate environments, each division may have one or more site collections specific to their users and data; the Site Collection Administrator(s) would manage the system at this level and report to the SharePoint Administrator for technical purposes.
Site Administrator(s)	Site Administrators are often members of business departments and/or teams; usually these are "power-users" who are interested in taking on administrative duties for their department's SharePoint site(s)

SharePoint Developer(s)	The SharePoint Developer(s) will write custom .Net code to enhance and modify the base SharePoint platform. While many organizations choose to create custom-code solutions for their SharePoint portals, there are strong arguments to be made for limiting customization.
Help Desk Resource(s)	End users will rely on the Help Desk and desk-side support resources, so this team needs to be involved in the SharePoint project and properly trained and prepared
Technical Trainer(s)	The training team (or your training vendor) will need to create and/or deliver training materials to the end user community. They should be involved in the project as soon as the basic use cases and end-user audiences are identified.

### Operational management

The primary operational management standards should be defined in the governance document. These include topics such as the following:

- Change management (see section above for details)
- Patching and upgrading
- Backups and disaster recovery (DR)
- Monitoring
- System tuning
- Web analytics
- Site archival / deletion
- Etc.

In short, this section should call out the primary elements of ongoing system management or refer to other complementary documents.

### On-Boarding process

The “on-boarding process” describes how new user groups will be brought into the portal<sup>6</sup>. Generally this will cover the following:

- Roles and responsibilities of the group to be on-boarded
- Roles and responsibilities of the SharePoint team
- Training
- Content review and migration
- Team site design (including review and approval)
- Resources involved
- Support, both during and after the transition
- Sample schedule of on-boarding activities

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<sup>6</sup> Note: you may want to begin the SharePoint initiative with a set of pilot groups that get on-boarded first. If the “rules of engagement” will be different for these groups you may wish to document that separately.

- Documentation and other resources to be provided to the on-boarded team
- Workshop materials to be developed

### Site lifecycle management

The SharePoint portal will grow over time as new sites are added and new users are brought into the environment. As a result, the governance document needs to define what will be done to keep SharePoint “cleaned up” and relevant; old, unused sites will use storage space, confuse navigation, clutter search results, and generally degrade the user experience. The governance document should define:

- How ownership information (i.e. who to contact regarding a site) will be maintained
- How long a site will be allowed to go un-used before it is archived or deleted
- Whether sites will be deleted (gone forever) or archived (moved out of the primary portal)
- Whether auto-delete functionality will be turned on in SharePoint
- What compliance and information retention policies apply

### Service Level Agreements (SLAs)

The governance document should also clearly define service level agreements (SLAs) for the SharePoint portal, even though these are less “contractual” in nature for most organizations. The following SLAs are a usually defined in the governance document:

- Uptime goals
- Support schedule, e.g. when is the help desk available
- System maintenance windows
- Response time for reported incidents
- Response procedures and escalation protocol
- Incident severity ratings

In short, the document should spell out for users when they can expect the system to be available, when support resources will be available, and how quickly things will go into motion if an error occurs.

### Striking the right balance

SharePoint governance needs to strike the right balance between control and flexibility. While every organization is different it's often easier for the executive sponsors to err on the side of too much control rather than too much flexibility. This is easy to understand (it's usually easier to say “no” than to say “yes”) but keep in mind that if your organization's policies are too restrictive, SharePoint may not live up to its fullest potential and the users may not be willing to adopt the system. Our advice:

- Be flexible wherever you can
- Cover the most important bases
- Allow the governance process to grow and change over time
- Ask for feedback and act on it

## Roadmap

The following section of the document outlines some basic steps along the way in your SharePoint roadmap. Adapt them to what makes sense for your organization.

- **Try it**
- **Limited pilot**
- **Divisional deployment**
- **Enterprise deployment**

### Try it out – today!

The best way to get started with SharePoint is to start using it; documentation and online resources are great, but you're not going to understand the product until you've had a chance to try it and "live with it" for a while. Getting started is easy:

- Microsoft offers online demos; see the Introduction or Appendix for details
- There are a wide variety of web hosting companies that offer inexpensive hosted SharePoint sites. Sign up for one and use it for a few weeks; the cost is minimal and there's no engineering work for your IT group.
- Have your IT team provision a server (or virtual server) and ask them to download the trial version of SharePoint. It offers a basic install option that essentially amounts to a one-click install that builds a single server instance of SharePoint. While not quite as easy as the hosted solution, your team will get a chance to see the administrative side of things, and a couple of sharp technologists can get this done in a day or less.

### Limited pilot deployment

Once you've had a chance to try SharePoint and you're ready to move forward, consider starting with a limited pilot deployment. This can be done using minimal server resources, and will give you the opportunity to involve a carefully selected group of users. A small pilot will be a great learning experience, and getting a system set up for this purpose can be done in a week or less. The feedback and hands-on experience your SharePoint team gets will be valuable, and might be the perfect step to take prior to sending them to offsite training.

### Divisional deployment

When the organization is ready to deploy SharePoint on a widespread basis, you may want to consider whether it should happen at the divisional level or at the corporate level (we use these terms loosely, in case you happen to be a government organization, university, etc.)

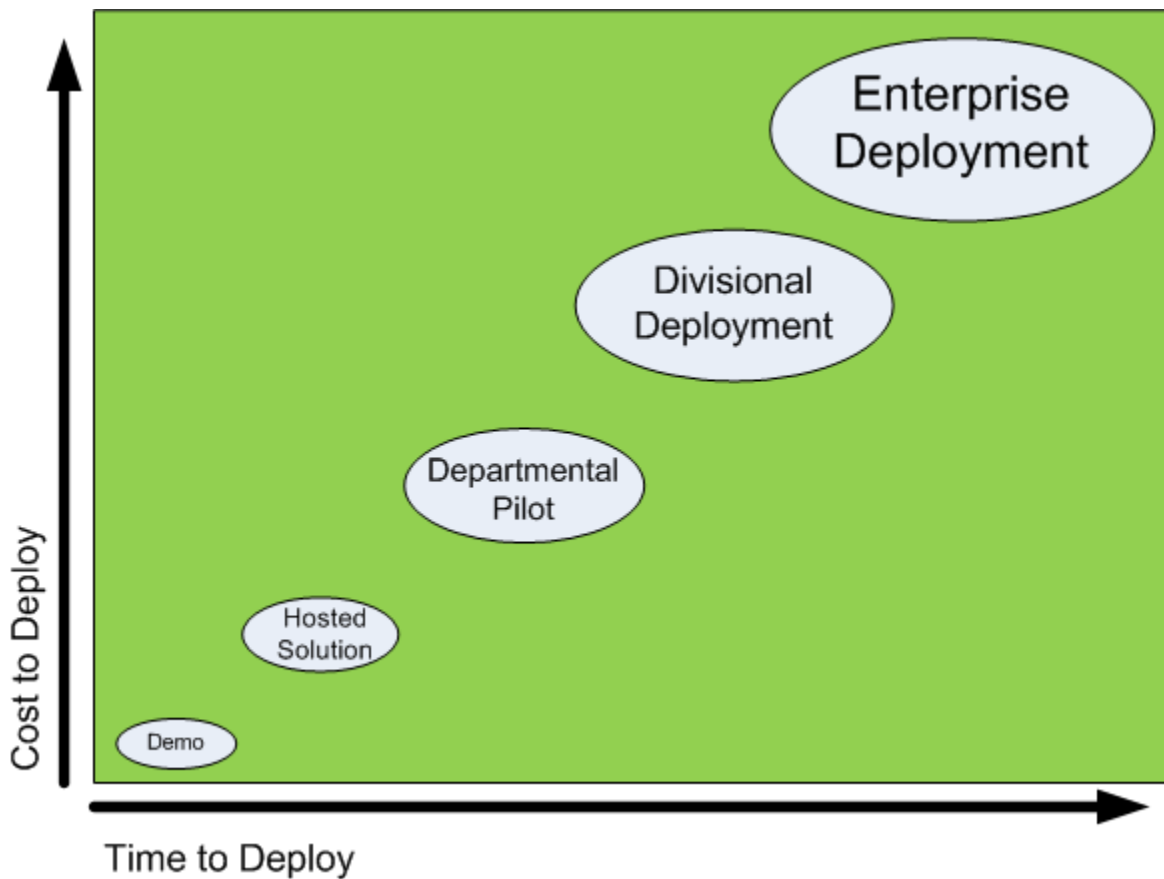
If IT is already a distributed function, it may make the most sense to allow each division to proceed with its own SharePoint initiative. On the other hand, federating the sites in the future could prove challenging. This is a question that bears deep consideration at the beginning of the planning process.

## Enterprise-wide deployment

For many organizations, deploying SharePoint at the enterprise level is the best approach. While often the most complex, this option ultimately builds an information system that crosses organizational and political boundaries and allows disparate groups of users to discover each other's work and build upon it. Microsoft IT has some interesting case study materials about their experiences deploying and managing a global SharePoint infrastructure.

## Adoption lifecycle

Understand that adoption and change will take place slowly; it's not going to be an all-at-once phenomenon. It's generally wise to set the expectation that change will happen over an extended time period, but following these steps will help you build a vision for your SharePoint program and communicate what's going to happen along the way.



## Concluding Thoughts

We hope this white paper has been valuable and that it sparked some thought and conversation in your organization. SharePoint is a complex multi-faceted topic and too often the technology discussions crowd out the topics we've presented here.

Please do take the time to send us an email with your thoughts and feedback; we always appreciate it and would like to improve this document over time with the benefit of others' insights and experiences.

Good luck with your SharePoint implementation and please don't hesitate to let us know if we can be of service.

**The Acuff Group**

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**<http://www.acuffgroup.com>**

## Appendix: Useful Resources

The following table lists some useful resources by audience:

Resource	SharePoint Administrators	Developers and Designers	Site Administrator	End Users
<b>Online</b>				
Microsoft's SharePoint site <a href="http://sharepoint.microsoft.com/Pages/Default.aspx">http://sharepoint.microsoft.com/Pages/Default.aspx</a>	•	•	•	•
Microsoft's SharePoint blog <a href="http://sharepoint.microsoft.com/blogs/GetThePoint/default.aspx">http://sharepoint.microsoft.com/blogs/GetThePoint/default.aspx</a>	•	•	•	•
TechNet SharePoint site <a href="http://technet.microsoft.com/en-us/office/sharepointserver/default.aspx">http://technet.microsoft.com/en-us/office/sharepointserver/default.aspx</a>				
MSDN SharePoint site <a href="http://msdn.microsoft.com/en-us/sharepoint/default.aspx">http://msdn.microsoft.com/en-us/sharepoint/default.aspx</a>		•		
SharePoint Team Blog <a href="http://blogs.msdn.com/sharepoint/">http://blogs.msdn.com/sharepoint/</a>	•	•	•	
EndUserSharePoint.com <a href="http://www.endusersharepoint.com/">http://www.endusersharepoint.com/</a>			•	•
Heather Solomon's blog <a href="http://www.heathersolomon.com/Blog/">http://www.heathersolomon.com/Blog/</a>		•		
kbAlertz.com SharePoint RSS feed <a href="http://kbalertz.com/rss/SharePointServer2007.xml">http://kbalertz.com/rss/SharePointServer2007.xml</a>	•	•		
<b>Printed</b>				
Microsoft® Office SharePoint® Server 2007 Administrator's Companion By Bill English, ISBN: 0735622825	•			
Microsoft Office SharePoint Server 2007 Best Practices By Ben Curry and Bill English, ISBN: 0735625387	•			
Pro SharePoint Solution Development By Ed Hill and Susie Adams, ISBN: 1590598083		•		
The SharePoint Shepherd's Guide for End Users By Robert Bogue, ISBN: 0615194494			•	•
<b>Classes</b>				
Microsoft SharePoint Training Portal <a href="http://www.microsoft.com/learning/en/us/training/office-sharepoint-server.aspx">http://www.microsoft.com/learning/en/us/training/office-sharepoint-server.aspx</a>	•	•	•	•
Course 5061A: Implementing Microsoft Office SharePoint Server 2007	•			
Course 50146A: Programming Microsoft Office SharePoint Server		•		
Collection 6285: Working With Microsoft Office SharePoint Server 2007			•	•