



SharePoint for Collaboration
Master Class led by Michael Sampson
Key Themes and Learning



Information Worker Solutions
Custom Development Solutions



Overview

The “SharePoint Collaboration and Governance” master class hosted by Storm Technology and led by respected industry expert Michael Sampson provided honest and valuable insights and approaches into collaboration and governance on the SharePoint platform.

The key themes of the master class focused on:

- The business of collaboration
- The technology of collaboration
- The people of collaboration

Key Learnings

The Business of Collaboration

Collaboration is about “co”-“labour”. In other words people working together towards a common outcome. An overarching message from the master class was that collaboration was not a new concept or way of working. People have been collaborating for all of human history but what is new is:

- The pace of business
- The global nature of working with others
- The IT savvy of employees
- The technology options to support collaboration

It is these factors that drive the need to adopt a new approach to collaboration. The challenges of a fast moving, global and virtual business environment present a new set of challenges to making “co”-“labour” work. Connecting people with people and people with information needs to happen “now” regardless of time differences or locations into today’s business world.

Examples of the old approach versus new approaches to collaboration

Activity	Old Approach	New Approach
Facilitating Conversation	Email, Letters	Blogs, Twitter, Online meeting tools
Having a Meeting	Plane, Train, Taxi, Hotel	Screen sharing, Video conferencing, TelePresence
Talking at the Watercooler	The Watercooler, Meeting in the hallway, "You had to be there"	Blogs, Twitter, Facebook, Instant messaging
Tracking and Managing Projects	Whiteboard, Meeting table, Email	Project workspaces, Microsoft SharePoint, Lotus Quickr, Basecamp
Finding Expertise	Word of mouth, Calling around	Expertise Profiles, Lotus Connections, SharePoint My Site, GroupSwim
Sharing Articles to Read	Inter-office envelope, Pages on Intranet, Email	Delicious.com, Lotus Connections, Connectbeam
Preparing Documents	Microsoft Word, Email with attachments	Google Docs, Wiki, Workspaces

Moving to the “New” Way

A key learning from the master class was the importance of the human factor. When considering moving to the “new” way, organizations need to consider:

- The mindset of their employees – how progressive are they
- What is possible – getting people to re-imagine how they do their work
- How willing are people – are they willing to experiment with a new way of doing things

In addition the master class laid out four governing rules to consider when moving to the “new” way:

- Follow the money – look to see where you can bring cost saving – e.g. time and travel
- Where is the pain – what is causing the most “distress” – e.g. document chaos
- Where is the delay – for example waiting for meeting to happen to make decisions
- Where are you today – for example is your “co”-“labour” built around email and travel

Collaboration and Knowledge Management

Key learnings outlined that the two are intimately linked. Knowledge proceeds collaboration and collaboration creates knowledge. Both are aimed at improving business performance via faster time to market, reduced costs and higher quality ideas. The two are not mutually exclusive within organizations.

Summary on Collaboration

In summary the central theme resonated around the message that collaboration is a human activity that needs very human tools. Collaboration technology merely re-enables human connection over distance and time.

Roadmap to Success

The key theme focused on “what does it take to be successful with this stuff?” Key learnings included understanding the business reasons to embrace collaboration:

- Saving in work process – time, cost and/or effort
- Increased effectiveness in work outcomes – participation, diversity, range

What is **NOT** a key business reason to embrace collaboration is

- Reduction in IT overhead

Frameworks for Improvement

The master class devolved into six frameworks that organizations should consider as part of their roadmap for success for a SharePoint collaboration project. A summary of the frameworks follows:

1. SharePoint for the Business
 - A six step framework starting with the business reason for SharePoint and concluding with guides to cultivate the practices of collaboration.
2. 90% People – 10% Technology
 - This framework focused on guides to improving the people aspect of the project from team culture through to incentives.
3. Avoiding Failure vs. Chasing Success
 - A proactive framework that laid the steps out for what organizations need to do to chase success rather than simply avoiding project failure.
4. Framework for Productivity
 - An invaluable framework that laid out what needs to be followed to ensure minimal drains on information worker productivity
5. Benefits Management
 - A step by step guide that outlines how IT can create and measure the value they deliver to the business as a result of a collaboration projects
6. Socialtext Adoption
 - Imperative to success - this framework provides the know how to driving adoption across the organization

Summary

In summary there are three key themes that govern any roadmap to success:

1. The business impact – how can you prove using SharePoint will make the business better?
2. Technology evaluation – how do you know SharePoint is right for the organization?
3. Adoption – how do you drive changes and improvement?

Organizations should be asking these questions and consistently evaluating the answers to ensure a successful SharePoint for Collaboration project.

The Technology of Collaboration

Another key theme of the master class focused on the need to ensure that the technology of collaboration was right for the business of collaboration. Michael Sampson shared with the group a seven pillar approach to evaluating technology to support team collaboration to ensure it improves work practices. The seven pillars for evaluation are outlined below:

1. Shared access to team data
2. Location independence
3. Real time join viewing
4. Team aware calendaring
5. Social engagement tools
6. Enterprise action management
7. Collaboration auto discovery

Using this seven pillar approach, Michael provided an honest evaluation of SharePoint as a technology of choice for collaboration.

Extending SharePoint

The technology of collaboration session delved into the positives and negatives associated with extending SharePoint by using third party products in conjunction with it. The upsides included better fitness to purpose, easier user adoption, streamlining of particular tasks and risk reduction. The downsides of using third product products included solution complexity, risk at upgrade times, license cost, administrator capability levels and finally the very real chance that Microsoft will provide the functionality in the next edition.

However the master class focused on three potential and valid reasons for exploring third party products and delved into an analysis on a number of products in this regard:

1. Reduce development risk
 - Products evaluated included K2 blackpoint and blackpearl, CorasWorks Workplace suite
2. Increase user acceptance

- Products evaluated included Colligo Contributor, Enterprise Wiki, Socialtext SocialPoint and Atlassian Confluence

3. Speed time to solution delivery

- Products evaluated included data migration tools (Quest Notes to SharePoint Migrator) and workflow development

Summary

Key advice to the in regards to technology evolution for third party products included:

1. Keep hard boundaries between SharePoint and the add on
2. Make sure you can justify the benefit financially
3. Do the due diligence – vendor stability, upgrade history
4. Do not mix and match too many products

The People of Collaboration

The master class focused on three key themes relating to the people of collaboration:

1. Governance
2. Engaging the Business
3. User Adoption

It's all about Governance

A key message and key learning was the importance of governance in the success of any SharePoint project. In short the guidelines, rules, policies and procedures that are put in place to make the project work.

Good governance will ensure you avoid:

1. The mistakes of yesteryear
2. Individual choices derailing collaboration initiatives
3. Information management chaos
4. Investing in a new technology without getting any benefits

A significant message made was that governance is **NOT** about IT people optimizing technical settings!

There are three groups required in a governance structure to make SharePoint work:

- Strategy and Steering Group – responsible for:
 - What are we using SharePoint for?, What are we doing with it? – alignment with business objectives, prioritizing investment and allocating the resources
- Business Impact Group - responsible for:
 - How do business groups apply SharePoint? – educating business groups and department, tailoring and customizing SharePoint, training and mentoring staff

- SharePoint Technology Group – responsible for
 - All the SharePoint “geek” stuff – administration and development, backup, infrastructure reliability

Governances will define what SharePoint becomes within the business and a key guideline is to have just enough governance not to ruin the possibility of the system! Governances themes that are important to consider in relation to SharePoint include:

- How well does the technology of SharePoint support our work?
- Who is allowed to create a SharePoint site, when and under what conditions?
- How will we get SharePoint into the hands of the business users?
- What’s our position on template standardization?
- Will collaboration sites be in one site collection or multiples?
- What will we do with sites at the end of a collaborative project?
- What’s our position on using third party tools?

Engaging the Business

An important learning was that engaging the business is imperative to the success of a SharePoint project. Michael Sampson outlined five hallmarks to making this work:

1. Joint discovery and learning – do it together because IT know IT and the business knows the business
2. Involve a strong cross section of people and backgrounds – IT plus finance, sales, marketing, HR, product development and so forth
3. Encourage permission to not know and commitment to teach – IT does not know everything about business and business does not know everything about IT
4. Foster a willingness to overlook apparent fault – strive to understand, question assumptions and don’t be offended
5. Ensure joint intention towards an evolving shared vision – everyone on the same path

Strategies and tactics shared during the session to help engage the business people included:-

- Working lunches
- One-on-one meetings
- Brown bag lunches
- Workshops
- Proof of concept examples – focused on functionality and business value

Michael shared with the group pertinent warnings around engaging the business including forcing change versus enabling change and being wary of business units and individuals just pretending to engage.

User Adoption Strategies

The predominant message of this session was the fact that it is relatively easy to deploy SharePoint compared to getting people to use it in a way that makes them more productive. To do this effectively you must be able to give people really good answer to “How is this going to improve my work and life” and be able to translate the global “why we are doing this” into meaningful personal “why we are doing this” answers for people.

The master class outlined four key ways to do this:

1. Exemplar Stories – real people, real situations – show how other people in the company are getting value and benefit
2. Real to life scenarios – to show what’s possible – “a day in the life of customer services”, “a day in the life of a research team”
3. Sandbox for experimentation – give people a place to do “try it out”
4. Introduce organizational chaos - mix things up, re-organize work groups, force people to re-create ways of working

These four pillars were support by 12 supporting ideas that covered everything from bulk loading parties to facilitated group re-imaging and zero other options!

Summary

The core message from the people of collaboration session was that regardless of how good the technology is, getting the business engaged, getting end users using the solution and putting in place strong governance for the project and ongoing use of SharePoint in the business are critical steps to success.

In Closing

In closing the master class Michael Sampson shared some live case studies of good and bad collaboration projects and provided a preview of upcoming research results in user adoption in companies across the world.

And, outlined the key steps to quick start with collaboration:

- Get the team – two conditions
 - Knowledge about SharePoint Technology and what it can do to support collaboration
 - Knowledge about the business teams and what they do all day
- Base 1
 - Pilot test to gather evidence about impact
- Base 2
 - Business case about how using SharePoint improve collaboration
- Base 3
 - Governance structure
- Base 4
 - Engage with different teams and groups

For more information on any of the content contained within this document or for assistance with a collaboration project or SharePoint implementation please contact Storm Technology at info@storm.ie or on +353 1 416 1266.