How to develop a SharePoint 2010 strategy

To gain the full benefits from using SharePoint 2010 you need to have a strategy which has to fit with your business' overall strategy. This is no different in principle to creating an intranet or digital workplace strategy.

You need to be clear, very clear, on your business’ direction now and for at least the next 12 months. This gives you time to create a strategy from which you can plan in more detail how your short term goals will be achieved.

You need to see how the business strategy focuses on areas that SharePoint 2010 can help you. These include:

- Discovering expertise in the organisation through content discovery
- Sharing knowledge across business units
- Increasing efficiency by enabling people working on similar projects to discover each other
- Reducing costs by rationalising the existing variety of technology platforms used

All of these are good reasons for your SharePoint 2010 strategy to align with your business strategy. SharePoint 2010 can contribute towards meeting these business needs and you can plan what action to take and the outcome to be achieved.

But it is not good enough to just deploy SharePoint 2010 because your IT strategy says so. What are the benefits to your business? How will it change the way people work?

My experience has shown that you need to be bold and think big when creating a SharePoint 2010 strategy. It is of little value to only change a publishing tool like the document management system.

You have more opportunity to maximise the full potential benefit if you make major changes based on clear business need and the outcome is measurable and agreed by your stakeholders – senior business representatives.

Stakeholders

Stakeholders are senior representatives from across an organisation. They are key people who can help you achieve your strategy. They are people with decision-making ability. They are senior people who are most affected by your SharePoint 2010 strategy and plans or most influential in the progress and success of it. They may fit both roles.

You need to find the right approach to get the right stakeholders sponsoring your SharePoint strategy. Use this checklist to help you:

1. Who wants to use SharePoint 2010?
2. Who do you want to use SharePoint 2010?
3. What do people need SharePoint 2010 for? Is it knowledge sharing, people discovery, document archiving, etc.?
4. Who has the most influence with the decision makers?
5. Who has access to funding that will implement your strategy?
6. What use of SharePoint 2010 will have the most value?
7. What is your timeline for starting?

When you have answered these questions, it will help you identify the stakeholders who will give your SharePoint 2010 strategy the greatest chance of success.

Your next step will be to contact each stakeholder and explain your SharePoint 2010 strategy and plans for implementing it. You need to agree the overall goals for the project and what their involvement will be in time and effort and understanding how they will benefit from it. This may be operational, political or for personal development.

**Governance**

It is how your organisation uses SharePoint 2010 that will decide what value it will bring. Like any other technology SharePoint 2010 can do lots of things well, or not so well. That’s mainly down to how you implement, manage and use it.

Part of your SharePoint 2010 strategy will need you to get the governance right for your organisation. This may be restrictive if you are in a highly regulated business. It can be looser if you work in a creative and innovative company. You need to find the right balance for employees publishing, accessing, and using the information.

You need to have a framework that sets out the different roles and responsibilities needed for SharePoint 2010 to be used that supports your organisation’s needs and enables employees to be more productive.

**Publishing permissions**

What level of control do you want to have at a corporate level? What level of control do you devolve to publishers? Setting the right level of permissions for employees publishing and using SharePoint 2010 is critical to the potential value it can bring to your organisation.

I know of two organisations of similar size (100,000+ employees) that have decided on who should be site collection administrators. One organisation has less than five while the other has made everyone who publishes a site collection administrator. Both may be right but that is a big, big, difference! For me this is the key role for SP2010 publishing. A site collection administrator’s role should include:

- Advising users how to access and use SharePoint, granting or removing access to the Site Collection
- Regularly reviewing the content published for best practice
- Logging service faults and dealing with day-to-day enquiries from site users
- Agreeing and implementing the structure and access control permissions required for sites, lists, and document libraries
- Referring users to relevant documentation and support processes
- Helping users understand how they should use it appropriately
- Making sure relevant policies, such as information security and information retention, are understood and followed by users
- Making sure users have the necessary skills to use the Site Collection
• Making sure the Site Collection is renewed or deleted by actioning the site expiry messages

You must be very careful about who you give site collection administrator rights to. There are other levels of permission you can give publishers to create pages and sub-sites, edit content, or just read only for some parts of the site collection without making them site collection administrators.

There are good reasons for making employees site collection administrators. It cuts down on the central administration, training, awareness and education if there is much to be done at site collection level.

Your SharePoint 2010 strategy may involve using it for collaboration, document management, content management, etc.

It may be right to give site collection administrator rights to encourage employees to collaborate and innovate by removing any unnecessary barriers that prevent this happening. But you really want tighter management of the corporate memory in documents with an audit trail and limit permission rights.

Getting the balance right and assigning the correct levels of permission to MySite, TeamSites and MyProfile are critical to SharePoint 2010 delivering the value your organisation expects or not.

Factors to consider

It is vital to set the right level of permissions for employees using the information published with SharePoint 2010. The value to be gained by your organisation can vary tremendously depending on how effective this is. Factors you need to consider for employees using SharePoint 2010 content are:

Mobility

It is vital that employees can use SharePoint 2010 wherever they are for their work. This may not be in their normal place of work. People are more mobile and need to use it from their mobile device, laptop or even other people’s equipment.

You need to get the balance right so there is no or minimal risk to security and maximum benefit through time saved by employees not having to go back to their workplace or contacting colleagues for the information they need (and stopping them also from productive work).

The information needs to be presented in the best format and SharePoint 2010 isn’t very good with that. For mobile devices it is a WAP, text only, format which is poor compared with what other publishing tools are capable of.

Security

It is important that people can use the information they find. It’s critical the correct information is what they find too. By this I mean they don’t stumble across some sensitive content.

It may be your organisation is regulated and you need to set different permission levels for people in one part of your organisation from another.
So, make sure when SharePoint 2010 is set up, the correct permissions are allocated for everyone depending on their employment status, which part of the organisation they belong in, and the grade and role of individuals.

If you get this right it will minimise the risk of a breach in security while making sure people can use the information they need for their work.

Accessibility

What do you want people to do with the information they find? While most people only want to view it, other people may want to contribute and build on what exists.

You need to set the correct permissions so only the right people can change it while others can read it but need to ask the owner before they can update it.

You do also need to comply with web accessibility legislation so employees with a disability have the same experience as anyone else when using SharePoint 2010. This may mean checking any device they use to help them is compatible and tested.

Content types

It is important to remember the different types of content published in SharePoint 2010.

Accredited

Accredited content is official, authoritative, reliable and up to date. This can be a policy or formal news item. Employees will be able to trust it, use it with confidence, knowing it is current and relevant. It is usually information that has a large audience. A limited number of people can edit the information, with access controlled by permissions. Usually one person will have clear ownership.

Collaborative

Collaborative content can be owned by everyone, an individual or community. It can be open to anyone to contribute or comment upon the information. It can be an opinion expressed on a blog posting or a wiki article for others to contribute to and improve further.

It is how your organisation uses SharePoint 2010 that will decide the value it will bring.

BT case study

When I was the BT intranet manager I was heavily involved in the strategy, plans and implementation of SharePoint 2010 for the last 12 months I was there. It was the biggest change to BT’s intranet since it was created 15 years before. It was a ‘work in progress’ as BT migrated all its existing content from the publishing tools it is using now for accredited and collaborative content.

BT’s Knowledge Management and Collaboration (KMC) programme has formal BT Board approval and has an agreed strategy setting out the priorities and timelines. The KMC programme has a governance model so the implementation is effective, well managed and you can see how the different boards fit together and their responsibilities.
The KMC steering group had senior representatives from across all the business units in BT with IT partners. I was a member of the KMC steering group and led teams on several projects including standards, training, support and content management.

BT’s first priority has been on sharing knowledge more easily. Employees can use choose SharePoint 2010’s People Finder to search for employees from an index list on the global navigation bar at the top of every page on the BT Intranet.

This links to MyProfile which is like the existing Directory but has more flexibility. Employees can add more information about themselves to help people searching to check more easily they have the right person because of their interests and experience. By clicking on ‘Browse in organisation chart’ you can move from MyProfile to MySite and can see how your role fits within BT and relates to other people.

MySite has several tabs including one for Whereabouts so people can see what you are doing. This information is automatically downloaded from your Outlook calendar. Another tab, Overview, enables people to see topics and skills you can help others with.

MySite content shows to people with the right permissions what you have published in SP2010. This helps people to find others who have a shared interest without any extra effort needed by you.

Employees using SharePoint 2010 for the first time will go to the Welcome page for SP2010. BT does not mention the technology in the title but what its purpose is. There is a lot of information shown but new users say this is what they need at this stage and gives them a good first-time experience.

You can request to publish on a TeamSite for project work or document sharing. It will extend to other needs as SharePoint 2010 replaces existing publishing tools and the activity they help people to do.

There is a help site that supports anyone using SharePoint 2010 for any purpose, not just publishing.

All these examples are shown in this slide presentation and now I have left BT you can find out how I can help you more.