

Microsoft SharePoint 2013

Planning for Adoption and Governance

Microsoft SharePoint 2013

Planning for Adoption and Governance

Deliver a successful SharePoint solution to your organization

Take control of the complex requirements for delivering a SharePoint 2013 solution to your organization. Led by a SharePoint MVP specializing in SharePoint service delivery, you'll learn proven methods to help you prepare for a smooth adoption and governance process throughout the enterprise. This guide is ideal for IT professionals, including service delivery managers, project and program managers, and business analysts.

Discover how to:

- Align your SharePoint solution with organizational goals and business priorities
- Engage executive sponsors, stakeholders, and SharePoint champions
- Provide detailed plans and schedules for an effective, structured delivery
- Build a team with appropriate roles to match delivery requirements
- Prepare user adoption, training, and communication plans, with clear business rules and policies
- Plan ongoing platform governance, service releases, and solution maintenance
- Build effective customer service models, and provide SharePoint support

About the Author

Geoff Evelyn, MVP for SharePoint, focuses on SharePoint service delivery and implementation. He's the coauthor of *MOS 2010 Study Guide for Microsoft Word Expert, Excel Expert, Access, and SharePoint* and author of *Managing and Implementing Microsoft SharePoint 2010 Projects*.

ISBN: 978-0-7356-7164-5



9 0 0 0 0

U.S.A. \$24.99

Canada \$26.99

[Recommended]

Microsoft Office/Microsoft SharePoint



Microsoft SharePoint 2013: Planning for Adoption and Governance

Geoff Evelyn

Copyright © 2013 by Geoff Evelyn

All rights reserved. No part of the contents of this book may be reproduced or transmitted in any form or by any means without the written permission of the publisher.

ISBN: 978-0-7356-7164-5

1 2 3 4 5 6 7 8 9 LSI 8 7 6 5 4 3

Printed and bound in the United States of America.

Microsoft Press books are available through booksellers and distributors worldwide. If you need support related to this book, email Microsoft Press Book Support at mssinput@microsoft.com. Please tell us what you think of this book at <http://www.microsoft.com/learning/booksurvey>.

Microsoft and the trademarks listed at <http://www.microsoft.com/about/legal/en/us/IntellectualProperty/Trademarks/EN-US.aspx> are trademarks of the Microsoft group of companies. All other marks are property of their respective owners.

The example companies, organizations, products, domain names, email addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, email address, logo, person, place, or event is intended or should be inferred.

This book expresses the author's views and opinions. The information contained in this book is provided without any express, statutory, or implied warranties. Neither the authors, Microsoft Corporation, nor its resellers, or distributors will be held liable for any damages caused or alleged to be caused either directly or indirectly by this book.

Acquisitions & Developmental Editor: Kenyon Brown

Production Editor: Christopher Hearse

Editorial Production: S4Carlisle Publishing Services

Technical Reviewer: William Pitts

Indexer: Ellen Troutman Zaig

Cover Design: Twist Creative • Seattle

Cover Composition: Ellie Volckhausen

Illustrator: S4Carlisle Publishing Services

Contents at a glance

| | | |
|------------|-----------------------------------------------------|-------------|
| | <i>Introduction</i> | <i>xiii</i> |
| CHAPTER 1 | Aligning organizational goals and requirements | 1 |
| CHAPTER 2 | Defining the SharePoint solution scope | 19 |
| CHAPTER 3 | Planning SharePoint solution delivery | 51 |
| CHAPTER 4 | Preparing SharePoint solution User Adoption | 71 |
| CHAPTER 5 | Planning SharePoint Governance | 127 |
| CHAPTER 6 | SharePoint delivery program considerations | 163 |
| CHAPTER 7 | Organizing SharePoint delivery resources | 199 |
| CHAPTER 8 | Building a SharePoint service delivery model | 229 |
| CHAPTER 9 | Controlling the delivery program | 261 |
| CHAPTER 10 | SharePoint customization impacting User Adoption | 285 |
| CHAPTER 11 | Managing workshops and closing the delivery program | 309 |
| CHAPTER 12 | Maintaining the solution | 327 |
| | <i>Index</i> | <i>341</i> |

Contents

| | |
|---------------------------------------------------------------------|-------------|
| <i>Introduction</i> | <i>xiii</i> |
| Chapter 1 Aligning organizational goals and requirements | 1 |
| Understanding SharePoint goals and requirements. | 1 |
| Using Goal Alignment methods. | 3 |
| Creating measurable benefits. | 6 |
| Ensuring that a SharePoint delivery program is legitimate | 7 |
| Understanding tangible and intangible benefits | 8 |
| Measuring SharePoint benefits | 9 |
| Setting conditions for SharePoint delivery program satisfaction .. | 10 |
| Forecasting User Adoption benefits | 10 |
| Estimating demand for your SharePoint solution | 11 |
| Pricing | 13 |
| Estimating costs | 14 |
| Creating SharePoint S.M.A.R.T. goals | 15 |
| Understanding Goal Alignment and the importance of User Adoption. . | 17 |
| Understanding the importance of a performance review site | 17 |
| Summary. | 18 |
| Chapter 2 Defining the SharePoint solution scope | 19 |
| Creating a learning and knowledge experience | 20 |
| Knowing your SharePoint features | 24 |
| Engaging the right people | 28 |
| Tying analysis to SharePoint features | 30 |
| Building the user requirements document | 35 |

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

| | |
|---------------------------------------------------------------------------------|-----------|
| Differences in planning On-Premise versus SharePoint Online solutions | 40 |
| What makes a SharePoint delivery program successful? | 42 |
| Creating a SharePoint solution delivery plan. | 44 |
| Adding quality to your delivered SharePoint solution | 46 |
| Governance | 47 |
| Adoption | 48 |
| Value | 48 |
| Vision | 49 |
| ROI | 49 |
| Summary. | 49 |
| Chapter 3 Planning SharePoint solution delivery | 51 |
| Setting up a SharePoint delivery team | 52 |
| Preparing a SharePoint delivery program | 56 |
| Building the SharePoint delivery plan. | 57 |
| Defining controls to manage SharePoint solution delivery. | 62 |
| Ascertaining progress reporting needs | 62 |
| Identifying who can authorize changes. | 63 |
| Keeping the stakeholders informed | 63 |
| Documenting your SharePoint implementation. | 64 |
| Establishing controls for SharePoint solution delivery | 65 |
| Engaging your sponsor and stakeholders | 66 |
| Summary. | 69 |
| Chapter 4 Preparing SharePoint solution User Adoption | 71 |
| Building SharePoint User Adoption strategies. | 72 |
| Getting support from your SharePoint sponsor | 77 |
| Sparking excitement in your potential users | 81 |
| Developing Communication Plans. | 84 |

| | |
|-----------------------------------------------------------------------------------------------------|-----|
| Creating SharePoint champions | 91 |
| Standardizing business needs | 94 |
| Building collaborative ownership | 96 |
| Understanding the importance of training | 98 |
| Social networking in SharePoint 2013 | 99 |
| Value Management and Value Engineering | 104 |
| Objectives of Value Management | 107 |
| Applying Value Engineering to SharePoint solutions | 116 |
| The importance of Value Management and Value Engineering in SharePoint solution design | 122 |
| Planning for BYOD | 122 |
| Summary | 125 |

Chapter 5 Planning SharePoint Governance 127

| | |
|----------------------------------------------------------------------------------|-----|
| Creating a Governance committee | 128 |
| The model | 129 |
| Building a SharePoint Governance committee | 130 |
| Strategy team | 131 |
| Tactical team | 132 |
| Creating a SharePoint service model | 132 |
| Creating platform Governance | 134 |
| Creating business rules | 140 |
| Creating a SharePoint training program | 143 |
| Training resource requirements | 146 |
| Training plan scheduling | 147 |
| Communication and support | 148 |
| Technical training | 148 |
| Using web analytics and auditing to provide substance to Governance | 149 |
| Understanding IT consumerization Governance | 151 |

| | |
|----------------------------------------------|-----|
| Lost devices..... | 155 |
| Lost IP..... | 155 |
| Security breaches..... | 155 |
| Information leaks..... | 156 |
| Patching of mobile devices..... | 156 |
| Creating policies for mobile device use..... | 156 |
| Getting the users involved..... | 156 |
| Building the Statement of Operations..... | 158 |
| Summary..... | 162 |

Chapter 6 SharePoint delivery program considerations 163

| | |
|-----------------------------------------------------------------|-----|
| Managing change in the SharePoint delivery program..... | 163 |
| Understanding the importance of information architecture..... | 169 |
| Building your search strategy..... | 172 |
| Understanding geographical boundary implications..... | 174 |
| Understanding why you need platform deployment documentation .. | 182 |
| Understanding the key SharePoint 2013 concepts..... | 184 |
| Topology..... | 185 |
| Considering SharePoint 2010 migration..... | 187 |
| Building the platform deployment document..... | 187 |
| Platform Overview..... | 188 |
| Functional Requirements..... | 188 |
| Performance Requirements..... | 189 |
| Human Requirements..... | 191 |
| System Management Requirements..... | 191 |
| Availability, Reliability, and Maintenance..... | 192 |
| Interface Requirements..... | 193 |
| Test Requirements..... | 194 |
| Design Constraints..... | 196 |
| Documentation, installation, and integration testing..... | 197 |
| Integration and hardware testing..... | 197 |
| Summary..... | 198 |

Chapter 7 Organizing SharePoint delivery resources 199

Organizing the delivery team199

Creating the terms of reference200

Building the delivery team201

 Strategy Brief202

 ADS203

 Engagement Summary204

 Presentations and demo sites204

Understanding the delivery team roles205

 Business analysts205

 Content strategist206

 Web graphic designer207

 Information architect208

 Infrastructure specialist209

 SharePoint administrator210

 SharePoint delivery manager211

 Solutions architect212

 SharePoint and web developer213

 The SharePoint 2013 One-Stop Shop215

 Interfaces: Teams in the organization221

 Interfaces: Consultants from outside the organization223

 Communications224

 Quality Assurance224

 SharePoint trainers225

 User interface designer226

Summary226

Chapter 8 Building a SharePoint service delivery model 229

Understanding SharePoint service delivery229

Creating a SharePoint support service231

 Task 1: Examine your resources233

 Task 2: Identify your customers235

 Task 3: Launch your services238

| | |
|-----------------------------------------------------------------------------------------|-----|
| Task 4: Manage the flow | 240 |
| Task 5: Establish query closure methods | 242 |
| Task 6: Establish reporting | 244 |
| Task 7: Control your work | 246 |
| Task 8: Communicate with your customers | 251 |
| Task 9: Survey your customers | 253 |
| Task 10: Review and improve | 254 |
| Understanding compliance, legal, availability, and resiliency implications | 255 |
| Cloud versus on-premise | 257 |
| Summary | 259 |

Chapter 9 Controlling the delivery program 261

| | |
|----------------------------------------------------------------------------|-----|
| Creating a delivery schedule | 261 |
| Tracking and communicating progress | 265 |
| Understanding the content of delivery program reports | 267 |
| Understanding the bar chart | 269 |
| Creating management summaries | 270 |
| Creating the deliverables log | 270 |
| Creating a late activities report | 271 |
| Creating a network diagram | 272 |
| Creating a milestone report | 273 |
| Understanding project interdependencies | 274 |
| Managing the finances | 274 |
| Applying financial management to SharePoint delivery programs | 276 |
| Recording actual costs and committed costs | 277 |
| Managing risks and issues | 278 |
| Managing risk | 279 |
| Managing issues | 282 |
| Summary | 284 |

| | |
|--------------------------------------------------------------------------------|----------------|
| Chapter 10 SharePoint customization impacting User Adoption | 285 |
| Deciding when you should and should not customize SharePoint | 285 |
| Using practical techniques to make decisions | 288 |
| Creating customization policies to protect the SharePoint platform. | 291 |
| Choosing the correct resources | 291 |
| SharePoint 2013 development environment options. | 292 |
| Understanding the User Adoption impact. | 297 |
| Understanding the Governance impact | 299 |
| Ensuring developer environment separation and ownership | 300 |
| Provisioning SharePoint 2013 Designer to developers | 301 |
| Ensuring that a system development life cycle is followed | 301 |
| Creating documentation for customized SharePoint solutions | 302 |
| Creating the User Solution Specification document | 303 |
| Creating the User Manual. | 304 |
| Creating the Operations Manual. | 305 |
| Summary. | 306 |
| Chapter 11 Managing workshops and closing the delivery program | 309 |
| Managing workshops. | 309 |
| Conducting the workshops | 312 |
| Brainstorming | 315 |
| Carrying out a quality review | 316 |
| Signing off on SharePoint solution delivery. | 317 |
| Confirming that training has been completed | 319 |
| Creating a closure checklist. | 320 |
| Creating the closure report. | 323 |
| Formal closure of SharePoint delivery programs. | 324 |
| Closure actions and communication | 325 |
| Summary. | 325 |

| | |
|--------------------------------------------|------------|
| Chapter 12 Maintaining the solution | 327 |
| Sustaining SharePoint support | 327 |
| Sustaining Governance | 329 |
| Sustaining User Adoption | 331 |
| Summary | 337 |
| | |
| <i>Index</i> | 341 |

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

Introduction

Microsoft SharePoint is a strategic business platform that allows people to connect seamlessly with each other in terms of centralized content management. Furthermore, as a collaborative tool, SharePoint can be used by anyone, and can be installed and configured very quickly.

The simplicity of provisioning SharePoint in this way, however, leads to issues where a business does not have the opportunity to define a SharePoint strategy, because it might not be aware there are practical and structured techniques for building, managing, and delivering SharePoint solutions. This lack of information is also compounded because SharePoint may have been provisioned through an IT project, with little to no business interaction. In IT projects, service delivery is not often seen as a priority. This often leads to issues concerning ownership, which can negatively affect User Adoption. Therefore, without the business taking ownership of the SharePoint solutions, the result is usually failures with regards to User Adoption, Governance, training, and communications.

Service delivery encompasses User Adoption and Governance

Successful SharePoint service delivery means understanding, defining, and maintaining business ownership of SharePoint solutions. Through service delivery processes, you will be able to do the following:

- Define the content of services clearly
- Define the roles and responsibilities of customers (those who pay for the services), users, and service providers clearly
- Set expectations of service quality, availability, and timeliness
- Sustain User Adoption and Governance

In my years spent working in SharePoint service delivery, I have witnessed and been a part of SharePoint delivery successes and failures. Some of these failures were due to the business not being able to convince their audience of the value of SharePoint solutions; others were due to User Adoption or training strategies not being included as part of providing a SharePoint solution.

The success of any SharePoint solution relies on a successful User Adoption strategy. User Adoption involves a cultural shift because there may be changes to the processes

and procedures that people use when a new SharePoint solution is being provided. And those changes are supposed to improve user productivity and increase return on investment (ROI), or there would be no point in providing the SharePoint solution. However, User Adoption is not simply a technical transition from one system or process into a new system or process. The success of User Adoption is measured by the ability of the users being able to use the replacement comfortably. The replacement system must be governed and supported, meaning that User Adoption, Governance, and support must be sustained throughout the lifetime of the replacement (which is called a *SharePoint solution* in this book).

Successful User Adoption requires a sequenced set of events to work; for example, the creation of a delivery program that encompasses the creation of a SharePoint solution and will include various projects to create a service delivery model: Governance, policy, User Adoption, training, administration, and licensing. Therefore, a phased approach is required.

User Adoption is the key to ROI with SharePoint. Achieving results requires an approach for gaining executive sponsorship and user buy-in. Strong User Adoption goes beyond traditional change management, and you should never underestimate the impact that User Adoption can have on any SharePoint solutions provided.

Essentially, in order for User Adoption to work, you need to consider how SharePoint is going to be provided to the customers. While these are covered in detail in the book, here is a summary of the required points:

- **Carry out customer intelligence.** You must truly define the customer base. Identify the SharePoint sponsor, the stakeholders, and the user audience. Identify what they need and expect from the SharePoint delivery team. Ensure that you can provide a way to measure how the delivery team is doing in meeting customer requirements.
- **Value your SharePoint support services.** The key to delivering great service is people, not the organization. Some SharePoint support services are delivered by empowering their support team to be proactive and be flexible.
- **Understand how customers think.** Part of a method in sustaining User Adoption is to test for the emotional elements of the user experience concerning using SharePoint. Proactively surveying users means plugging into their experiences and resolving issues before the relationship between the customer and those providing the solution to the customer breaks down.
- **Ensure that your SharePoint sponsor believes in SharePoint service delivery.** If the SharePoint sponsor does not believe in service excellence, it won't happen.

The SharePoint sponsor needs to take service delivery seriously.

- **Ensure that User Adoption strategy is aligned with SharePoint support.** SharePoint support excellence is a function of how the organization is designed. Its key elements shape the user experience, and its effectiveness influences the success of User Adoption. This is particularly obvious in the area of customer complaints. How are complaints handled? Are they treated as a priority and sorted according to urgency, or are they chucked in a pile, to be dealt with as and when possible?
- **Make a concrete link to the bottom line.** Good SharePoint service delivery ensures that users who have a great experience are more likely to continue to use SharePoint and more likely to recommend SharePoint to others.
- **Improve services continually.** Sustained User Adoption and Governance come from managing training models, which in turn drives user continuous improvement. Do not settle for a set level of service, even if you think it's good. Even if users are satisfied with service, maybe it could still be improved.
- **Understand that the future will be different.** Technology is changing the way that service is delivered all the time. Failing to grasp the opportunities and threats presented by this inevitability could lead to failure.
- **Learn from your mistakes.** Everybody makes mistakes, but winners learn from them. Advocate a willingness to change and develop your service delivery strategies based on feedback from your users.
- **Make things easier for customers.** Continually use communication channels and User Adoption tactics to identify agile, flexible solutions. Create structured delivery plans so that you do not present unclear pricing, long delivery times, insufficient information, and poor support and service.

Governance provides business ownership

In my last book, *Managing and Implementing Microsoft SharePoint 2010 Projects*, I devoted a chapter to Governance, and it dealt with what methods should be applied to the development, control, and steering of SharePoint so that the platform appears to information workers to be fully managed and has a coherent service strategy.



More Info For more information concerning *Managing and Implementing Microsoft SharePoint 2010 Projects*, visit <http://aka.ms/SP2010Projects/details>.

Over the years, SharePoint Governance has focused on how to manage the SharePoint environment. From a User Adoption perspective, this is critical. Governance underpins the most atomic elements of any business through the creation, management, and enforcement of business rules and policies. Capturing and standardizing the most fundamental of such rules—definitions and their relationships—are necessary for supporting the complex operations of any business. As such, standardization of business rules is a core element of the automated infrastructure of any enterprise. Businesses are challenged with quantifying the ROI of such endeavors in order to make sound, risk-aware business decisions. By using key business experts to understand the concrete benefits of Governance, the organization can understand the costs, benefits, and risks of business rule standardization and has made sound decisions on how to implement the standardization effort.

This book focuses on platform Governance, which defines the rules helping SharePoint solutions scale and grow. This Governance model includes not only the physical makeup of SharePoint and technical management; it includes all facets of SharePoint configuration management, the delivery of SharePoint to meet business performance objectives, and the lifecycle of the SharePoint environment, site, or component.

As discussed in depth in this book, this kind of Governance requires a shift from the perception that IT is responsible for deciding how to make business productivity more efficient. Platform Governance requires the combined strengths of the business and IT to determine the business decisions concerning the administration of SharePoint, a statement of what SharePoint will be used for, and policies concerning service areas of the SharePoint platform.

Who this book is for

Writing a book detailing how to deliver a SharePoint solution is definitely not easy, and I chose not to go into any detail on any particular solution. This is because there are many levels of delivery, ranging from “I only want an evaluation done” to “I want a full-featured SharePoint 2013 presence.” The book is aimed at those wishing to deliver any SharePoint solution, whether it is specific site solution or a complete farm solution. Therefore, this book will:

- Be a source of information that will help you implement a SharePoint presence for your organization
- Be a source of forms, procedures that will help your SharePoint project meet and exceed customer expectations and requirements
- Help you create a SharePoint delivery plan
- Help you create a Governance-aligned User Adoption strategy
- Help you create training and communication plans

What this book is not for

This book is not a technical guide to building SharePoint On-Premise environments or Office 365–hosted environments. This book is not a cookbook of development/third-party recipes. Furthermore, this book does not provide step-by-step instructions on how to install or complete tasks by using SharePoint 2013 or provide an in-depth coverage or analysis of the new functions. For that level of detail, consult the following books:

- *Microsoft SharePoint 2013 Plain & Simple*, by Johnathan Lightfoot, Michelle Lopez, and Scott Metker, which is aimed at users who are new to SharePoint.
- *Microsoft SharePoint 2013 Step by Step*, by Olga Londer and Penelope Coventry, which is aimed at new and intermediate SharePoint users.
- *Microsoft SharePoint 2013 Inside Out*, by Darvish Shadravan, Penelope Coventry, Tom Resing, and Christine Wheeler, which is aimed at intermediate and advanced power users (who are also referred to as *citizens* or *consumer developers*). This book is also aimed at project managers, business analysts, and small-business technicians.
- *Microsoft SharePoint 2013 App Development*, by Scot Hillier and Ted Pattison, which is aimed at professional developers.
- *Microsoft SharePoint 2013: Designing and Architecting Solutions*, by Shannon Bray, Miguel Wood, and Patrick Curran, which is aimed at IT architects.

Assumptions about you

At the risk of trying to be all things to all people, I have aimed this book at anybody who is involved with providing SharePoint solutions to users. This book is for those who wish to create a SharePoint delivery program that will encompass User Adoption and Governance, for the delivery manager wishing to deliver a SharePoint solution, for the

business analyst who needs to understand adoption tactics, for an organization in need of understanding what it takes to get SharePoint solutions, for those who are considering a career move into SharePoint, and for those potential and existing SharePoint sponsors who wonder what it means to deliver SharePoint solutions.

However, this is not a book aimed at the technologist. That said, there are some SharePoint 2013 concepts discussed in this book that will be useful to the technical audience. Knowledge of the SharePoint 2013 concepts in this book will help you understand and apply practical techniques, to help you build (or be part of) a cohesive, repeatable, and measurable SharePoint delivery program. Knowledge of SharePoint, while useful, is not a prerequisite; however, be aware that in order to deliver a SharePoint solution, you should know something about SharePoint concepts, some of which are described in this book, or you understand the required skill sets to deliver successful SharePoint solutions (also described in this book).

Organization of this book

This book is intended as a practical guide. The content is largely gleaned from my own experience of many years in IT and SharePoint. A large bulk has come from service delivery in IT and web-based systems, working in support capacities, defining service delivery, User Adoption tactics, and more.

Chapter 1: Aligning organizational goals and requirements

In any organization, workers represent the biggest line-item expense and the most valuable asset. Therefore, providing SharePoint to meet their collaborative challenges and ensuring productivity in using the platform ultimately affect an organization's profitability. This is because worker productivity and potential is measured against the successful delivery of whatever SharePoint solution that is going to be put in place. Aligning organizational goals and requirements for delivering SharePoint solutions is vital. Without doing this, you will not be able to quantify the value that SharePoint brings, and you will not be able to bridge the gap between technology and the business. Understanding your goals and requirements allows you to obtain better insight and perspectives, which will help you and the business to make decisions confidently. This then allows the business to take full advantage of the investment. This chapter will help you learn how to use goal alignment methods, figure out measurable benefits, and create goals. You will also learn about creating a performance review facility using SharePoint.

Chapter 2: Defining the SharePoint solution scope

This chapter explains the steps needed to set up a SharePoint delivery program and how to ensure that you can control the implementation of SharePoint solutions (which are listed as delivery items in the program). Setting up a SharePoint delivery program sets boundaries (called *scopes*) and includes initial investigations of what the delivery will achieve, who is going to do what, the schedule, controls, and managing your SharePoint team and stakeholders in an output known as a *business case*. You will learn how to create a learning and knowledge experience, create the delivery plan, and ensure that quality is defined and measurable for the SharePoint solution.

Chapter 3: Planning SharePoint solution delivery

SharePoint solution delivery is a combination of providing the solution to meet user requirements and ensuring that users can adopt those solutions. This chapter covers the basics of planning solution delivery through plan formation, managing the outputs, and engaging sponsors and stakeholders. You will learn how to set up a SharePoint delivery team, prepare the delivery program plans, create controls, and engage the SharePoint sponsor and stakeholders.

Chapter 4: Preparing SharePoint solution User Adoption

SharePoint User Adoption is all about perception, which involves the ability to map relevant business needs to SharePoint tools, the development of SharePoint champions, communication planning, training, and engaging sponsors and key stakeholders. User Adoption is not about features and technical components. User Adoption is the most critical factor in attaining SharePoint user ROI. It only occurs when SharePoint solutions are delivered in harmony with supporting organizational and behavioral change programs. This chapter will help you learn how to build SharePoint User Adoption strategies and get support from the SharePoint sponsor. You will learn how to build communication plans, create SharePoint sponsors, and standardize business needs. This chapter also goes into detail on the importance of solution ownership, training, SharePoint 2013 social networking features, how to extract value from SharePoint solution delivery, and Bring Your Own Device (BYOD) considerations.

Chapter 5: Planning SharePoint Governance

SharePoint Governance is not a hardware, software, or human resource solution. It is an organizational strategy and methodology for documenting and implementing business rules and policies. It is the act of enforcing the use of policies. By enforcing policies, standards are created, and they are designed to protect the integrity of the SharePoint solution and platform. Governance brings cross-functional teams together to identify data issues that affect the company or organization. This chapter will help you address crucial areas of platform Governance and to use practical techniques to bring Governance to your SharePoint solution delivery program and the SharePoint platform. You will learn how to create a Governance committee and a SharePoint service model. You will learn practical techniques in creating a platform Governance model for SharePoint. Also covered are the requirements for creating rules, policies, and the training model, and how to use web analytics and auditing. You will also understand some considerations for consumerization and learn how to build a SharePoint Statement of Operations.

Chapter 6: SharePoint delivery program considerations

Once a delivery program has been formed to deliver a SharePoint solution, it is important to ensure that key areas concerning SharePoint delivery are understood. Change management is vital because understanding that will help you deliver a solution meeting the required objectives on time and on budget. Managing information and search strategies are the two most important facets of SharePoint, and they must be addressed, as they relate directly to User Adoption and Governance. This chapter helps you understand the implications of provisioning SharePoint in geographically split locations. You will understand the importance of managing change, the importance of information architecture, search, key SharePoint 2013 concepts, and what makes up a SharePoint platform deployment document that describes the SharePoint platform.

Chapter 7: Organizing SharePoint delivery resources

The road to SharePoint success is defined by the people who envision the design, those who create the design blueprint, and those who build the platform based on that blueprint. All of this needs to run like clockwork to meet schedules and budgets. All SharePoint delivery programs are significant undertakings that will require skilled people and material resources to be a success. The kind of solution that you are going to deliver will invariably dictate the kind of resources needed. This chapter describes those resources and their roles, so you can associate them with your delivery program. Topics include an overview of the delivery team so you can understand their roles and the importance of creating the terms of reference for team members.

Chapter 8: Building a SharePoint service delivery model

There is nothing like a smoothly running SharePoint support environment. A high-quality support SharePoint environment helps foster great User Adoption and SharePoint champions. The key concept for sustained User Adoption and Governance comes from customer experience of the service, whose sole objective is to sustain customer satisfaction. That takes place in two ways: on a reactive basis, by solving user problems with provisioned SharePoint solutions; or on a proactive basis, by identifying better ways to improve customer experience. This chapter describes the importance of service delivery, how to create a SharePoint support service, and impacts on service delivery from compliance, legal, and cloud issues. The chapter also describes the importance of resiliency and availability of SharePoint solutions and their effects on service delivery.

Chapter 9: Controlling the delivery program

SharePoint service delivery is not reliant on any particular traditional project planning methodology. That said, the SharePoint delivery manager must have an understanding of planning and control and be able to use SharePoint technical judgment. Controlling the delivery program requires good communication, both within the delivery team and across the organization. This chapter describes key areas of schedule planning, including report delivery and managing costs. In addition, the chapter describes risk and issue management, which is crucial to mitigating the impact of any problems.

Chapter 10: SharePoint customization impacting User Adoption

Delivery of SharePoint solutions includes the understanding of the levels of customization. Technology commoditization is the rule of today's provision of apps to SharePoint 2013. This is the ability of third-party products to be packaged to allow users to deploy ready-made functionality into SharePoint easily, and to do this without developer or administrator interaction. This chapter focuses on the best practices surrounding the processes concerning the delivery of apps, when to decide customization is required, the various developer options, User Adoption impact, Governance impact, and finally the key to sustaining SharePoint support and training and documentation for any customizations. You will learn how to consider when SharePoint should and should not be customized, what kind of resources are required, what the User Adoption and Governance impacts are likely to be, and the documentation required.

Chapter 11: Managing workshops and closing the delivery program

Workshops are extremely useful to any SharePoint delivery program. They act as an instructive process to guarantee SharePoint services. You need to have workshops to ask what the SharePoint sponsor and stakeholders need, and to understand the nature of the business to which the solution will be delivered. This chapter describes what constitutes project closure, who does it, and how it is communicated. The chapter also describes what should be done as the project is closed to ensure a handover of the SharePoint solution to the client.

Chapter 12: Maintaining the solution

You must ensure that User Adoption, Governance, and support service strategies are sustained throughout the lifetime of the SharePoint solution. This chapter will help you understand how to do this. User Adoption is about changing user behavior, Governance is about enforcing business policies and rules, and support is about ensuring excellent service delivery to users and helping maintain user productivity. Therefore, the skills and methods used are not wholly technical or wholly business-oriented. They require a combination of skills and knowledge of how best to apply methods and use the practical techniques described.

Acknowledgments

There are so many individuals and groups to thank and praise: First and foremost, my greatest thanks go to my partner, Kaye, and my two daughters, Fifi and Skye; I am utterly blessed to have you in my life. The inspiration for this book came from them, and their support through the long evenings of writing was truly awesome! Thanks to Kenyon Brown and Kathryn Duggan, who did a fantastic job getting the book to production, Bill Pitts for his technical review, and Christopher Hearse in production. In addition, there are loads of people at O'Reilly behind the scenes involved, so many thanks to them also. Writing a book is never an easy task, and a good number of topics covered in this book would not have seen the light of day had it not been for technical aid and advice. Writing a SharePoint book requires a mass of information, and I have been privileged to network with and then build my knowledge to pen great SharePoint details. My thanks go to the SharePoint MVP group and the SharePoint product team, with too many members to mention them all individually (but I am no less grateful to all of you for that), and very special thanks to Ian McNeice, Duncan Hartwig, Matthais Mitze, and program members of the Institute of Analysts and Programmers and the Institute for Managing Information Systems.

Support and feedback

The following sections provide information on errata, book support, feedback, and contact information.

Errata

We've made every effort to ensure the accuracy of this book. Any errors that have been reported since this book was published are listed on our Microsoft Press site:

<http://aka.ms/SP2013AdoptGov/errata>

If you find an error that is not already listed, you can report it to us through the same page.

If you need additional support, email Microsoft Press Book Support at mspinput@microsoft.com.

Please note that product support for Microsoft software is not offered through the addresses above.

We want to hear from you

At Microsoft Press, your satisfaction is our top priority, and your feedback our most valuable asset. Please tell us what you think of this book at:

<http://www.microsoft.com/learning/booksurvey>

The survey is short, and we read every one of your comments and ideas. Thanks in advance for your input!

Stay in touch

Let's keep the conversation going! We're on Twitter: *<http://twitter.com/MicrosoftPress>*.

Aligning organizational goals and requirements

In this chapter:

| | |
|-------------------------------------------------------------------------------|----|
| Understanding SharePoint goals and requirements | 1 |
| Using Goal Alignment methods | 3 |
| Creating measurable benefits | 6 |
| Understanding tangible and intangible benefits | 8 |
| Creating SharePoint S.M.A.R.T. goals | 15 |
| Understanding Goal Alignment and the importance of User Adoption | 17 |
| Understanding the importance of a performance review site . . | 17 |

Aligning organizational goals and requirements for delivering Microsoft SharePoint solutions is vital. Without doing this, you will not be able to quantify the value that SharePoint brings, and you will not be able to bridge the gap between technology and the business. Understanding your goals and requirements allows you to obtain better insight and perspectives, which will help you and the business to make confident decisions. This then allows the business to take full advantage of the investment.

Understanding SharePoint goals and requirements

To begin to understand the nature of goal and requirement alignment, you need to understand conceptually how SharePoint is perceived by the business.

If you are responsible for managing a release of SharePoint into an organization, you may well be asked, "What is SharePoint?"

You could respond with: "SharePoint gives people the ability to create and manage data."

However, those who already have SharePoint working in their organization may well describe SharePoint as it relates to what they are doing with it. For example, they may say something like, “SharePoint provides a document management platform,” “SharePoint allows us to store and share our stuff,” or even “SharePoint provides several applications in our organization.”

The problem is the question itself. Instead of asking what SharePoint is, the more important questions are “How can SharePoint solve the information management problem?” or “How can SharePoint solve our collaborative challenges?” If those questions were answered, the objectives of those who are using or contemplating using SharePoint will be exposed, and in turn so will SharePoint’s value, return on investment (ROI), and productivity gains.

Through investigating client SharePoint objectives, those first answers can extend further into goals and highlights the value that SharePoint brings.

So, what are those values and goals? And once you are aware of them, how do you expose SharePoint benefits from those values and goals? You start by stating clearly how the benefits that SharePoint brings relate to organizational aspirations for staff information productivity, and then translate those aspirations from goals and values into a business strategy for SharePoint delivery. By doing this, you are seeking to address the organization’s collaborative and information management challenges. And as you investigate these challenges further, more goals are realized—brought about, for example, through surveys and workshops with departmental and functional business stakeholders.

You will need to be careful when exposing business goals, because you need to ensure that the related SharePoint benefits are aligned with and provide support for an organization’s business strategy. This is critical to business success. The way language is used in stating and implementing the business strategy is very important because information workers need to understand benefits and relate them to their own goals.

Overuse of jargon in any business strategy has the potential to leave people unsure as to why they should use SharePoint at all. Corporate-speak like *out of the box*, *transformation*, *tip of the sword*, and *change agent*, interspersed with management terms such as *de-risking*, *de-leveraging*, and *re-regulating*, leave people feeling, at best, cold and cynical or, at worst, bewildered. The language needs to be focused on collaborative goals (such as “I need to store my stuff and make it accessible”), the goals need to be communicated and recorded, and the feature sets of SharePoint need to be aligned with those goals.

So, to understand the goals, you need to simplify the terminology, without using jargon, in a language that can be understood by all. This is because to implement SharePoint is to implement change, and that change needs to dovetail into a constantly evolving organization.



Note A strategy stating what the workforce should be doing with SharePoint is not enough to ensure the workforce to achieve their goals. Another requirement in a SharePoint implementation and planning process is the development of awareness, learning, and support. These elements allow individuals to ensure that they understand how their productivity goals can be achieved. Those goals can then be aligned with the features of SharePoint along with the strategic direction being applied to SharePoint.

Fundamental to the implementation of SharePoint solution delivery is the understanding of the processes needed to ensure User Adoption and Governance. This is not a technical knowledge requirement. SharePoint is a business platform, not a technology provided through an IT project. Those responsible for delivering SharePoint to information workers need to understand concepts concerning setting goals and the communication and recording of benefits. This is true regardless of SharePoint version or product type. This chapter details Goal Alignment, including how to identify SharePoint benefits to meet goals, measurement methods to test the objectives, and how to factor in demand, price, and costs. This is a vital step in establishing a successful SharePoint provision, leading to Governance, policy, and realizing User Adoption.

Using Goal Alignment methods

Before explaining the purpose of SharePoint Goal Alignment, I would like to describe a situation that relates to how I managed to create it.

The example I'm describing comes from the days of SharePoint 2003. I was on the team whose task was to implement SharePoint 2003 in a large organization with a 5,000+ user base spread over 20 locations. In those days, sending paper over modems (faxing) was part and parcel of the communication landscape. The sponsor (management) was insistent that the platform get implemented as quickly as possible. I was eager to engage and get some traction from the related stakeholders (all 10 of them). So, as part of implementation planning process, I needed to communicate the organization's intention of applying SharePoint to those stakeholders.

Unfortunately for me, the decision to take on SharePoint had not been communicated to the stakeholders by the sponsor. Therefore, there was little to no awareness of a corporate intention to implement the platform. To ensure that all stakeholders were on board, I quickly created workshops aiming to describe a strategic direction, explaining features geared in that direction, and "splitting" the strategic direction into manageable chunks.

Workshops provide a great method of gathering information concerning what the stakeholders wish to achieve. They will give you chances to map those requirements to the sponsors' vision of the platform. This should be an iterative process of goal setting and stakeholder management.

The reality is that the process of setting goals in SharePoint is quite similar to how any goals (even personal goals) are set. The only differences are the types of goals and the organization. SharePoint goals are related to solving collaborative and information challenges within that

organization; for example, identifying problems with managing documents and choosing what tools are being used to solve those problems. Solving information challenges using SharePoint solutions will improve both staff productivity and morale.

Here are some examples of key challenges that require a goal, many of which you may recognize:

- "I want to be able to organize content; the problems I have are when I want to find a status report, I spend so much time trying to locate it. I search my desktop, network folder, documents folder, USB stick, and eventually find it in email."
- "I want to be able to find content; the problem I have is that often the report I want to locate is not the right one, and I don't know who wrote the report, or even when I do find the report, I have problems trying to find out who owns the report!"
- "I want to be able to store content; the problem I have is that the report I want to store needs to be classified; the report I want to store needs to be secured; the report I want to store needs to be approved."
- "I want to be able to access my report from home; the report needs to be available from another country."
- "I want to be able to email my report."

The goal with each of these challenges is to address each troublesome process with a solution that provides a productivity benefit to the client. You need to make sure that each solution aligns with the client's aspirations concerning staff productivity and management of information. You will find that some of these challenges overlap; however, the purpose of Goal Alignment is to connect all the benefits exposed from the solutions of each challenge to organizational goals and aspirations.

In setting personal goals, for example, the process of alignment is the same. Regardless of whether your goal is to earn a university degree, get a better job, start a business, buy a home, or lose weight, the process is actually not that different from aligning goals in SharePoint. For SharePoint goals, very much like personal goals, are set to be consistent with an individual's or organization's values. You establish the true identity and standards of benefits related to those goals, which leads to Governance. You then set service delivery standards, which through management inspires motivation, improves productivity, and realizes ROI.

Although the process of investigating and realizing goals is pretty much standard, the actual goals in each organization will be different in terms of how they will be achieved. SharePoint is simply a tool to solve information and collaborative challenges. To do this, you will require assistance to identify the goals and help people adopt SharePoint.



Note Deploying SharePoint technology is not going to solve the business problem by itself. Behavioral changes need to accompany it. It is just one part of a SharePoint delivery program that also includes communication and training. Both are key aspects of User Adoption. In Chapter 4, “Preparing SharePoint Solution User Adoption,” you will learn how to use methods aimed at getting users excited about using the SharePoint solution. Doing this builds the required momentum to drive the kind of change that leads to success.

In adopting SharePoint, organizations will need to (and want to) set ambitious goals. However, one of the main problems faced by organizations is not in setting these goals, but cascading them to information workers. You will need to guide information workers so that they are able to translate and internalize the organization’s goals as their own. Remember that if you do this well, motivation will increase and User Adoption will be easier to attain because information workers will have higher clarity, confidence, and conviction about achieving organizational goals and objectives.

Goal Alignment stems from the executive level and trickles down to the information workers. You must include the following in this process:

- Translate organization goals into their personal goals and objectives.
- Ensure that all participants experience higher confidence and conviction about achieving organization objectives.
- Strive to make everyone achieve greater clarity about the business’s goals and each person’s contribution toward making that happen.
- Get information workers to take ownership in creating and building on their current competence to achieve organizational goals.
- Formulate practical action plans to achieve business results.
- Strive to achieve a higher level of motivation, trust, and loyalty toward the team, management, and organization.

Goal Alignment is an iterative process. I had to map requirements at a high level for the platform, and then refine them as I continued to work on the more detailed aspect of each goal. I urge you to use these methods when you’re trying to understand what the client and stakeholders require. This will also help you with the following:

- Making decisions based on the strategic direction of SharePoint
- Resolving disagreements between stakeholders concerning the organizational goals of SharePoint

Goal Alignment is vital before, during, and after SharePoint implementation because the success of SharePoint depends on users understanding the platform and their ability to use the SharePoint solution being implemented.

Therefore, if every person has a very clear understanding of how his or her specific role in the use of SharePoint helps achieve the business mission, vision values, and goals, it almost instantly gives that individual a sense of purpose that is really powerful. Having a SharePoint solution that meets user requirements empowers users and provides measured productivity gains. Individuals will get the sense that they are contributing to something bigger than themselves. The tasks they achieve using SharePoint solutions will help the company grow, succeed, and improve productivity, profitability, and performance.

Creating measurable benefits

In order to prove the viability of implementing a SharePoint solution, you need to show that when the users employ the solution, benefits result that can be measured.



More Info The key benefits of SharePoint 2013 are defined by Microsoft as “share,” “organize,” “discover,” and “build.” These terms are described further in Table 4-7 in Chapter 4. They are also described at <http://sharepoint.microsoft.com/en-us/preview/sharepoint-benefits.aspx>.

You should never communicate SharePoint benefits as just a collection of statements that can be perceived as not being related to the evolving nature of the business. You must clarify each SharePoint benefit with stakeholders, and then record each goal that relates to that benefit. This means that the client and those who are implementing SharePoint fully understand the outcome, which can be measured. This information is recorded in the SharePoint business plan. The SharePoint business plan describes what SharePoint is in non-technical terms, as well as how the implementation of the platform will meet the business objectives.

Obtaining benefits is the sole reason for undertaking any SharePoint solution program. If there are no benefits, then there should be no program. It is for this reason that the role of SharePoint Sponsor is vital. The SharePoint sponsor will help you identify the benefits and together you will be able to glue those to SharePoint features which will make up the SharePoint solution.

Scenario 1: Fabrikam is a sales company that's been using SharePoint for one year. Most of the company's workers believe that they are competent SharePoint users. They include a small team made up of business members who own certain key sites covering functional areas of the company. This group is known as the stewards of the day-to-day SharePoint business management. One of the business members of this team wishes to propose a new piece of metadata to store information, but she wants it to be made globally available. The benefit of this piece is discussed at length, and an investigation ascertains that there would be great demand for it. A proposal is written explaining more about the new metadata, the business process under which it would be used, adoption planning, and any mitigated risks. A testing platform is provided with the new functionality in place, and the business members (with additional support from staff members) test and write a report on the business process to accompany the use of the new metadata and the choice of which sites they initially appear in. Finally, the business proposal, along with the benefits and drivers are demonstrated, agreed upon, and then released to production.

This scenario gives a clear indication that business benefits and drivers were realized, and more important, agreed to as a legitimate requirement. Note that I have not included things like whether the solution can be supported or “managed.” These are important, of course, but first you need to investigate and identify the benefits that the new metadata would add. There are conditions to this which will define other benefits related to support, resource management, and more. Investigating the requirement will deliver the true value of the solution, and therefore whether effort and resource is warranted in its delivery.



Important If there is a rush to provide a SharePoint solution without first developing a plan, then there is no point in providing that solution.

Ensuring that a SharePoint delivery program is legitimate

To be legitimate, the SharePoint delivery program must achieve at least one of the following objectives:

- Maintain or increase profitable revenue to the business, now or in the future
- Maintain or reduce the operating costs of the business, now or in the future
- Maintain or reduce the amount of money tied up within the business, now or in the future
- Support or provide a solution to a necessary or externally imposed constraint

In short, benefits are about making more money, using existing resources and assets more efficiently, and staying in business. The preceding scenario’s benefits show that it meets at least the fourth condition. Drivers are frequently defined by words such as *growth*, *efficiency*, *protection*, and *demand*, which reflect the company focus at any point in time.

Note that the first three conditions relate to the net cash flow into the business. Money is without question the key measure of commercial performance, and it includes measurement of revenue, out-payments to contractors, and other elements of running the organization. There are costs to implementing anything in SharePoint, including the fact that extra support of a new internally provided solution using built-in SharePoint features is required, or an extra cost in using external development in terms of customizing SharePoint.

The fourth condition in the previous list is often referred to as a “must-do” project. Nevertheless, it is essential that you fully record financials to determine the lowest cost, highest value, and approach to fulfilling the need. This cost can be placed in the context of the organization as a whole to determine whether the affected part of the organization or the entire organization can afford the change.

Understanding tangible and intangible benefits

Benefits fall into two categories:

- **Tangible** This type of benefit can be stated in quantitative terms.
- **Intangible** This type of benefit should be stated in detail as much as possible, but it usually cannot be expressed in concrete terms.

Whenever possible, you should ensure that benefits are tangible and clearly articulated. Tangible benefits may be either measured in financial or in non-financial terms.

Financial benefits describe the organizational objectives in terms of the following:

- Revenue
- Contribution
- Profit enhancement
- Savings in operating costs or working capital

Non-financial benefits describe the value added to the organization that is directly attributable to the project, but they cannot be described in financial terms.

As previously stated, you should ensure that benefits are as tangible and measurable as possible. Here are some examples of the types of measurements you can include:

- **Operational Performance Measures**, such as using monitoring statistics to identify search, tagging, and rating patterns. Benefits include knowledge of document management trends, sharing of content, and connecting with people.
- **Process Performance Measures**, such as the creation of a workflow solution to enhance and/or replace business processes.
- **Customer Satisfaction Measures**, such as a company-wide survey created with SharePoint, communication exercises using, for example, the SharePoint 2013 Community Site Template, the creation of training facilities using SharePoint, and the delivery of educational classroom-based training for Microsoft Office 365 in a college or university.
- **Key Performance Indicators (KPIs)**, such as the delivery of SharePoint and/or PerformancePoint KPIs to show goal-based information harvested from various locations and data sources to dashboards in one site.

You should query why the organization should spend resources addressing any particular measure or indicator. If a proposed SharePoint solution will not help achieve any of the four conditions listed in the “Ensuring that a SharePoint delivery program is legitimate” section earlier in this chapter, you should seriously consider dropping the project. On the other hand, if the delivery program is legitimate, then for each tangible benefit, you should increase the service quality in SharePoint, which in turn could help a company retain and/or increase the number of internal and/or external customers

and financial benefits. Also, increasing service quality may help the organization meet its license obligations, for example. There needs to be a justification for any assumptions, even if the calculation of financial effect is somewhat tenuous.

Measuring SharePoint benefits

Quantitative benefits involving cost can be measured at the corporate level by the relevant SharePoint sponsors, but they cannot always be measured directly for individual SharePoint solutions in a SharePoint project. However, there are other ways to measure these benefits, including the surrogate measurement and higher-level measurement methods described next.

Surrogate measurement

You use a surrogate measurement in situations where it will not always be possible to measure value in the implementation of a SharePoint solution. Consider using an alternative measure that has a known relationship to profit. Revenue and margin may be such measures; and even measures such as numbers of customers, churn, and percent utilization. When trying to measure the business benefit of a site, as given previously in Scenario 1, and when the ideal metrics really are too difficult to collect, you should find a surrogate measurement that will give an approximation. For example, if you cannot directly measure the business value delivered from the use of a SharePoint site, you can at least survey the customers for their perceptions of the site. Using a SharePoint survey component is perfect for this, as you can then also ask questions directly about the components being delivered on the site.

Higher-level measurement

A higher-level measurement should be used when it is not always possible to relate an increase in demand for a SharePoint service, particularly if there is a planned or recent enhancement to that service. For example, in a case where an existing SharePoint environment uses a key third-party component that needs to be upgraded, and there is a requirement to identify the increase in demand.

In such cases, you should consider tying the SharePoint delivery program to a higher-level business program, where the benefits can be measured. An example where one would measure at a higher level is whether an enhancement to a product is tracked at product level, rather than by individual sites and initiatives. Those would be included in the project plan whose objective is to enhance that service. The following quote is an example of a statement coming from the use of a higher-level measurement method.

SharePoint projects are coming in at approximately 50 percent of the overall cost of traditional enterprise content management (ECM) systems . . . SharePoint's benefits go beyond the cost savings associated with reducing software licenses.

Russell Stalters, director, Information and Data Management at British Petroleum

Setting conditions for SharePoint delivery program satisfaction

Even if you have difficulties with the measurement methods described previously, you should ensure that every SharePoint delivery program you undertake has a recognizable method for demonstrating whether it has been a success and met stakeholder goals. Conditions for satisfaction are used to supplement benefits measures. To create these conditions, you should use the S.M.A.R.T. method, as described in the “Creating SharePoint S.M.A.R.T. goals” section later in this chapter.

Forecasting User Adoption benefits

To guarantee, increase, and prove User Adoption benefits, you should prepare an initial estimate of the benefits (and costs). You do this because you need to provide a proposal for a SharePoint solution to give the relevant stakeholders reasons why they should use the solution. In the following stage, called Feasibility and Definition, the estimates should be turned into firm forecasts and be agreed to by the Project Sponsor.



Note The business case for SharePoint should address savings and risk mitigation. They should also explain the benefits of the product’s rich functionality and its broad user support. These are distinct selling points for SharePoint.

Forecasts serve two purposes:

- They enable evaluation of a SharePoint project against other projects or proposed investments, and allow proposed changes to the project to be assessed.
- They provide information against which the post-launch performance of the project can be measured.

The overall financial benefit to an organization wishing to deliver a SharePoint solution is the product of demand and price, minus the costs. This is the basis for justifying any solution, whether they relate to the development of components to address SharePoint functionality, the addition of a second server to an existing SharePoint farm, or an improvement to a built-in SharePoint feature in SharePoint. It is important that you keep in mind the overall picture (client vision and strategy) to make sure that no projects get created that merely suboptimize a part of the business, creating little overall benefit. To help you understand this further, examine the following scenario.

Scenario 2: Fabrikam has now implemented SharePoint. One department was used as an early adopter, and it has already begun using a SharePoint site. It now wishes to display dashboards on its site and has requested the use of PerformancePoint and Microsoft Access. However, other key departments in the organization have some SharePoint knowledge and still need to be trained; they are relatively new to SharePoint. Also, Fabrikam SharePoint support services do not have good knowledge of PerformancePoint and Microsoft Access SharePoint features.

In this scenario, one would argue that there would be little point in delivering PerformancePoint and Access services because the overall demand could decrease, but costs to support could be higher,

and the user-base count required to achieve organizational productivity (which is to increase User Adoption of SharePoint across the organization) may never be realized. The scenario has not given any justification for PerformancePoint or Access services. It could be that the implementation of such services will decrease costs and increase productivity. Although the implementation of PerformancePoint and Access services may not be costly from a technical perspective, the impact on support, training, and User Adoption could be significant. Wise judgment is needed to ensure that priorities are service delivery (support, management) and User Adoption; however, if the requirements are to be fulfilled, it is also important to deal with the impacts and risks of service delivery.

That said, bear in mind that dashboards are a fundamental component of any performance management solution. You should consider using PerformancePoint Services, which provides a set of tools and services for building highly interactive dashboard experiences that can help organizations of all sizes monitor and analyze their performance.



More Info For more information concerning PerformancePoint 2013, visit <http://msdn.microsoft.com/en-us/library/ee559635%28v=office.15%29.aspx>. For information about PerformancePoint 2010, visit http://msdn.microsoft.com/en-us/sql10r2byfbi-trainingcourse_sql10r2byfbi08_unit.aspx.

Estimating demand for your SharePoint solution

To gauge User Adoption for any SharePoint service, you make estimates of the demand for that service. Quantitative measures are essential for analyzing opportunities to use SharePoint, whether they are on-premises or off-premises using SharePoint Online in Office 365. Quantitative measures include marketing, training, sizing the infrastructure needed, and assessing resource needs.

In the context of identifying business benefits for SharePoint, demand is simply based on volume. To determine this, you must answer such questions as how many individuals will be using the solution? What will the performance hit on the SharePoint infrastructure be? What is the demand on the level of support required to manage the solution?

Every SharePoint solution goes through an initial investigation to identify the demand for the service. This needs to be done in broad terms only. Where possible, focus on people's experience with similar products. Consider the demand statement in the following scenario.

Scenario 3: Fabrikam wishes to replace its document management system (DMS) with SharePoint. There is an understanding that at least half the organization accesses the current DMS directly on a day-to-day basis; the others perceive the service as the core tool for managing data.

To gauge demand in this scenario, a feasibility study would be based on techniques such as the following:

- **Expert opinion** There may be current users of the current DMS who have good working knowledge of its effectiveness, performance, support, and other features. Those people would

be interviewed. In addition, SharePoint technical experts are asked their opinions about any integration and/or migration possibilities between DMS and SharePoint.

- **Panels** Key stakeholders in the organization are surveyed to identify problems with the current DMS.
- **Market research** Information is provided about the SharePoint document management capability, including newsworthy information concerning DMS and its use in other companies, and whether those companies have adopted SharePoint (and the reasons behind that decision).
- **Pilot studies** SharePoint test environments are created to allow those involved to try SharePoint document management features under guidance and observation.
- **Competitor experience** Investigations are carried out to identify whether there are any products other than SharePoint whose required functionality is more effective in terms of support. In addition, the issue of whether their support for SharePoint integration is available and supportable by the organization is explored.



Tip Panels are extremely useful in brainstorming, even forum meetings. Both are suitable for low-risk projects. These panels must be made of representatives of those who will use the solution and those representing the SharePoint platform.

Estimating demand for your SharePoint solution is a significant task. You should identify people to help you do this, and the SharePoint sponsor can advise you on the kind of resources available to you.

There are many examples where you need to estimate demand for a SharePoint solution including the following:

- The organization has little relevant experience and needs further assistance (such as organizations that require a structured delivery approach).
- The SharePoint project seeks to obtain competitive advantage through differentiation or innovation. This is particularly true for organizations that want to use Office 365 SharePoint as a public website.
- There are rapidly changing market circumstances. This means that solutions created need to adapt easily. In addition, there needs to be flexible design capabilities in the product.
- You need a second opinion to check assumptions. As pointed out earlier, the importance of getting assistance to implement any SharePoint solution cannot be understated. Getting confirmation from experts in the field is vitally important and is extremely useful to back up a business case.
- You need help to achieve a consensus where stakeholders disagree. Chapter 2, "Defining the SharePoint solution scope," details a number of methods you can use to engage the

stakeholders. Also, you need to ensure that all stakeholders understand the nature of the client's vision of and aspirations for SharePoint.

- You want to promote SharePoint. Doing research concerning the key benefits of SharePoint generically, and then applying those benefits to organizational and information workers goals, are key ingredients in designing any solution. Again, this requires help from experienced SharePoint users.

Once the basic demand is understood, you should model the solution to determine the size of the platform infrastructure required to support the solution. For example, there is no point in releasing a solution on the organization's SharePoint production platform if information workers are dealing with webpages that take five minutes to display because the solution is hogging SharePoint infrastructure resources. The following scenario gives an example of what happens if you do not model the solutions infrastructure requirements.

Scenario 4: Fabrikam requires a business process workflow that will inform specific individuals when to check sales details on a SharePoint site. After investigation, a solution is created by a third-party company on its platform. Fabrikam has little experience in SharePoint platform management; the firm has only a production environment available, and there's no way to test the solution. The third-party organization suggests testing with its equipment, but the infrastructure it uses is better than Fabrikam's, and the test group is only a fraction of the number of information workers that will use the solution. A test is performed that successfully meets the requirement, and the solution is released to production, whereupon there are immediate problems. Fabrikam's entire SharePoint platform performance falls precipitously, information workers complain of being inundated by emails from the new solution, and the information workers originally assigned to use the product find the solution far too slow.

You can guess what happened to the solution after that, including the impact both from a User Adoption perspective and a risk management perspective. The rule of thumb when gauging demand is to model the solution on the actual infrastructure, with the actual information workers.

Pricing

All SharePoint solutions cost money regardless of configuration. In terms of ensuring that the program is legitimate, pricing must be considered, and the organization made fully aware of all the costs required to deliver the program.

For a short-duration program that is well understood and where competitor reaction will not affect prices, you should use price projections—the more you do this, the more experience you will gain. You must make sure that your pricing projections take account of the following:

- **Commercial objectives** The overall SharePoint strategy should relate to the needs of the solution. Commercial objectives could relate to organizational positioning; for example, if the organization has global offices, then you need to identify alternatives for SharePoint provision in those offices. Doing so will increase costs like infrastructure and support, but it also improves performance and regional resilience.

- **On-premises versus off-premises** SharePoint On-Premise costs include licensing and any additional costs concerning support, installation, and maintenance. SharePoint Off-Premise (also known as SharePoint Online, part of Office 365) is where SharePoint is provisioned; SharePoint needs a simple configuration, and the cost for support is vastly reduced. This is further discussed in the “Features” section of Chapter 2, and in the “Understand On-Premise and Off-Premise” section of Chapter 8, “Building a SharePoint service delivery model.”
- **Pricing strategy** This fully depends on the scope of the SharePoint environment, its type, and the solutions that are in place or are going to be in place. Adding third-party solutions could charge on a server-by-server basis (for example, software provided is charged per web front-end server). Other third-party solutions charge on a rolling scale based on the number of customers using the SharePoint farm.
- **Customer charging policy** To claw back costs and charges for storage, SharePoint features like quota can help. Note that in the early stages of SharePoint On-Premise in an organization, there is no sense in charging customers for SharePoint; however, charging for site use could work for existing SharePoint farms where platform Governance is being further developed. Quota can help enhance platform Governance even further. For example, you could investigate charging per gigabyte for using SharePoint online in Office 365.



More Info For more information about SharePoint pricing and licensing details, visit <http://sharepoint.microsoft.com/en-us/buy/Pages/Licensing-Details.aspx>. For Office 365 pricing details, visit <http://www.microsoft.com/en-us/office365/compare-plans.aspx>.

Estimating costs

When figuring out what a solution costs, you must include any cost that increases as a direct result of the resources required to deliver the SharePoint solution, including the following:

- **Service delivery costs** SharePoint support services cost money. People will use the SharePoint solution only if the service provided is considered to be “good.” That means that SharePoint needs to be managed, which will require money and resources. Those costs will increase based on the complexity of the SharePoint environment, combined with the skill sets of those who manage the platform. Those costs will require justification. The support provision will need to be measured to ascertain the value of the service being provided.
- **Operational costs** These are infrastructure-related, material costs. An On-Premise SharePoint platform costs money because that environment is made of servers. These costs also include software, licensing, and annual support. In addition, there could be costs associated with storage (for example, where disk storage is charged back to the business unit based on the quota applied to their SharePoint sites).

Justifying these costs is vital. Higher costs will ensue if there is little Governance applied to SharePoint, as will costs for wasting staff time if, for example, the platform performance is slow or has not been adequately configured (for Search, for example). There is no point whatsoever in choosing a

cheap option for SharePoint adoption if there will be a detrimental impact to the ongoing support of that SharePoint provision.

Creating SharePoint S.M.A.R.T. goals

To align individual and company goals, you should consider using the S.M.A.R.T. methodology. S.M.A.R.T. goal setting is a very effective method of producing peak-level performance by motivating and increasing stakeholder engagement; which in turn increases User Adoption. S.M.A.R.T. (the name is derived from the initial letters of each of the following points) is a widely recognized process with these characteristics:

- **Specific** The specific goals should address the five Ws (Who, What, Where, Why, and When).
- **Measurable** Technologies play a tremendous role in helping define the progress of goal execution, and they need to be able to establish concrete criteria for establishing the exact proportion of a goal that has been realized.
- **Attainable** Realistic goals motivate the SharePoint team, as well as anyone using the solutions created by the SharePoint team. Overly ambitious goals on the other hand, do the opposite.
- **Relevant** Goals must be relevant. They must have clarity of definition to be accepted and understood by all participants.
- **Time-Based** Goals must have a clear, objective time frame.

Specifically, you ensure that goals are specific and measurable, and make sure they are compatible. For example, when creating a SharePoint solution that is going to be used across an organization, you would compare information and collaborative goals from each of the relevant functions in the organization for compatibility and alignment. For example, sales goals should be compatible with operations, finance with HR, quality assurance with manufacturing, and so on. To carry this out, you could use results from user requirements investigations gathered for each function, then compare goals to identify ones align. From there, you focus on those goals, identifying what SharePoint tools, components, and features are relevant. Note that the organization will continue to move rapidly, so ensure that the goals you are collecting are at a sufficiently high level so that alterations in the way the function operates do not affect the goals.

Goals must be unambiguous and articulated clearly. They must state exactly what needs to be achieved, and in what time frame.

Here's an example of a badly written goal:

"I am going to try to deliver SharePoint search."

It is badly written for the following reasons:

- It's not specific.
- It's not measurable.

- It's not time-bound.
- There is no indication that someone is going to deliver SharePoint Search by a specific date.
- There is no way of telling whether or when the goal is going to be achieved.

Now, here is an example of a well-written goal:

"I am going to optimize SharePoint Search by providing a Query Rules solution to enable Promoted Results by the end of December."

It includes all the attributes of a S.M.A.R.T. goal:

- The goal is specific. It relates to a facet of Search.
- The goal is measurable. Either it can be achieved or it can't.
- That goal can be agreed to by the relevant stakeholder(s).
- The goal is realistic. Providing Search includes a vast number of facets—Promoted Results is just one of those.
- The goal is time-bound. Promoted Results will be provided by the end of December.



Note Query Rules is a feature in SharePoint 2013 that allows you to manage search keywords, which enables Search Result promotion. For more information on this, go to <http://technet.microsoft.com/en-us/library/jj219620.aspx>.

You must make sure that the goals that the SharePoint solution is aimed at are clear and unambiguous. Poorly written goals use indefinite words like *try*, *could*, *should*, *possibly*, *hope*, *attempt*, *probably*, *might*, and *maybe*.

Here is a real-life example of a goal statement by a client. His company had SharePoint deployed but was experiencing problems with getting people to use it:

"We hope that SharePoint will probably be used a lot more by the end of the year..."

I pointed out to the client that this goal was not specific enough because it did not detail what to do to accomplish it. Instead of saying "by the end of the year," which is not a time-bound statement, I suggested that they pick a date.



Tip Creating SharePoint solution goals can be daunting. To help you with this, consider using or becoming a SharePoint business strategist. Morgan and Wolfe is a unique global Microsoft partner that specializes in SharePoint business strategy using the Sequenced And Logical Enterprise Methodology (SALEM™) process. The company has consulted with and advised numerous global corporations, providing leadership. The SALEM process helps organizations define strategy and organizational goals for SharePoint adoption, including instruction on associated technologies. Visit <http://thesharepointstrategist.com/> for more information.

Understanding Goal Alignment and the importance of User Adoption

Goal Alignment and User Adoption are bound together. Using SharePoint can meet whatever collaborative challenges are based on user requirements; however, you must ensure that whatever objective that needs to be met has “value.” In Chapter 4, you will learn how to apply Value Management methods to give a measurement of SharePoint “value.”

The following scenario focuses on how SharePoint can help you achieve Goal Alignment.

Scenario 5: Fabrikam is a sales company dealing in coffee products and is already using several SharePoint solutions. It is currently using SharePoint 2010, planning to improve its main internal publishing portals, and to include numerous features like FAST Search, with a possibility of extending Governance methodologies by implementing specific products. There is a question of whether there is value to go down this route, when the release of SharePoint 2013 is imminent. Is it better to simply upgrade to the newest version rather than trying to improve the existing SharePoint 2010 platform?

The organization is already using SharePoint 2010. This means that its information workers are probably a combination of people who are used to using SharePoint 2010 and users who are new to the platform. In addition, the company wants to improve its current platform and add more functionality.

Fabrikam’s goals are pretty clear: increase the productivity of the current platform by exposing users to more features. Crucially though, they also want to look at Governance, which still requires work.

Since User Adoption of SharePoint is crucial, the answer to this would be to approach any upgrade as a separated program. Two key reasons for this are as follows:

- User Adoption means “business change,” and therefore it creates a cultural shift.
- Training and Governance in the current version would ease the transition into SharePoint 2013.

Hence, for this example, Goal Alignment is based on helping the User Adoption plan focus on training and orientation, because that effort will help with the next major project planning into implementing SharePoint 2013.

Understanding the importance of a performance review site

To design, build, and deliver operations (and management), the SharePoint solution needs skilled individuals representing technical, stakeholder, coordination, and management interests. This team would be spearheaded by a business sponsor and stakeholder group. A SharePoint-savvy project manager will be assigned, who could be a SCRUM master, a service delivery director, or a program manager. Documentation control and management of any deliverables are extremely important. Everything needs to be centrally stored, secured, and accessible to the delivery team.

There is no better place to create repositories to store this information than SharePoint. This is a good way to introduce the business members of the SharePoint solution delivery team to SharePoint. Crucially, this also allows key stakeholders to understand the concept of using SharePoint, even if all they are doing is accessing the information from a link. You should indicate the following to business members of the delivery team when showing them SharePoint:

- SharePoint 2010 includes the ability for repositories to be created and managed, such as project tasks, an issue tracking list, and a task list. In addition, there are workflows that can be configured to work with those components.
- SharePoint 2013 includes all SharePoint 2010 features, and much more functionality concerning project management sites. SharePoint 2013 also has several new features, such as Review Workflows for managing project proposals and Project Web App connectivity. The Project Web App provides lists that include Project Issues, Project Risks, and Project Deliverables.



Tip The Project Web App also synchronizes with Microsoft Project 2013. For more information about Project 2013 and SharePoint integration, visit <http://technet.microsoft.com/en-us/sharepoint/fp123606.aspx>.

Summary

This chapter focuses on the preliminary work that you need to do to develop a program that implements SharePoint solutions. Key points include:

- Goal Alignment is crucial to ensure that corporate goals dovetail into information worker goals and vice versa.
- SharePoint business benefits should be measured against a known baseline.
- Make SharePoint business benefits tangible wherever possible.
- Place those SharePoint business benefits into the wider organizational context.
- Identify unwanted side effects from your SharePoint projects. Optimizing one part of the organization for implementing SharePoint solutions may not be best for the company as a whole.

The establishment of these goals and organizational alignment sets the stage for determining the scope of the SharePoint solution, as described in subsequent chapters. You will also learn about the process of establishing scopes for delivery of solutions, and the various features of SharePoint 2010, SharePoint 2013, and Office 365.

Planning SharePoint solution delivery

In this chapter:

| | |
|---------------------------------------------------------------------------|-----------|
| Setting up a SharePoint delivery team | 52 |
| Preparing a SharePoint delivery program | 56 |
| Building the SharePoint delivery plan | 57 |
| Defining controls to manage SharePoint solution delivery | 62 |
| Engaging your sponsor and stakeholders | 66 |

Microsoft SharePoint 2013 provides an incredible number of benefits that can empower business users, enabling them to collaborate; tag, rate, and publish content; and track tasks. Even with all this technical capability, none of it will be meaningful to users unless there are plans set to design, implement, and communicate training to users. SharePoint solution delivery is a combination of providing the solution to meet user requirements, and then ensuring that users can adopt those solutions. This chapter covers the basics of planning solution delivery through plan formation, managing outputs, and engaging sponsors and stakeholders.

Providing a SharePoint solution is not something that can be achieved by one person. You will need to build a solution delivery team to design and implement the solution. The structure of the delivery team very much depends on the solution scope, the solution's complexity (technical implementation and business User Adoption), and how the solution fits into the SharePoint environment (including the support and maintenance of that solution going forward). The kind of human resources required for implementing the solution to an on-premises SharePoint environment will be different from off-premises SharePoint. SharePoint Online, through Microsoft Office 365 off-premises solutions, is implemented in a Software as a Solution (SaaS) environment. This represents a shift from traditional on-premises software solutions.

With SharePoint on-premises, solution implementations usually involve internal technical staff being involved because they govern the internal SharePoint platform under which the solution would operate. There would be technical and security-related policies concerning how any solution is deployed. This also relates even to SharePoint off-premises environments that are Platform as a Service (PAAS), where the environment is available in the cloud but still managed by a SharePoint team.

Delivery of SharePoint to an organization is based on meeting the organization's information and collaborative challenges. Here are several actions that will be requested:

- Creation of a SharePoint Farm
- Creation of a Web Service
- Implementation of an off-the-shelf app (including customization)
- Implementation of an off-the-shelf app (not including customization)
- Implementation of an SharePoint built-in app
- Implementation of a third-party tool (to provide extra functionality to SharePoint)

No single person can deliver any of these solutions. Implementation of SharePoint is not simply a technical installation—it requires business and technical teams to work together. Therefore, a team that offers various types of people skills will be required to help implement and support the solution. Chapter 7, “Organizing the Delivery Team,” describes the roles required to deliver a SharePoint solution delivery program. In Chapter 8, “Building a SharePoint service delivery model,” the “Build in support to aid service delivery” section provides more information on the roles required to support the solution.

Therefore, to analyze, design, build, test, and deliver a SharePoint delivery program, you will need to put together a SharePoint delivery team. Let's now examine in greater detail how to do this.

Setting up a SharePoint delivery team

As previously stated, SharePoint solutions are limited only by the imagination of their creators. They can be designed and implemented using SharePoint on-premises or off-premises. However, the construction of the delivery teams differs depending on the desired result. Regardless of the kind of solution implemented, there are support requirements to consider, which then increase the team size required (because this may include internal teams, external teams, or both). Consider using external providers who can help build your SharePoint delivery team. Table 3-1 describes the types of providers and their offerings.

TABLE 3-1 Types of services to deliver and support SharePoint solutions

| Offering Type | Description |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Consulting services | Paid on the basis of what you want them to tell you. Examples include strategy, development, configuration, and auditing. |
| Professional services | Paid on the basis of what you want them to do. Examples include SharePoint training, installation, and support. |
| Managed services | Paid to manage entire environments. Examples include back-end monitoring to resolution of Office 365 environments, back-end administration on-premises SharePoint, Administration, and so on. |
| Outsourcing services | Paid to operate specific parts of the environment. Examples include third-party solutions that are integrated into SharePoint. |

Organizations may simply want guidance or perspectives concerning SharePoint or best practices and may be looking for consulting services as well. Others may want to apply a consultant's expertise to specific objectives, and that is where consulting blends into professional services. Extending the train of thought even further, where the organization wants very limited involvement and is looking for a vendor to own and provide the full service, managed or outsourcing services typically are engaged.

The reason that these concepts are important lies in the way that they relate to the proximity of the solution to the organization. If, for example, the organization is just procuring an off-the-shelf solution, for example, then they typically would need basic support and training services. On the other hand, if an Office 365 environment is being provided as a managed service, the organization would ask the vendor to manage the entire environment from a support perspective and have very little involvement with the product itself.

The size and complexity of the solution being delivered will also identify the size and skill sets required to deliver the solution. A solution could be as simple as implementing a Microsoft Access packaged app solution from the Office Store, or as complex as delivering customized apps or full-blown SharePoint environments.



Note Consider using consulting services to help you deliver the solution. No one is a SharePoint superhero; do not expect your IT teams to have all the answers.

There are three types of SharePoint solution delivery teams:

- **Short-term** This kind of delivery team is established only for the duration of the delivery. This could be a consulting service, or members of an existing SharePoint team (where the solution delivery is non-complex).
- **Cross-functional** This kind of delivery team provides necessary skill mixes. For example, in the delivery of an on-premises SharePoint farm, resources may be required from other parts

of the organization, which are responsible for support parts of the technical infrastructure. Examples of this include Microsoft SQL Server teams, network teams, and platform-building teams. Also, you should consider that in most deliveries, individuals are required to represent the business to provide guidance on user requirements; they are also part of the delivery team because they provide skills relevant to understanding and defining business requirements. Most delivery teams for SharePoint are cross-functional.

- **Frequently part-time** This kind of delivery includes members who are fulfilling line and delivery tasks.

Bearing this in mind, it is essential that from the very start you fill the key delivery roles (business sponsor, and delivery manager). See Figure 3-1 for an example of hierarchy of roles.



Note You do not have to use the job titles “business sponsor” and “delivery manager,” so long as the roles are fully understood across the delivery team.

Many of the team members are likely to be part-time or have other daily duties to attend to, so get their line manager to agree what their commitment is and how changes to that commitment should be handled. The line managers may wish to, or be asked to, undertake a quality assurance role (as described in the “Adding quality to your delivered SharePoint solution” section in Chapter 2, “Defining the SharePoint solution scope”). If so, this must be agreed upon.

For each team member, you should write a Terms of Reference agreement describing the responsibilities of the role and ensure that each team member signs it. Once this is done, summarize those roles in the SharePoint solution’s business case.



Note For delivery teams where there is cross-functionality, there may be a requirement to create a Terms of Reference document confirming exactly what their role is in helping shape and deliver a SharePoint solution. Taking those previous examples, building a SharePoint farm on-premises and requiring consulting services will require a terms of reference summary for that team, and terms of reference for internal interfacing teams, and for specific areas where individuals need to collate user requirements (for example, business analysts).

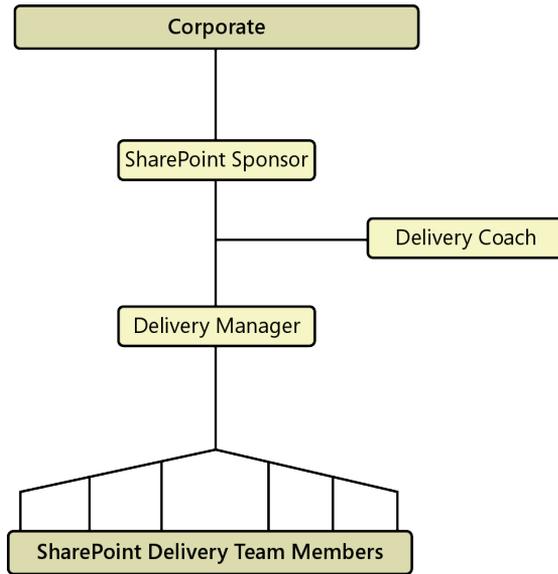


FIGURE 3-1 A typical SharePoint delivery team's roles and hierarchy.

When a SharePoint team is working well together, they have complementary skills and are committed to delivering a SharePoint quality solution and user experience. You should aim to build a delivery team that has an environment of openness and trust because this creates a solid communication base. Doing this right when you set up the delivery program is ideal. Even if you are clear on what needs to be done, you should allow some time for the team to understand and contribute, because that will lead to greater commitment and better results. You do not want a delivery team starting as in the following scenario:

Scenario 1: Fabrikam uses On-Premise SharePoint for basic collaborative services. Its HR department had a request to enhance the People directory, housed in a third-party system. The department wanted to use SharePoint social features and decided to use the skills and tagging features, as well as the SharePoint profile builder. For this to happen, the third-party system would need to be integrated into SharePoint. A delivery manager was selected to deliver the enhanced People directory in SharePoint through integrating the third-party system. The delivery manager, who had a good understanding of the existing directory, drew up a plan of action. However, in that plan, he did not check with the HR team. His reasoning was that the implementation would be faster using a consultancy. The delivery manager assumed that the consultancy would know intuitively what had to be done, and he stated that he did not want "too many long, drawn-out discussions and workshops." The delivery manager requested that the consultancy start building prototypes for a new People directory to replace the third-party system. Unfortunately, when the consultancy staff met with HR to demonstrate one of the prototypes, they faced a hostile reception, which resulted in backtracking and chaos. There were many angry exchanges, and the delivery manager was blamed for inadequately communicating his intentions to HR. He was also blamed for the failure to construct the delivery team and not keeping all parties informed concerning the delivery plan. Finally, Fabrikam executives intervened and replaced the manager with another individual from the same department, who better understood the business

requirements. Replacing this manager cost time and money, including him needing to work hard to rebuild confidence and trust with the HR department.

SharePoint solution building can be highly charged and fast paced in the beginning, and eventually, it will become part of the organization's standard operations. The delivery team will form and then form again as more SharePoint solutions join the environment. Choosing the right people for your delivery team is a vital element of an evolving SharePoint environment, and those people need to be willing to be part of the team. That said, willingness to participate in a SharePoint delivery team does not guarantee SharePoint solution implementation success; ability to function within the team is also vital. When people are thrown into a SharePoint delivery program, those without experience will flounder and will need assistance. Plan the team according to how focused each person is, and ensure that managers also focus on promoting good SharePoint knowledge building of their team members. This creates strong delivery successes, and creates SharePoint champions, who then can further promote and showcase their skills and creations.

Preparing a SharePoint delivery program

You will need to prepare a SharePoint delivery program so that you can do the following:

- Map user requirements to SharePoint features and capabilities correctly.
- Set, agree on, and prioritize solution delivery.
- Identify materials requirement and resources (for example, SharePoint infrastructure, connected teams).
- Staff your SharePoint delivery team appropriately (covered in the previous section, "Setting up a SharePoint delivery team")
- Train the delivery team so that all its members can understand the key features of SharePoint that will be implemented.

A SharePoint delivery program requires a delivery scope, a sponsor, and a method to measure progress and success.

- **Creating and managing the delivery scope.** This topic is described further in Chapter 2. The scope is where activities are specified, prioritized, and scheduled.
- **Assigning accountability** SharePoint solution delivery can be as simple as adding features to a site, or as complex as creating a new SharePoint environment. Either way, you should assign an owner for each activity who will be accountable for its completion.
- **Monitoring progress** In addition to assigning accountability, you will need to assign people to roles that monitor progress and ensure that that progress reports are given to the SharePoint sponsor and stakeholders. The delivery plan provides a baseline against the progress of key activities on the plan.

Building the SharePoint delivery plan

A core aspect of the SharePoint delivery program is planning. *Planning* describes the work required to implement the SharePoint solution. You should prepare two sets of plans. The first is the *Detail Plan*, which includes the delivery schedule. The *delivery schedule* is a progress bar chart used by the delivery manager and team members to control their day-to-day work. The second plan is an *Outline Plan*, which is a management summary used to present the overall progress of the delivery to the SharePoint sponsor and other interested parties. This should show the stages, milestones, and other important activities needed for an overview.



Tip Always consider risk when developing your plans. For each stream of work, ask this question: "What are the risks of taking this approach?" If a significant risk is found, consider how the approach can be changed to avoid or reduce the risk.

The Detail Plan manages the business case and all associated documentation concerning the implementation of the SharePoint solution. It is a complete record of the delivery program, which describes the implementation of the solution, including the User Adoption planning. The Detail Plan includes four segments:

- **Envision** This segment includes performing the initial investigations, creating the business case, confirming the success criteria, and stating the high-level milestones for progress reporting.
- **Plan** This segment includes creating the team, building technical and user (business) requirements, confirming the design of the solution, and determining a User Adoption strategy (communications and training).
- **User Adoption** This segment includes the provision of communications, training, and education. It also includes the testing and validation tasks carried out by the users.
- **Build** This segment includes the tasks necessary to build and then operate (deliver and provide service for) the solution.



Note The User Adoption and Build segments are closely connected. For example, the Build segment includes tasks relating to the creation of test platforms, prototyping, and solution implementation, which will include testing. These must be validated by the users. Relevant User Adoption tasks, including testing, usage, training, and service delivery, comprise a very important area. User adoption planning is described in Chapter 4, "Preparing SharePoint solution User Adoption."

There is another segment, Closure, which relates to the official completion of the delivery and is validated by the success criteria detailed in the Envision segment. This segment is discussed in more detail in Chapter 11, "Managing workshops and closing the delivery program."

Figure 3-2 shows the format of the SharePoint delivery Detail Plan, including some high-level tasks. The dotted arrow lines show how the segments are connected. As stated, a key aspect of the Detail

Plan is the delivery schedule, which lists the work required to implement the solution and when it must be completed. You should lay out the Detail Plan and work closely with the needed delivery team members (including the sponsor and stakeholders) to map the relevant tasks to the solution and record them in a Gantt chart. Ensure that each task is assigned to one or more team members. The Detail Plan forms the basis for progress reporting and gets recorded in the Outline Plan.

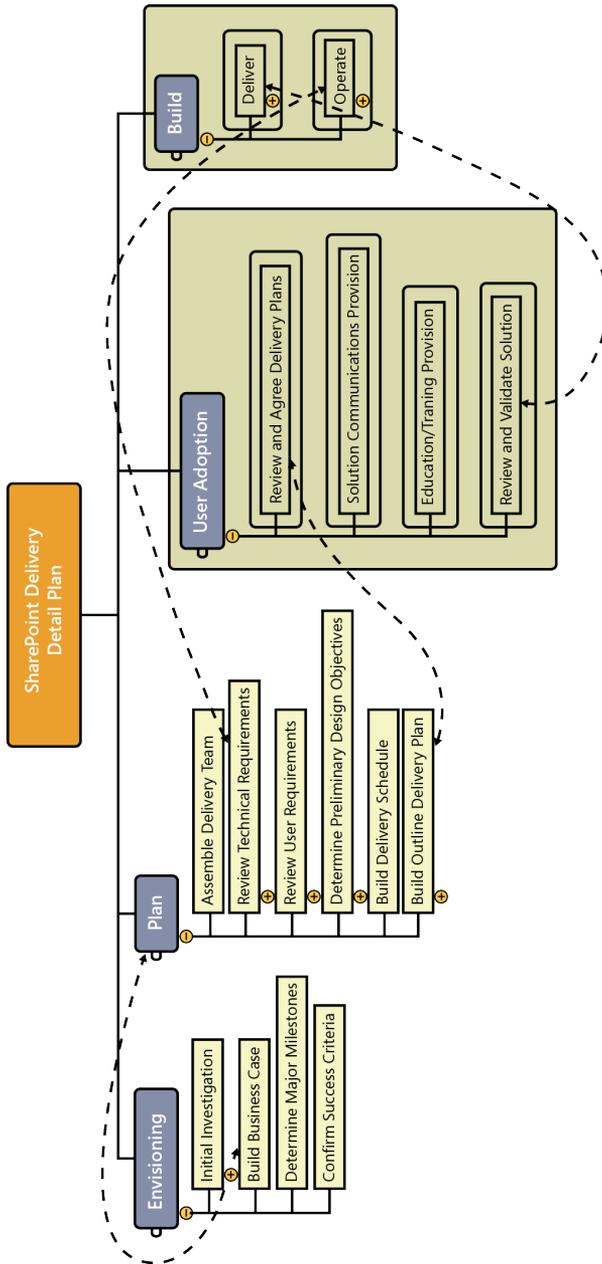


FIGURE 3-2 Format of a SharePoint Delivery Detail Plan.



More Info A fuller and expandable version of this map can be found at <http://www.sharepointgeoff.com/articles-2/sharepoint-delivery-detail-plan>.

You should ensure that there is a place to centralize the business case, delivery plans, and other documentation such as user requirements, issue logs, and risk logs. Use SharePoint to accomplish this. The delivery team could use a SharePoint site as a central location for all its activities; the site also acts as a showcase to sponsors and stakeholders, and of course, it also can be used to record delivery progress.

Taking this idea further, here is a scenario depicting the implementation of an app to a SharePoint site:

Scenario 2: Fabrikam wants to implement an app into its SharePoint environment. The company has enlisted a delivery manager, who has created a small team to help deliver the solution. The delivery manager wants to use a SharePoint site to contain the Detail Plan, so he would have a central place to manage high-level tasks in the delivery schedule. The SharePoint site also would be used to keep related documents and contact details for the team. The tasks stored in the site would be assigned to team members, as is any relevant documentation to be managed.

Figures 3-3 and 3-4 depict an example of how Fabrikam could have used SharePoint components to help manage the delivery program as described in Scenario 2. Figure 3-3 shows an example of a SharePoint 2013 site using the built-in Deliverables app, and it also illustrates the Detail Plan relevant to implementation of a SharePoint solution.

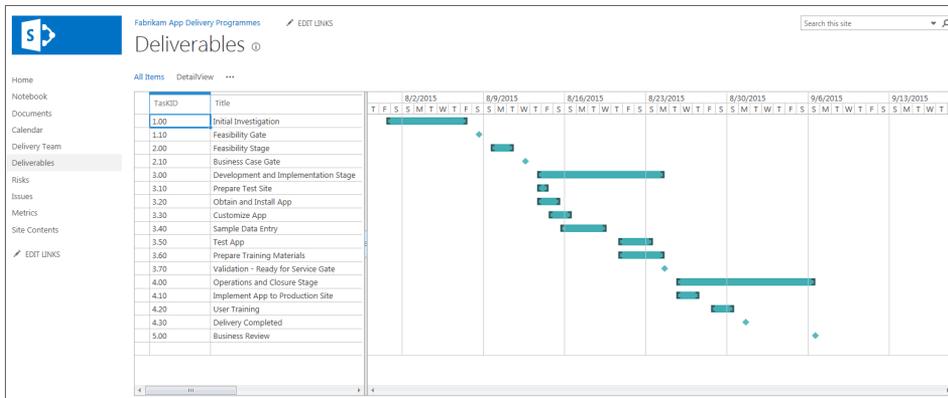


FIGURE 3-3 The Deliverables app in SharePoint.

Figure 3-4 shows the Detail Plan as a task list. Note that two extra columns have been added: an Accountability column, which shows the contact accountable to the task; and the Related Document column, which is bound to content stored in a documents library, showing the title of the document related to the task. Figure 3-5 shows the contacts list, which is bound to the task list as the Accountability column.

Deliverables Detail

[+ new item](#)

All Items DetailView ...

| Title | Deliverable Start | Deliverable Finish | Accountability | Related Document |
|--------------------------------------|-------------------|--------------------|------------------------------------------------|-----------------------------|
| Initial Investigation | 8/1/2015 | 8/8/2015 | Christian Petculescu | Concept Study |
| Feasibility Gate | 8/9/2015 | 8/9/2015 | Christian Petculescu; Adam Carter | |
| Feasibility Stage | 8/10/2015 | 8/12/2015 | Jenny Liu; Sharif Mograbi | Fabrikam Case Analysis |
| Business Case Gate | 8/13/2015 | 8/13/2015 | Adam Carter; Christian Petculescu | |
| Development and Implementation Stage | 8/14/2015 | 8/25/2015 | Christian Petculescu | Implementation Presentation |
| Prepare Test Site | 8/14/2015 | 8/15/2015 | Sharif Mograbi | |
| Obtain and Install App | 8/14/2015 | 8/16/2015 | Sharif Mograbi | Acquisition Plan Review |
| Customize App | 8/15/2015 | 8/17/2015 | Sharif Mograbi | |
| Sample Data Entry | 8/16/2015 | 8/20/2015 | Lisa Miller | |
| Test App | 8/21/2015 | 8/24/2015 | Lisa Miller | |
| Prepare Training Materials | 8/21/2015 | 8/25/2015 | Jenny Liu | |
| Validation - Ready for Service Gate | 8/25/2015 | 8/25/2015 | Adam Carter | |
| Operations and Closure Stage | 8/26/2015 | 9/7/2015 | Christian Petculescu | Information Management |
| Implement App to Production Site | 8/26/2015 | 8/28/2015 | Sharif Mograbi | |
| User Training | 8/29/2015 | 8/31/2015 | Guy Gilbert; Jenny Liu; Hani Loza; Lisa Miller | |
| Delivery Completed | 9/1/2015 | 9/1/2015 | Adam Carter | |
| Business Review | 9/7/2015 | 9/7/2015 | Adam Carter; Christian Petculescu | |

FIGURE 3-4 An example of a high-level task list from the Deliverables component in SharePoint.

Delivery Team

[+ new item or edit this list](#)

All contacts ...

| Full Name | Job Title | Business Phone | Email Address |
|----------------------|-------------------|----------------|------------------------------------------------------------------------------------------|
| Adam Carter | Sponsor | 555-0101 | Adam.Carter@fabrikam.com |
| Guy Gilbert | Business User | 555-0102 | Guy.Gilbert@fabrikam.com |
| Jenny Liu | Business Analyst | 555-0103 | Jenny.Liu@fabrikam.com |
| Hani Loza | Business User | 555-0104 | Hani.Loza@fabrikam.com |
| Lisa Miller | Business User | 555-0105 | Lisa.Miller@fabrikam.com |
| Sharif Mograbi | Technical Support | 555 0106 | Sharif.Mograbi@fabrikam.com |
| Danni Ortman | Business User | 555-0107 | Danni.Ortman@fabrikam.com |
| Christian Petculescu | Delivery Manager | 555-0108 | Christian.Petculescu@fabrikam.com |

FIGURE 3-5 A sample delivery team list has been created using the Contacts app in SharePoint.

Using SharePoint to build the delivery plan, contacts, and documents is a great way to help ensure that information is centralized. There are other benefits, too, particularly in aiding early User Adoption to business members who have access to the site and implementing solution apps for SharePoint sites. For example, the solution app could be deployed to a subsite of the delivery team’s SharePoint site and demonstrated there, and then the results could be captured to a list that can aid the business review at the closure of the delivery program.

As previously described, the solution delivery schedule is required to identify the tasks to be achieved, including information about those tasks (for example, who will be doing those tasks and the time frame in which they should be completed).



Note The delivery schedule is a high-level set of tasks structured by break points. Each break point represents a place where the relevant set of tasks can be reviewed and progress updated.

See Also More information concerning building the detail and outline schedule is in Chapter 9 “Controlling the delivery program”, section “Create a delivery schedule.”

As already has been pointed out, each task in the delivery schedule must contain a set of associated information. The details of delivery plan structure are given in Table 3-2. When you’re building the delivery program schedule from the Detail Plan, perform a review of work required. Some parts of the delivery program will form *Work Packages* in their own right. For example, an element of the Detail Plan could be to configure Search. This could have a number of subtasks, like obtaining service accounts, defining the scopes, and identifying crawl rules.

TABLE 3-2 Structure of a Delivery Plan

| Items to include in the Delivery Plan | Description |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Stages | Stages represent the natural high-level break points in the program life cycle. Examples include Initial Investigation, Feasibility, Development, Implementation, Operation, and Closure. |
| Work Packages | Work Packages represent the clusters of work within each Stage, focused on a key deliverable. For example, one Work Package could be the customization of a SharePoint app to meet user requirements. Another could be the testing of that app by selected business users (who are also part of the delivery team). |
| Activities | Activities are the individual components of work within the Work Packages that must be undertaken to complete the project. Each Activity should be defined in terms of its start and end dates and the name of the individual accountable for its completion. |
| Accountability | A single, specific person should be accountable for every Activity and Work Package in the delivery program. |

| Items to include in the Delivery Plan | Description |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Milestones | Milestones are significant events (often representing gates at the start of a Stage) that should be used to monitor progress as a summary. |
| Deliverables | Each of the key Deliverables defined in the program should be shown in the plan (indicated in the business case). |
| Reviews | Include Reviews at key points throughout the program when progress and performance can be evaluated. This is particularly important for the Validation portion of the program, where the solution has been made available to the business users for testing. |
| Interdependencies | All inputs from (and outputs to) other programs must be explicitly shown. This is very important for cross-related programs. For example, in the implementation of a SharePoint farm, there could be related programs of work from various work streams; there could be one centralized delivery schedule with all work streams connected to that schedule. |
| Costs | Using the delivery program, include Costs for materials and resources against each Work Package. At the end of each Review, outline the costs for delivering the Stage as part of the outline plan that summarizes progress. |

Defining controls to manage SharePoint solution delivery

As the SharePoint solution delivery program is being designed, build in controls that manage communication and authorization. Without mechanisms to ensure that there are reviews, reporting, authorization for changes, and managing documentation, there will be miscommunication and misalignment with goals. The result in many cases would be that the solution program gets dropped or withheld indefinitely, or it runs into a cycle of noncompletion (because the scope has not been reviewed and then confirmed, for example).

Therefore, once the delivery program has been defined and a schedule set, you must ensure that other organizational aspects of the program are addressed. These areas should be detailed in the SharePoint business case, as discussed next.

Ascertaining progress reporting needs

You must periodically update the sponsor (and members of the delivery team, as necessary) on the progress of the SharePoint solution implementation. To do this, you should first agree with the sponsor how reporting should be performed and the mechanisms used to do so. For example, you could use the delivery schedule in SharePoint to send out email notifications when a particular task is completed. There are other methods of progress reporting as well. You could summarize progress on a page on the SharePoint site and have that available for viewing, or provide a report based on a template that is provided from a Reports document library. For the purpose of standardization, choose one method of progress reporting. The key is to attempt to centralize reporting and to make things as easy as possible for those who need to access the progress reports. The last thing you need is the sponsor not reading the progress reports or assuming things about the delivery, which could

well happen if progress reporting has not been defined or agreed upon. Once agreement has been reached, record the reporting requirements in the Outline Plan.

As delivery manager, you are responsible for controlling the delivery and taking the necessary actions to ensure that the solution is delivered to the expected outputs (that is, the business requirements). This means guiding and coordinating team tasks. You should make sure that the delivery team meets regularly to check the progress of the relevant tasks and to forecast other tasks to be performed in the future. You should also assess the issues that arise and mitigate any risks of tasks not completing on schedule. In my experience, the best way to assess issues and collate progress reports quickly is to request a brief progress or checkpoint report from each of the team members. You can gather this detail by recording the details in a SharePoint task list, which can then be linked back to the Deliverables app (previously shown in Figure 3-3).

By using the SharePoint tasks list, reporting progress can be captured for each task (see the Task list app example in Figure 3-4). That could then be used to add detail to a weekly report. Alternatives to this approach include creating a SharePoint custom list that holds the reports. Figure 3-6 shows an example where the SharePoint Task list app has been connected to the Deliverables app so that further detail of a high-level task can be captured, and progress of the related task recorded.



More Info More information concerning progress reporting is in Chapter 9 “Controlling the delivery program”, section “Create Schedule Reports”

Identifying who can authorize changes

Typically, the only individual who can make changes to a solution delivery program is the SharePoint sponsor. However, the SharePoint sponsor could choose another individual close to the delivery program to authorize changes on his or her behalf. You must ensure that the details of how to contact those who can authorize changes is recorded. When changes come—and they will—make sure that they are critically reviewed to ensure that they do not affect the delivery scope. Whether there is a change in scope or not, there may be further ripple effects down the line; alterations may require further review to ascertain any risks, issues, and dependencies. For example, if the task is to build a SharePoint site that houses a customized app, and then it is expanded to include building another app, this change needs to be scheduled and resourced, and any issues concerning support, maintenance, and training need to be considered as well. Therefore, reviewing each change and seeking approval for it is vital. The impact of getting a solution delivery wrong due to lack of getting approval or failing to record the reasons why the approval was required could lead to User Adoption issues, both during and after delivery.

Keeping the stakeholders informed

Good communication leads to User Adoption, as does keeping the users informed and enthusiastic about the implementation of a SharePoint solution. There will invariably be changes concerning the SharePoint solution as it is being designed, built, and implemented. Changes in requirements can be

rapid and unpredictable—even the organization can change focus and priorities, which can affect the progress (or even the need) for a project. You should have regular points of review to ensure that what is being provided continually meets user requirements. The reviews need to be formal since they involve making and recording decisions. These reviews should be built into the delivery schedule, and those attending should include both delivery team members who are accountable for the relevant tasks leading up to the review and the stakeholders.

| Title | Deliverable Start | Deliverable Finish | Accountability | Related Document | Related Tasks |
|--------------------------------------|-------------------|--------------------|----------------------------------|-----------------------------|----------------------------------------------------|
| Initial Investigation | 01/08/2015 | 08/08/2015 | Cristian Petculescu | Concept Study | |
| Feasibility Gate | 09/08/2015 | 09/08/2015 | Cristian Petculescu; Adam Carter | | |
| Feasibility Stage | 10/08/2015 | 12/08/2015 | Jenny Liu; Shari Mograbi | Fabrikam Case Analysis | |
| Business Case Gate | 13/08/2015 | 13/08/2015 | Adam Carter; Cristian Petculescu | | |
| Development and Implementation Stage | 14/08/2015 | 25/08/2015 | Cristian Petculescu | Implementation Presentation | |
| Prepare Test Site | 14/08/2015 | 15/08/2015 | Shari Mograbi | Information Management | Backup Existing Site; Prepare Test Site Components |
| Obtain and Install App | 14/08/2015 | 16/08/2015 | Shari Mograbi | Acquisition Plan Review | |
| Customize App | 15/08/2015 | 17/08/2015 | Shari Mograbi | | |
| Sample Data Entry | 16/08/2015 | 20/08/2015 | Lisa Miller | | |
| Test App | 21/08/2015 | 24/08/2015 | Lisa Miller | | |
| Prepare Training Materials | 21/08/2015 | 25/08/2015 | Jenny Liu | | |

FIGURE 3-6 An example of a Task List app connected to the Deliverables app in SharePoint.

Documenting your SharePoint implementation

There will be a lot of documentation as you work on your SharePoint solution. You will need to centralize all of it because each SharePoint solution is a historical (and auditable) event in the evolution of the software’s use in the organization. Creating a structured method of recording the schedule, maintaining tasks, and monitoring progress, costs, issues, and risks (and in fact, any communication concerning the delivery of a SharePoint solution) is vital. For example, if a change is required to a solution one year after it has been implemented, then having the original documentation of the implementation of that solution is crucial. Do not simply rely on placing a copy of the solution into an inventory as a record of implementation. SharePoint gets updated, sites receive new content and design, technology evolves, and business requirements change. That means you have to know not only what solutions have been deployed, but also how those solutions were implemented and who was involved in doing that. As previously mentioned in this chapter, consider creating a SharePoint site as a delivery program site to store and manage everything.

There will be a lot of documentation as you work on your SharePoint solution. You will need to centralize all of it because each SharePoint solution is a historical (and auditable) event in the evolution of the software's use in the organization. Creating a structured method of recording the schedule, maintaining tasks, and monitoring progress, costs, issues, and risks (and in fact, any communication concerning the delivery of a SharePoint solution) is vital. For example, if a change is required to a solution one year after it has been implemented, then having the original documentation concerning the implementation of that solution is crucial. Do not simply rely on placing a copy of the solution in an inventory as a record of implementation. SharePoint gets updated, sites receive new content and design, technology evolves, and business requirements change. That means that you have to know not only what solutions have been deployed, but also how those solutions were implemented and who was involved in doing that. As previously mentioned in this chapter, consider creating a SharePoint site as a delivery program site to store and manage everything.

Here is a case in point from a SharePoint consultant:

I worked with a financial corporation in America that had *many* employees and documentation for over 1,000 apps housed in the World Trade Center when it was destroyed on 9/11. They lost all their people and all *that* documentation on that one day. It cost them millions of dollars to migrate the apps to SharePoint because they had not originally stored configuration records about the apps.

—Bill Pitts, director, Portals and Collaboration, Salient6, Inc.

Establishing controls for SharePoint solution delivery

The path to implementing a SharePoint solution successfully is based on the structure and management of the controls applied to delivering that solution. All too often, SharePoint solution delivery programs fail because no control was established from the very beginning. If no control is assigned to the program, then any policies oriented to the solution after its implementation will fail. You can use the checklist in Table 3-3 to ensure that the solutions delivery plan has controls in place.

TABLE 3-3 Controls checklist for SharePoint solution delivery

| Control | Description |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create a mechanism to capture delivery program content. | Places the various SharePoint 2013 repositories, such as the Document Libraries app and the Task List app, in a central site, which will be for the sole use of the delivery team. |
| Set up progress reporting formats (applications and templates) and reporting lines (a list of those who should receive the reports). | Uses SharePoint lists to record reports. Provides easy access to those who need to receive the reports. |
| Create a mechanism to capture and mitigate risks that could affect the ability to deliver the solution. | Creates a SharePoint list to record risks. Customizes the list to include risk mitigation information and status. |
| Create a mechanism to capture and manage issues to resolution. | Creates a SharePoint list to record issues. Using the issue-tracking app in SharePoint 2013 allows you to customize the list to include references to delivery program content (among other elements). |

| Control | Description |
|------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create a mechanism to capture changes to any aspect of the delivery program, including approval processes. | Creates a SharePoint list to record changes. Customizes the list to refer to delivery program content. Uses built-in workflow functionality so that approval of changes can be managed. |



Tip SharePoint 2013 has several built-in apps that allow you to capture and manage tasks, changes, contacts, risks, issues, and schedules. Built-in workflows allow the approval of content in those lists. In addition, SharePoint 2013 includes a feature called Project Web App Connectivity, which provides the lists required within a project site for integration with Project Web App, including issues, risks, and deliverables. Project Web App Connectivity is available in Office 365. However, for On-Premise SharePoint, Project Server 2013 is a prerequisite. For more information, visit <http://office.microsoft.com/en-us/project-server-help/whats-new-in-project-web-app-for-microsoft-project-server-2013-HA102848108.aspx> and <http://technet.microsoft.com/en-us/library/cc303399.aspx>.

Engaging your sponsor and stakeholders

As already mentioned in previous chapters, stakeholders are those affected by the delivery program. A SharePoint sponsor is a manager or executive who acts as a visionary. He or she is advised by the delivery manager of the SharePoint delivery program and can articulate how the SharePoint can meet the solution requirements. Both are stakeholders, as they are both on the delivery team. However, there are also people who take no direct part in the delivery program as team members, but whose activities will be changed in some way as a result.

When releasing SharePoint as a solution, where the implementation of the platform into an organization is required, the number of individuals affected could be significant. Therefore, you must identify stakeholders and their *power* (that is, are they decision makers, influencers, or require consent?), so that they can be enrolled in the delivery program at an early stage. This is done to ensure that stakeholder power does not cause the delivery to fail later. You should always have a backup plan in case your stakeholders use their power to undermine your delivery plans.

Scenario 3: Fabrikam is implementing a SharePoint solution that is a system to automate its sales process by automatically emailing documents marked as Sales. Following an investigation, the suggested procedure is to provide an extra option in all document libraries that is a component of the SharePoint solution. The functionality will be implemented as a new button in a SharePoint document library. Heading the delivery team is a SharePoint-savvy business manager who believes in a top-down approach and wields significant power in determining the shape of the solution. Believing that the only users are from the Sales department, he communicates with that department directly. Some weeks later, the solution is deployed across the entire company and into all SharePoint document libraries and all sites. Calls come streaming into the IT help desk from confused and dissatisfied users. The callers are asking questions like, "What is this button in my library?" "Why were we not informed about all this?" "How do I use this new doohickey?" and "My library is much

slower—is it because of this new button?” As a result, the solution is removed, pending further investigation. The solution has yet to be implemented because the time frame to deploy the solution has passed, and the business has moved on to other challenges.

This scenario describes a typical problem when you implement a solution without taking stakeholder power and identification into account. If stakeholders are not involved in the development of the solution, the outcome can be disastrous, resulting in wasted effort, time, and money.

The delivery manager and the SharePoint sponsor must ensure that all stakeholders are adequately briefed on the solution being implemented. Care must be taken concerning the level of communication provided. Too much data will drown them, but not enough will mean that users will not give the delivery the level of priority that the delivery program team wants.

Enrolling stakeholders, and keeping them engaged, are taxing but essential tasks. You accomplish them by both a formal communication plan and by “enrolling behavior” on behalf of all the delivery team on a planned and opportunistic basis.

Stakeholders make up a vital part of the User Adoption process. By encouraging stakeholders to become “SharePoint champions,” they become warriors on behalf of the cause, helping users come to grips with new SharePoint solutions and, in turn, helping SharePoint evolve. They also are critical to the creation of policies related to platform Governance of solutions that have been implemented going forward.

Stakeholders need to be identified as part of the initial investigation into building the business case. There are three kinds of stakeholders:

- Those who have a positive attitude toward the delivery program
- Those who have a negative attitude toward the delivery program
- Those who are not committed one way or the other

For each stakeholder or group of stakeholders, consider the following questions:

- Do they play a decision-making role in the delivery program?
- Can they exert influence (positive or negative)?
- Is their consent required for the delivery program to succeed?



Tip Build a stakeholder map (described in Figure 3-7 later in this chapter) to help you gauge who is positive, negative, and noncommittal.

Now consider the following scenario:

Scenario 4: Fabrikam needs to implement a SharePoint solution that will affect the entire organization. The SharePoint sponsor says that contact should be made with the customer director, who manages a team responsible for the areas of the company most affected by the new solution. His consent will be required to gain access to his team members. The team members are potential users

of the new SharePoint solution. The chief executive has informed the SharePoint sponsor that two additional people, Phil and Jim, could be used to influence the customer director's consent and act as SharePoint champions. After further investigation, the delivery manager discovers that Phil works with the customer director, Jim is a key member of the engineering team under the engineering director, and that a significant number of potential stakeholders are involved. Therefore, the delivery manager and SharePoint sponsor create a Stakeholder influence map, which is updated some more after discussions with each of the potential stakeholders.

The diagram in Figure 3-7 shows the connections between the identified stakeholders and identifies who is a decision maker, an influencer, someone whose consent is required, or those who must be targeted for User Adoption planning. The plus and minus signs, zeroes, and exclamation points shown with each stakeholder indicate whether that person is positive, negative, or noncommittal, or whose attitude is unknown. In Figure 3-7, which shows an example SharePoint delivery stakeholder map, Phil is indicated as a "feed" to the customer director, and Jim is indicated as a "feed" to the engineering employees.

You should consider a stakeholder map a useful way to help build an initial business case; the map adds clarity to stakeholder communication, attitudes, and approval levels. However, stakeholders are not identified only so you can find out whether they will consent to or are positive about the delivery. Consider that point when engaging with stakeholders: either you will require information from them or they need to be influenced with respect to the delivery of the solution, and they might need a demonstration of how SharePoint would solve their information and management challenges.

Based on the type of communication that the stakeholders require, choose wisely the medium, timing, and the kind of consent required. Also, ensure that all stakeholder information is recorded in the plan, and tied to the relevant milestones concerning the release of the SharePoint solution.

In the "Building the SharePoint delivery plan" section earlier in this chapter, I suggested a method of using SharePoint to record and manage the delivery plan for the solution which was to construct a site whose sole purpose was to manage and communicate the delivery of the solution and progress. If you have such a site, consider providing the stakeholders with access to it. This will give team collaboration a major boost because that is where anything to do with the delivery program is located, including all reports and decision-making documentation.

Because SharePoint solution delivery is scheduled into segments (see the "Preparing a SharePoint delivery program" section earlier in this chapter), consider assigning decision-making stakeholders to the sign-off of the relevant gate at the end of each stage. As stated earlier, consent of stakeholders is not the only thing required—you also need to get their approval of a solution that will meet their (and their relevant users') needs.

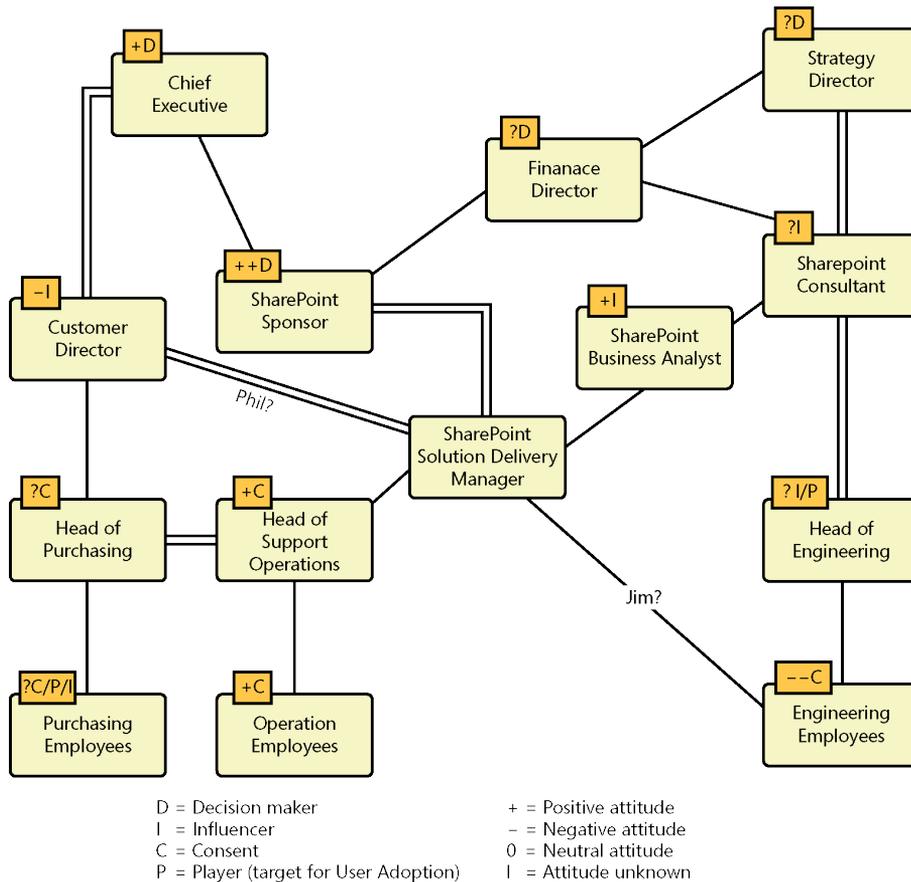


FIGURE 3-7 An example of a SharePoint delivery stakeholder map.

Summary

This chapter described how you can build a SharePoint delivery program, which entails setting up the delivery team, creating a delivery plan, and managing the stakeholders. The creation of this program is vital, as it details exactly how a solution will be implemented and contains success criteria that are crucial to User Adoption. The complexity of the program relates directly to a combination of elements: reach of the solution across the organization, number of stakeholders involved, importance to the organization as a whole, and the culture of the organization where the solution is going to be delivered.

The next chapter develops the discussion of the delivery program further. The text delves into what is required to prepare User Adoption and looks at methods to engage the SharePoint audience. Other topics covered include building cases for SharePoint solutions with user input in mind, ensuring that there are ongoing, two-way communications between those responsible for supporting SharePoint and business users engaged in using the solutions provided, and building training models to get users comfortable with using the implemented solutions.

Index

A

- Aalto, Alvar, 31
- Acceptable User policy (mobile device use), 156
- Access
 - Access Services, 37
 - SharePoint features, 10
- access control, SharePoint production and user acceptance platforms, 302
- Access Rights policy, 160
- access to content, 4
- accountability, assigning in delivery program, 56
 - Accountability section (delivery plan), 61
 - example in Detail Plan, 59
- Acland, Simon, 202
- Active Directory, 221
 - information needed from team, 222
- Activities (delivery plan), 61
- actual costs, 277
- Additional Ideas and Resources, Communication Plan, 88
- administration
 - Admin subsite of SharePoint One-Stop Shop, 219
 - automated tools for, 220
- administrators, SharePoint, roles and responsibilities on delivery team, 200, 210
- Admin section of SharePoint One Stop-Shop, storing Operations Manual in, 306
- adopter types, 335
- adoption. *See* user adoption
- ADS (architectural design sessions), 202
 - contents and purposes of, 203
- Agile Requirements Change Management process, 297
- alert policy, 160
- Application Server, 185
- apps
 - built-in apps in SharePoint 2013, 66
 - cloud-hosted apps for SharePoint 2013 Off-Premise, 293
 - development, documentation, and books on, 297
 - emergence of, and users' preception of SharePoint development, 297
 - in SharePoint 2013, 20
 - new development model for SharePoint, 292
 - on-premise line-of-business (LOB) systems hosted in external systems, 289
 - provisioning from app store, steips in process, 289
 - requested actions in delivery of SharePoint solution, 52
 - security implications of use of, 299
 - SharePoint app customizations available from Office Marketplace, 289
 - SharePoint policies concerning mobile device apps, 157
- Apps model, 288
- architectural design sessions (ADS), 202
 - contents and purposes of, 203
- attainable goals (S.M.A.R.T.), 15
- audiences
 - for training, 143
 - in SharePoint workshops, importance of knowing, 314
 - knowing your target market and focusing communications, 90
 - Search and Audience section, user requirements document, 36
 - Targeted Audiences section of Communication Plan, 88
- auditing
 - auditing policy, 159
 - audits relating to business processes, 23
 - built-in analytics and auditing reports, 149
- Audit Log Reports, 149
 - activities tracked by, 151
 - list of available reports in SharePoint 2013, 150

authorization, identifying who can change, in delivery planning

- questions to consider when creating, 151
- authorization, identifying who can change, in
 - delivery planning, 63
- availability, 133, 192
 - Availability section in Statement of Operations, 161
 - mitigating risk in, 135
 - SharePoint service delivery and, 231
 - ensuring availability, 256

B

- Background and Context section, Communication Plan, 86
- bar charts, 269
- base estimate, cost plan/forecast, 276
- baseline provided by delivery plan, 164
- BCM (Business Continuity Management), 256
- behavioral changes to solve business problems, 5
- benefit, cost, and time model
 - example of, 166
 - using to gauge adverse changes to delivery program, 165
- benefits
 - key benefits of SharePoint as described by Microsoft, 6
 - measurable, creating, 6–7
 - ensuring SharePoint delivery program is legitimate, 7
 - estimating costs, 14
 - estimating demand for SharePoint solution, 11–13
 - forecasting user adoption benefits, 10
 - measuring SharePoint benefits, 9
 - non-financial benefits of SharePoint, 8
 - pricing, 13
 - scenarios for identifying benefits, 6
 - setting conditions for delivery program satisfaction, 10
 - of SharePoint 2013, 51
 - Best Practices Checklist, Communication Plan, 89
- Blogging feature of Word, 83
- brainstorming, 33
 - techniques for, 315
- Branding and Design policy, 160
- bring your own device (BYOD)
 - Mobile Services in SharePoint 2013, 39
 - planning for, 122–124
 - SharePoint governance and, 151–158
- browsers
 - mobile device, policies for, 156
 - to be supported by SharePoint platform, 136
- budget for SharePoint solution delivery program, 310
- Build (business driver), 94
- Build section of Detail Plan (delivery plan), 57
- built-in features, investigation of, 288
- business agreement, questions addressed in workshops, 310
- business analysis, tying to SharePoint features, 30–44
 - building user requirements document, 35–39
 - differences in planning on-premise versus online solutions, 40–42
 - factors determining success of SharePoint delivery program, 42–44
- business analysts, 33
 - delivery team roles and responsibilities, 199, 205
 - program tasks, 206
 - support by information architect, 209
- business analytics, 139
- business case for SharePoint
 - components of, 10
 - contents of and reasons for building, 20
 - delivery business case contents, 45–46
 - identifying shareholders, 67
 - in Detail Plan (delivery plan), 57
- Business Connectivity Services, 38
- business continuity
 - levels to be supported via OLA or SLA levels, 136
 - planning, 133
- Business Continuity Management (BCM), 256
- business critical data, harvesting, 95
- business culture
 - reviewing to build user adoption strategy, 72
 - understanding, crucial nature of, 73
 - understanding of sponsors and, 78
- business-focused delivery of SharePoint solution, 22
- business needs, standardizing, 94–96
 - key business drivers for SharePoint solutions, 94
- business processes
 - audits of, 23
 - business process rules of a SharePoint solution, 128
 - SharePoint solution delivery, 337
- business requirements
 - changes in, 164
 - responsibility of business analyst on delivery team, 206

- satisfying, SharePoint customization and, 286
- solutions architect's responsibilities for, 212
- unclear or undefined for solution, 80
- business review meetings, 330
- business rules
 - building for customized solutions, 290
 - creating, 140–142
 - key points to consider, 142
 - for SharePoint support services, 241
 - importance for user adoption, 139
 - on level of SharePoint support, 329
- business sponsor. *See* sponsor for SharePoint
- business strategy
 - SharePoint support for, 2
 - SharePoint, using SALEM process, 16
- BYOD. *See* bring your own device

C

- capabilities
 - of the support team, 234
 - SharePoint service delivery, 230
- capacity, 133
- capacity risk analysis, 257
- cash flow, benefits of SharePoint for, 7
- CBT (computer-based training), 332
- Central Administration, 190
- centrally hosted development environment, 294
 - diagram of, 295
- central site supporting many branch offices,
 - SharePoint solution for, 181
- certification programs, 333
- certifications available for IT professionals in
 - SharePoint 2013, 148
- challenges
 - and SharePoint goals for, 3
 - in information management, 4
- champions (SharePoint)
 - creating, 91–94
 - formation of champions group, 135
 - identifying, 335
- change
 - bringing about in users, 335
 - connection with risks and issues in delivery
 - programs, 278
- change logs, 166
 - example of, 167
- change management
 - built-in apps for, 66
 - change control in platform governance, 135

- defined, 164
 - proof of following change management
 - process, 297
- change proposals, handling of, 166
- Channels and Tactics section, Communication
 - Plan, 89
- channels for training, 145
- classroom training, 332
- client applications used with SharePoint, 234
- client operating systems, direct SharePoint
 - installation on, 292
- client-related services, 185
- clients
 - client vision and strategy, 10
 - establishing good protocols for interviewing, 338
 - requirements, obtaining real agreement on, 338
- closure of SharePoint delivery programs, 320–326
 - creating closure checklist, 320–322
 - questions to answer when considering
 - closure, 321
 - creating closure report, 323–325
 - closure actions and communication, 325
 - formal closure of delivery programs, 324
 - topics to cover, 323
- cloud
 - benefits of using, 27
 - cloud-hosting companies, offering Infrastructure
 - as a Service (IaaS), 293
 - cloud services for businesses, IT departments
 - and, 134
 - defining or explaining, 27
 - versus on-premise solutions, 257–259
- Cloud Control Matrix, 256
- cloud-hosted development environment, 295
 - diagram of, 296
- CloudShare, 293
- collaboration
 - challenges within an organization, 3
 - choosing tools that match business goals, 42
 - examining collaborative scenarios, 335
 - requirements for, meeting with built-in
 - SharePoint features, 288
- collaboration services, 139
- collaborative ownership, building, 96–98
- commercial objectives, and costs of SharePoint
 - delivery, 13
- committed costs, 277
- Communication Objectives section, Communication
 - Plan, 89

communication plans

- communication plans
 - additional information on, 91
 - aiding sponsor in building, 80
 - building
 - actions for each section, 87–89
 - format of SharePoint tactical Communication Plan, 86
 - preliminary actions, 85
 - developing, 84–91
 - for user adoption, promoting awareness of solution, 76
 - importance of, 92
- communications
 - and training, key aspects in user adoption, 5
 - at program closure, 325
 - creating and maintaining communications plan, 336
 - for user adoption and governance, 336
 - roles and responsibilities of delivery team, 199, 224
 - support service's communication with customers, 251–253
 - practical techniques for, 253
 - sources of communication, 253
- community mission, 73
- Community sites and portals, 83
 - Community Portal Template, 93
 - Community Sites, 101
- competitor experience, using to gauge demand for SharePoint solutions, 12
- compliance and legal implications of SharePoint service delivery, 255–257
- computer-based training (CBT), 332
- conditions for satisfaction, SharePoint delivery program, 10
- conducting workshops, 312–314
 - after the workshop, 314
 - at the workshop, 313
 - before the workshop, 312
 - brainstorming, 315
 - importance of listening and knowing your audience, 314
- connected components, 234
- constraints, necessary or externally imposed, 7
- consultants
 - interfaces of delivery team with outside consultants, 223
 - use of, and failures or SharePoint solution delivery, 31
- consulting services, 53
- consumerization of IT. *See also* IT consumerization
 - governance
 - in relation to SharePoint, 153
- consumer-oriented social networking, learning from, 42
- contacts
 - built-in apps for managing, 66
 - contact list use policy, 160
 - Contacts app for delivery team, 60
 - for communication planning, 86
- content
 - classification of, 138
 - Content and Metadata section, user requirements document, 36
 - Content databases, 185
 - content design and data management, 138
 - content leaders, 32
 - content middleware, 139
 - content types, organizing enterprise content into, 170
 - helping user find, 43
 - lifecycle of, 170
 - migration of right content from existing systems, 43
 - presentation and access services, 138
- content growth rate dashboard, 219
- content management, 38
 - clarification in SharePoint governance framework, 138
 - content management policy, 159
 - SharePoint service delivery and, 255
- Content Management Systems (CMSs), lack of security definitions and policies, 256
- content strategists, 206
 - roles and responsibilities on delivery team, 199, 206
 - program tasks, 207
- contingency, cost plan/forecast, 276
- controlling work in support services, 246–251
 - ideas for generating proactivity in support services, 246
 - sample flowchart for managing customer queries, 250
- costs
 - application of financial management to delivery program, 276
 - awareness of hidden costs, 43
 - benefit, cost, and time model to gauge changes in delivery program, 165
 - benefits of SharePoint relating to, 7

- Costs in delivery plan, 62
- delivery schedule and, 262
- estimating for SharePoint solution, 14
- estimation of soft and hard costs for delivery program, 277
- factors influencing costs for SharePoint delivery program, 276
- of SharePoint delivery, 13
- over the life of a SharePoint delivery program, 274
- project management solution figures, 115
- recording actual costs and committed costs, 277
- Covey, Stephen, 24
- cross-functional collaboration and workflow with LOB data, 95
- cross-functional delivery teams, 53
- customer charging policy, 14
- customers
 - identifying when creating support service, 235–238
 - example of customer map, 238
 - importance or priority level of customers, 237
 - practical techniques for, 237
 - SharePoint service delivery and, 230
 - SharePoint support services communicating with, 251–253
- Customer Satisfaction Measures, 8
- customization and user adoption, 285–308
 - choosing correct resources to develop customized solution, 291
 - creating documentation for customized SharePoint solutions, 302–306
 - Operations Manual, 305
 - User Manual, 304
 - User Solution Specification document, 303
- deciding whether to customize SharePoint, 285–291
 - bad choices and knee-jerk reactions, 286
 - creasing customization policies to protect SharePoint platform, 291
 - decision points, 288
 - development decision flowchart, 287
 - using practical techniques to make decisions, 288–290
 - understanding governance impact, 299–302
 - understanding user adoption impact, 297–299
- customization policies, 160, 291

D

- dashboards
 - building, PerformancePoint Services tools for, 38
 - in performance management solutions, 11
- Database Server, 185
- data management, 137
 - requiring clarification in SharePoint governance, 138
- data storage policy, 160
- decisions on SharePoint customization, using practical techniques for, 288–290
- decommissioning guide, 134
- delegation and escalation channels for SharePoint support service, 237, 241
 - defining problem escalation, 242
- deliverables
 - Deliverables in delivery plan, 62
 - deliverables log, 270
 - from other programs, required by delivery program, 274
- Deliverables app, 59
 - example Task List app connected to, 64
- delivery detail plan
 - further information on, 264
 - steps to creating outline plan, 263
- delivery manager, 54
 - leadership skills, 202
 - roles and responsibilities on delivery team, 200, 211
 - program tasks, 211
 - responsibilities, 212
 - term of reference (TOR) for, 201
- delivery of SharePoint solution, planning, 51–70
 - actions that will be requested, 52
 - building the delivery plan, 57–62
 - delivery schedule, 61
 - Detail Plan, contents, 57
 - format of Detail Plan, 58
 - structure of a delivery plan, 61
 - using SharePoint, 61
 - using SharePoint components to manage delivery program, 59
 - controls to manage solution delivery, 62–66
 - ascertaining progress reporting needs, 62
 - authorization changes, 63
 - controls checklist for solution delivery, 65

delivery program

- documenting SharePoint implementation, 64
- keeping stakeholders informed, 63
- engaging sponsor and stakeholders, 66–69
 - delivery stakeholder map (example), 69
 - types of stakeholders and considerations, 67
- preparing a delivery program, 56
- setting up a delivery team, 52–56
 - types of delivery teams, 53
 - types of services to deliver and support solutions, 52
- typical delivery team's roles and hierarchy, 55
- delivery program, 21
 - building search strategy, 172–174
 - closure of, 320–326
 - controlling, 261–284
 - creating a delivery schedule, 261–265
 - managing finances, 274–278
 - managing risks and issues, 278–284
 - tracking and communicating progress, 265–273
 - understanding project interdependencies, 274
 - creating a delivery plan, 44–46
 - SharePoint delivery business case contents, 45–46
 - deployment documentation, 187–198
 - design constraints, 196
 - functional requirements, 188
 - human requirements, 191
 - integration and hardware testing, 197
 - interface requirements, 193
 - performance requirements, 189
 - platform overview, 188
 - system management requirements, 191
 - test requirements, 194–196
 - engaging the right people, 28
 - ensuring that it's legitimate, 7
 - guidelines for success, 42
 - importance of information architecture, 169–172
 - key messages concerning, 337–340
 - managing change in, 163–169
 - definition of change, 164
 - identifying players and roles in change, 167
 - levels for change management decisions, 169
 - scope creep, 165
 - sources of change, 164
 - stakeholders' roles, 167
 - techniques for formal approach to, 166
 - typical change management program, 168
 - using benefit, cost, and time model to gauge adverse changes, 165
 - need for platform deployment documentation, 182–184
 - preparing, reasons for, 56
 - scopes, 22
 - understanding geographical boundary implications, 174–182
 - understanding key SharePoint 2013 concepts, 184–187
 - availability, reliability, and maintenance, 192
 - SharePoint 2010 migration, 187
 - topology, 185–187
- delivery program scope, 20
- delivery program subsite (SharePoint One-Stop Shop), 220
- delivery resources, organizing, 199–228. *See also* delivery team
 - building the delivery team, 201–204
 - creating terms of reference, 200
 - interfaces, teams in the organization, 221–223
 - interfaces with outside consultants, 223
 - overview of delivery team, 199
 - SharePoint 2013 One-Stop Shop, 215–220
- delivery schedule, creating, 261–265
 - benefits to delivery team, 262
 - creating detailed schedule, 264
 - information contained in, 261
 - information in outline plan, 264
 - steps to create outline schedule, 263
- delivery team
 - building, 201–204
 - building effective team, 265
 - creating terms of reference for, 200
 - getting right people on board, 290
 - questions asked by, helping in building of Statement of Operations, 136
 - roles and responsibilities, 55, 199
 - understanding roles of, 205–226
 - business analyst, 205
 - communications, 224
 - content strategist, 206
 - information architect, 208
 - infrastructure specialist, 209
 - quality assurance, 224
 - SharePoint administrator, 210
 - SharePoint trainers, 225
 - solutions architect, 212
 - user interface designer, 226
 - web graphic designer, 207

- demand for SharePoint solution, estimating, 11–13
 - demonstrations and presentation sessions, 202, 204
 - dependencies
 - project interdependencies in delivery program, 274
 - showing on network diagram, 272
 - deployment documentation, 182–184, 187–198. *See also* delivery program, deployment documentation
 - situations requiring, 183
 - topics covered, 187
 - using planning worksheets for, 184
 - design constraints, 196
 - design decisions, 203
 - Detail Plan (delivery plan), 57
 - contents, 57
 - example plan, 59
 - format of, 58
 - DEV CLIENT, 293
 - Developer Dashboard, 190
 - developers. *See* SharePoint developers; web developers
 - development
 - decision flowchart, 287
 - development features for SharePoint 2013, ability to customize, 286
 - documentation and books on SharePoint 2013, 297
 - ensuring developer environment separation and ownership, 300
 - ensuring that system development life cycle is followed, 301
 - of customized SharePoint solution, 288
 - understanding governance impact of, 299–302
 - understanding impact on user adoption, 297–299
 - development environment
 - options for SharePoint 2013, 292–297
 - abbreviations in illustrations, 293
 - setup considerations, 293
 - SharePoint 2013 individually hosted environment, 294
 - separation from production, user acceptance, and test environments, 300
 - DEV ENVIRONMENT, 293
 - devices to be supported by SharePoint platform, 136
 - disaster recovery, 133, 256
 - Discover (business driver), 94
 - discovery (output of ADS sessions), 203
 - discussion board policy, 160
 - distributed administration, 137
 - documentation
 - creating for customized SharePoint solutions, 302–306
 - Operations Manual, 305
 - User Manual, 304
 - User Solution Specifications document, 302–304
 - of implementation of SharePoint solution, 64
 - platform deployment documentation, 182–184
 - document management system (DMS), replacing with SharePoint, 11
 - document sets, organizing content into, 170
 - drivers, words used in describing, 7
 - duplicate tools, eliminating, 44
- ## E
- early adopters, 74
 - traits of and strategies for, 75
 - early majority adopters, 74
 - traits of and strategies for, 75
 - economic mission, 73
 - Effective Messages section, Communication Plan, 86, 88
 - e-learning, 333
 - Elite, 202
 - email, goals for emailing content, 4
 - engagement summary sessions, 202, 204
 - engaging the right people
 - engaging sponsor and stakeholders in delivery planning, 66–69
 - in SharePoint solution scope definition and delivery, 28–30
 - tips for, 28
 - Enterprise Content Management tools, 170
 - Enterprise Search, 172
 - Enterprise Social, 101
 - envisioning (ADS sessions output), 203
 - Envision section of the SharePoint delivery detail plan
 - workshops, 310
 - escalation channels for support services, 237, 241
 - defining problem escalation, 242
 - Escalation section of Statement of Operations, 161
 - estimates
 - estimating demand for SharePoint solution, 11–13
 - examples of need for, 12

Excel Services

- techniques for, 11
- estimating costs for SharePoint solution, 14
- Excel Services, 37
- Exchange Server, 27, 221
 - information needed from team, 222
- expert opinion, gauging demand for SharePoint solution, 11
- external consultants, 223
- External Scan section, Communication Plan, 87
- external suppliers, effective partnerships with, 134
- external users, access to SharePoint, 136

F

- failure points, examining for SharePoint platform, 257
- failure rate, 192
- FAQs (frequently asked questions)
 - document for communication planning, 85
 - Ho Do I? area on SharePoint One-Stop Shop site, 218
- farms
 - creation of SharePoint farm, 52
 - relationships among, 184
- FAST (Functional Analysis Systems Technique), 117
- fault prevention, fault removal, and fault forecasting, 192
- Feasibility and Definition stage, 10
- feasibility studies, gauging demand for SharePoint solution, 11
- features
 - Features section, user requirement document, 36–39
 - knowing SharePoint features, 24–28
 - reasons for, 25
 - services in SharePoint 2010 and SharePoint 2013, 37
 - tying analysis to SharePoint features, 30–44
- finances
 - managing for delivery program, 274–278
 - applying financial management to delivery program, 276
 - recording actual costs and committed costs, 277
 - recording costs with schedules, 275
 - sample of costs over life of program, 275
- finance team, supporting, 134
- financial benefits of SharePoint, 7
 - overall benefit, 10

- finding content, 4
- first-line, second-line, and third-line levels of support, 241
- flow of calls into SharePoint support,
 - managing, 240–242
 - establishing a process of closing a query, 243
 - lines of support, 241
 - practical techniques for, 242
- forecasting user adoption benefits, 10
- formal closure of delivery programs, 324
- forms, InfoPath Forms Services, 37
- Framework section, Communication Plan, 88
- freeware apps, SharePoint support and, 298
- frequently asked questions. *See* FAQs
- Functional Analysis Systems Technique (FAST), 117
- functional requirements, 188
 - responsibility of business analyst on delivery team, 206

G

- Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers, 33
- gamification methods, using to motivate SharePoint champions, 92
- Gantt charts. *See* bar charts
- Gartner reports on offerings of key partners, 34
- GELISTALLSITES tool, 220
- geographical locations, describing for SharePoint support service, 234
- geographically dispersed federated service platform, 136
- geographic boundaries
 - SharePoint delivery provision for types of organizational scenarios, 180–182
 - understanding implications of SharePoint delivery provisions showing organizational scenarios, 180–182
 - solutions based on how user actions travel over WANs, 174–180
- goals
 - absence of clearly defined goals, 24
 - alignment of software with business goals, 24
 - business goals related to user adoption (example), 30
 - creating SharePoint S.M.A.R.T. goals, 15–16
 - badly written goal (example), 15
 - well-written goal (example), 16

- defined by business sponsor, not aligned with users' goals, 32
- understanding goal alignment and importance of user adoption, 17
- understanding SharePoint goals and requirements, 1–3
- using goal alignment methods, 3–6
 - process of goal alignment, 5
 - purpose of goal alignment, 4
- governance, 3, 47
 - business case and, 20
 - information about, on SharePoint 2013 One-Stop Shop, 216
 - more information on, 137
 - of SharePoint solution, 43
 - on-premises and cloud features, 28
 - planning for SharePoint, 127–162
 - building Statement of Operations, 158–161
 - creating business rules, 140–142
 - creating Governance Committee, 128–132
 - creating platform governance, 134–140
 - creating SharePoint service model, 132–134
 - creating SharePoint training program, 143–148
 - IT consumerization governance, 151–158
 - using Web Analytics and auditing, 149–151
 - sustaining, 329–331
 - meetings of Governance Committee, 330
 - understanding impacts of SharePoint 2013 development, 299–302
 - ensuring developer environment separation and ownership, 300
 - ensuring that system development life cycle is followed, 301
 - SharePoint Designer, provisioning to developers, 301
- Governance Committee, 330
 - creating, 128–132
 - assigning appropriate individuals, 130
 - strategy team, 131
 - tactical team, 132
- governing information, complexity of, 23
- government (state), SharePoint delivery provision for, 180
- Growth Rates area (SharePoint One-Stop Shop), 219

H

- hardware constraints, 196
- hardware testing, 197
- Health Analyzer, 190
 - use for testing, 195
- Heinlein, Robert, 25
- help desk, creating SharePoint site as, 243
 - communication with customers, 253
- higher-level measurement, 9
- host, listing for SharePoint in Statement of Operations, 158
- How Do I? area (SharePoint One-Stop Shop), 218
- human constraints, 196
- Hyper-V, 293

I

- IaaS (Infrastructure as a Service), 27, 293
 - hosting development environment in the cloud, 295
- image use policy, 160
- indexing needs for search, identifying, 173
- individually hosted development environment, 294
- InfoPath Forms Services, 37
- information architects
 - roles and responsibilities on delivery team, 199, 208
 - program tasks, 209
- information architecture
 - defined, 208
 - understanding and building strategy for, 81
 - understanding importance of, 169–172
 - application to SharePoint solution being delivered, 170
- information governance, 141
- information leaks from use of mobile devices, 156
- information management, challenges and SharePoint solutions, 4
- information management policies, deciding where they apply, 171
- Information Technology Infrastructure Library (ITIL), 248
- information workers, 32
 - becoming more technologically aware, 22
 - involvement in SharePoint support, 132
- infrastructure
 - and storage, clarification in SharePoint governance, 139
 - built by tactical team, 132

Infrastructure as a Service (IaaS)

- diagrams of SharePoint environment, 234
- requirements for SharePoint solution,
 - modeling, 13
 - review meetings, 330
- Infrastructure as a Service (IaaS), 27, 293
 - hosting development environment in the cloud, 295
- infrastructure specialists, roles and responsibilities on
 - delivery team, 199, 209
- innovators, 74
 - training and, 144
 - traits of and strategies for, 75
- Inputs section in Statement of Operations, 161
- installation, 134
- intangible benefits, 8
- integration, 134
- integration of SharePoint solution with other systems, 42
- integration testing, 197
- Interdependencies (delivery plan), 62
- interface customization, level for SharePoint platform, 136
- interface requirements, 193
- interfacing teams
 - in the organization, 221–223
 - outside consultants, 223
- Internal App Catalog, 21
- interviewing, establishing good protocols for, 338
- issues
 - built-in apps for managing, 66
 - connection with risks and change in delivery programs, 278
 - management model for, 135
 - managing in delivery programs, 282–284
 - addressing issues, 283
 - examples of issues, 282
 - issue log, 283
 - priority level of issues, 284
- IT consumerization governance, 151–158
 - creating policies for mobile device use, 156
 - getting users involved, 156
 - information leaks, 156
 - lost devices, 155
 - lost IP address, 155
 - patching of mobile devices, 156
 - security breaches, 155
- ITIL (Information Technology Infrastructure Library), 248
- IT-led SharePoint solutions, 20, 22

J

- jargon, overuse in business strategy, 2

K

- key links in Statement of Operations, 161
- Key Messages section, Communication Plan, 88
- KPIs (Key Performance Indicators), 8

L

- laggards, 74
 - removing barriers from, 335
 - traits of and strategies for, 75
- Landing page (SharePoint One-Stop Shop), 218
- languages, sites with different languages, 181
- large list throttling, 190
- late activities reports, 271
- late majority adopters, 74
 - traits of and strategies for, 75
- launching SharePoint support services, 238–240
 - practical techniques for, 239
- lead steward of Governance Committee, 130
- learning and knowledge experience, creating, 20–30
- legal implications of SharePoint service delivery, 255
- legal requirements for long-term data storage, 169
- licensing
 - Apps model and, 288
 - information resources on, 14
 - Office Store Standard Application License Terms, 300
- lines of business (LOBs)
 - identifying and finding leaders for SharePoint governance committee, 130
 - LOB connectivity, 95
- lines of support associated with SharePoint services model, 241
- links to key processes, procedures, and related documentation, 161
- listening, importance of, in SharePoint workshops, 314
- LOBs. *See* lines of business
- Logging Database, 190
- Logs area (SharePoint One-Stop Shop), 219
- lost devices, 155

M

- maintainability, 192
- maintaining SharePoint solutions, 327–340
 - sustaining governance, 329–331
 - sustaining SharePoint support, 327–329
 - sustaining user adoption, 331–336
- Manage (business driver), 94
- managed services, 53
- management summaries, creating, 270
- manager training guide, 77
- marketing the SharePoint support desk, 238
- market research, gauging demand for SharePoint solution, 12
- mean time between failures (MTBF), 192
- measurable goals (S.M.A.R.T.), 15
- measurable SharePoint support service, 232
- measurement of SharePoint benefits, 9
- measures of success for user adoption, 335
- Mentions, 101
- mergers and acquisitions, adoption of additional SharePoint solutions through, 182
- Message Delivery section, Communication Plan, 86, 89
- message framework for communication plan, 86
- metadata, 141
 - best practices for SharePoint content, 174
 - Content and Metadata section, user requirements document, 36
 - information architect's responsibility for, 209
 - management of, SharePoint 2013, 209
 - metadata and categorization policy, 160
- Microsoft Access
 - Access Services, 37
 - SharePoint features, 10
- Microsoft certifications for IT professionals, 148
- Microsoft Exchange Server. *See* Exchange Server
- Microsoft Office. *See* Office; Office 365
- Microsoft Office Specialist (MOS) certification, 334
- Microsoft Partner Network, 223
- Microsoft Project 2013, 18
- Microsoft Virtual PC, 292
- Microsoft Windows Installer file (MSI), location and documentation for, 291
- Microsoft Word. *See also* Office; Office 365
 - scenario and quick implementation of solution, 83
- milestones
 - creating a milestone report, 273
 - Milestones in delivery plan, 62
 - updating sponsor and stakeholders on, 29
- mission, reviewing to build user adoption strategy, 72
- mission statement, example of, 73
- mobile development, 292
- mobile devices
 - and IT consumerization governance, 151
 - attempts to restrict use of, 154
 - creating policies for use, 156
 - patching of, 156
 - planning for BYOD, 122–124
 - resources they can't consume, support and security challenges, 153
- Mobile Services, 39
- money, benefits of SharePoint, 7
- monitoring logs from SharePoint servers, 219
- monitoring progress in SharePoint delivery program, 56
- monitoring systems, externally connected, 234
- Morgan and Wolfe, 34
- MOS (Microsoft Office Specialist) certification, 334
- MSCE (Microsoft Certified Solutions Engineer), 148
- MSI (Microsoft Windows Installer), file location and documentation, 291
- MTBF (mean time between failures), 192
- "must-do" project, 7
- MySite content update policy, 160
- MySites, 101

N

- network diagrams, 272
- newsfeeds, 101
- non-financial benefits, 8

O

- objectives
 - agreement on meeting, in customization decisions, 290
 - assessing value, 114–115
 - assigning importance weightings, 110–112
 - evaluating each option, 112–114
 - identifying and structuring for solutions, 108–110
 - of legitimate SharePoint delivery program, 7
- Office
 - integration of SharePoint with, 26, 231
 - Microsoft Office Products, SaaS, 27

- tools, compability with off-premise use, 41
 - training on products, 334
 - version to be used, 136
 - Office 365
 - creating development environment with
 - Windows Azure and, 293
 - Office, Windows, Mac, and browser compatibility with, 41
 - pricing, information on, 14
 - provided as SaaS, information on, 21
 - SharePoint 2013 fully integrated into, 231
 - SharePoint Online, 27
 - SharePoint solution provided through, 30
 - support model, 133
 - Office Marketplace
 - SharePoint app customizations available from, 289
 - SharePoint solutions, deployment from, 288
 - Office Store, 20
 - Office Store Standard Application License Terms, 300
 - Office Web Applications, using in development environment, 293
 - off-premises SharePoint
 - costs of, versus on-premises SharePoint, 13
 - deciding between on-premise version and, 27
 - using SharePoint Online in Office 365, 11
 - on-demand training, 332
 - One-Stop Shop. *See* SharePoint 2013 One-Stop Shop
 - Online instance of SharePoint, 20
 - online training, 332
 - on-premises SharePoint, 51
 - costs of, versus off-premises SharePoint, 13
 - deciding between off-premise SharePoint and, 27
 - planning solutions, SharePoint Online versus, 40
 - process of implementation, 20
 - versus cloud-based solutions, 257–259
 - operating systems (client), SharePoint 2013 installation directly on, 292
 - operational costs, estimating for SharePoint solution, 14
 - operational-level agreement (OLA), levels of business continuity to support, 136
 - Operational Performance Measures, 8
 - operations and management of services, planning, 133
 - Operations Manual, creating for custom SharePoint solutions, 305
 - operations meetings, 330
 - organizational implementation of SharePoint, utilizing skills of strategy partner, 34
 - Organizational Summary section, Communication Plan, 87
 - organization of content, 4
 - Organize, Build, Discover, and Manage (business drivers), 94
 - Outline Plan (delivery plan), 57
 - outsourcing services, 53
 - ownership
 - and control of SharePoint tools, 300
 - building collaborative ownership of SharePoint solution, 96–98
 - business ownership of SharePoint solution, effects on user adoption and governance, 127
 - of requests and authorization for a SharePoint 2013 application, 300
 - owner for SharePoint Solution User Adoption, 335
- ## P
- PaaS (Platform as a Service), 27, 52, 296
 - panels, gauging demand for SharePoint solution, 12
 - partners, management of, 134
 - People Search, 83
 - performance
 - benefits of SharePoint, 8
 - importance of performance review site, 17–18
 - performance management, SharePoint 2013 features for, 190
 - PerformancePoint Services, 38
 - information resources for, 11
 - knowledge of, and overall financial benefit of SharePoint, 10
 - performance requirements, 189
 - personal information publication policy, 159
 - pilot studies, gauging demand for SharePoint solution, 12
 - Pitts, Bill, 65
 - planning (ADS sessions' output), 203
 - Plan section of Detail Plan (delivery plan), 57
 - Platform as a Service (PaaS), 27, 52, 296
 - platform governance, 14, 134–140. *See also* governance
 - aims of, 162
 - and scope for delivery of SharePoint solution, 20
 - areas to cover, questions to ask about, 135
 - decisions about data or site management, 137

- elements requiring clarification in SharePoint
 - governance framework, 138–140
- for platforms not under direct control of organization, 135
- on-premise versus SharePoint Online solutions, 40
- questions to be asked by organizations, 136
- platform overview, 188
- platforms (SharePoint), creating list of, 158
- plug-ins, 292
- policies
 - creating for mobile device use, 156
 - further resources on, 161
 - Policies section in Statement of Operations, 159
- Popularity and Search Reports, 149
- portals, administration of, 132
- precedence networks, 272
- prepopulation of content, 43
- presentation sessions, 202, 204
- Pre-workshop sessions, 311
- pricing, 13
 - information resources on pricing and licensing, 14
- pricing strategy, 14
- proactive services, 132
- proactivity in SharePoint support services, 246–251
- procedures and standards for support services, 248
- Process Performance Measures, 8
- process services, 139
- production environment, 291
 - separation from user acceptance, development, and test environments, 300
- PRODUCTION ENVIRONMENT, 294
- productivity
 - gains from using SharePoint, 2
 - use of personal devices and, 153
- Productivity Hub, 48
- product mission, 73
- professional services, 53
- progress
 - ascertaining progress reporting needs, 62
 - monitoring in SharePoint delivery program, 56
 - tracking and communicating for delivery program, 265–273
 - creating deliverables log, 270
 - creating late activities report, 271
 - creating management summaries, 270
 - creating milestone report, 273
 - creating network diagram, 272
 - methods of measuring progress, 265

- progress bar chart, 270
- reporting by delivery team, 266
- understanding content of reports, 267–268
- Project 2013, 18
- project interdependencies, 274
- Project Web App, 18
 - creation of issue and risk logs, 284
- Project Web App Connectivity, 66
- Proof of Concept/Sandbox environment, 117
- providers of custom solutions, cost of, 40
- publishing policy, 159

Q

- quality
 - adding to delivered SharePoint solution, 46–49
 - adoption, 48
 - approaches to determining quality, 46
 - governance, 47
 - ROI (return on investment), 49
 - vision, 49
 - quality assurance, roles and responsibilities of delivery team, 200, 224
 - quality management, measuring quality of provision of SharePoint service delivery, 8, 135
 - Quality-of-Service (QoS) requirements, 206
 - quality reviews, 317
 - carrying out, 316
 - parts or components of, 316
 - query closure, establishing for support services, 243
 - query rules, 16
 - reports on use of, 150
 - quick implementations, scenarios with, 83
 - quick win scenarios and solutions, 82
 - SharePoint themes for quick wins, 82
 - quota management, 161
 - SharePoint site storage size policy, 160

R

- reactive services, 132
- redirection options in SharePoint, 217
- regulatory requirements for long-term data storage, 169
- relevance for Internet search engine results, 172
- relevant goals (S.M.A.R.T.), 15
- reliability, 192
- remote accessibility issues, 41

reporting

- reporting
 - establishing for SharePoint support services, 244–245
 - practical techniques for, 245
 - sample weekly report, 245
 - on SharePoint delivery program, 266
 - practical techniques for, 267
 - understanding bar charts, 269
 - understanding content of delivery program reports, 267–268
 - using to control work in SharePoint support services, 247
 - Request Management, 190
 - requirements
 - SharePoint customization decisions and, 288
 - system, identifying without alienating users, 338
 - user and client, obtaining real agreement on, 338
 - Research feature in Word, 83
 - resilience in SharePoint, 192
 - resilience of SharePoint services, 256
 - resources
 - choosing to develop customized SharePoint solution, 291
 - delivery schedule as basis for resource plans, 262
 - for SharePoint support service, 233
 - questions answered in workshops, 310
 - required for search systems, 173
 - responsibilities
 - delivery team, 199
 - describing in Statement of Operations, 158
 - for SharePoint delivery program and associated solutions, 310
 - return on investment. *See* ROI
 - reusable functionality, SharePoint apps and users's perception of development, 298
 - reuse of SharePoint solutions, 95
 - revenue, benefits of SharePoint delivery, 7
 - review of SharePoint support services, 254
 - Reviews (in delivery plan), 62
 - Review Workflows, 18
 - risks
 - built-in apps for managing, 66
 - capacity risk analysis, 257
 - considering when developing delivery plan, 57
 - in availability of SharePoint platform, 135
 - management model for, 135
 - managing in delivery programs, 278–282
 - addressing risks after program has started, 282
 - connection between risks, issues, and change, 278
 - example of a risk log, 280
 - example of a risk matrix, 281
 - options for reducing risk, 281
 - steps to follow, 279
 - tips for use of risk log, 282
 - risk assessments of SharePoint production servers, 302
 - ROI (return on investment)
 - delivery program changes and, 164
 - IT, and reuse of solutions, 95
 - measuring, 49
 - user adoption as most critical factor, 72
 - roles. *See also* delivery team, understanding roles of players and roles in delivery program changes, 167
- ## S
- SaaS (Software as a Service), 21, 27, 296
 - off-premise SharePoint solutions implemented as, 51
 - SALEM (Sequenced And Logical Enterprise Methodology) process, 16
 - sandbox environment, development environment as, 293
 - Sarbanes-Oxley (SOX) Act of 2002, 169
 - scalable storage, amount to be required, 136
 - scenarios with quick implementations for Office, SharePoint, Windows 7 and 8, 83
 - schedules
 - built-in apps for managing, 66
 - creating a delivery schedule, 261–265
 - creating discreet schedules for SharePoint customization work, 290
 - scope creep, 165
 - scope, defining for SharePoint solution, 19–50
 - adding quality to delivered SharePoint solution, 46–49
 - creating learning and knowledge experience, 20–30
 - delivery program scopes, 22
 - example of SharePoint scope creep, 23
 - importance of defining scope, 20
 - creating solution delivery plan, 44–46
 - engaging the right people, 28–30
 - knowing SharePoint features, 24–28

- deciding between on-premise and off-premise SharePoint, 27
 - new features in SharePoint 2013, 25
 - organization's technical makeup and, 26
 - tying analysis to SharePoint features, 30–44
 - building user requirements document, 35–39
 - guidelines for successful delivery program, 42
 - planning on-premise versus SharePoint Online solutions, 40–42
- scope reserve, cost plan/forecast, 276
- SDLC (system development life cycle), informing developers of responsibilities in, 301
- search
 - building your search strategy, 172–174
 - checklist for building good strategy, 173
 - databases related to, 185
 - further information on planning a system, 174
 - helping users find content, 43
 - Popularity and Search Reports, 149
 - Query Rules in SharePoint 2013, 16
 - Search and Audience section, user requirements document, 36
 - search index policy, 160
- search services, 38, 138
- second-line level of support, 241
- security
 - addressing security concerns in SharePoint solution, 43
 - BYOD or personal devices, 152
 - Exchange Server, information about issues, 222
 - implications of apps available from Office Marketplace, 299
 - of content, 255
 - planning for services, 133
 - security breaches in mobile work environment, 155
- Sequenced And Logical Enterprise Methodology (SALEM) process, 16
- server hardening policy, 160
- servers
 - listing for SharePoint service delivery, 233
 - roles in SharePoint farms, 184
- Service databases, 185
- service delivery, 30, 132. *See also* SharePoint service delivery
 - costs, 14
- service groups, 185
- service-level agreements (SLAs), 230
 - decision to create SLA for SharePoint support service, 239
 - levels of business continuity to support, 136
 - SharePoint SLA layout, 240
- service model, creating for SharePoint, 132–134
 - activities involved in, 133
- services to deliver and support SharePoint solutions, 53
- sessions, types for delivery program, 202
- The 7 Habits of Highly Effective People, 24
- SharePoint 2010
 - capabilities of, 18
 - changes between SharePoint 2013 and, 26
- SharePoint 2013
 - built-in apps, 66
 - capabilities of, 18
 - changes between SharePoint 2010 and, 26
 - new features, 25
 - “SharePoint 2013 App Model and Customization Options” video, 289
- SharePoint 2013 Branding and Design policy, 160
- SharePoint 2013 One-Stop Shop, 215–220
 - areas in central location, 218–221
 - functions of, 216, 220
 - possible user needs, 218
 - reasons for impracticality of learning everything about SharePoint, 215
- SharePoint 2013 Store, 298
 - app customizations available from, 289
- SharePoint administrators, roles and responsibilities on delivery team, 200, 210
- SharePoint design, 138
- SharePoint Designer, provisioning to developers, 301
- SharePoint developers, 200
 - roles and responsibilities on delivery team, 213
 - program tasks, 214
- SharePoint farms
 - creation of, 52
 - relationships among, 184
- SharePoint Online, 27, 51
 - planning solutions, on-premise SharePoint versus, 40
- SharePoint Productivity Hub, 48, 83
- SharePoint service delivery, 229–260, 330
 - capability, availability, customers, and service, 230
 - cloud versus on-premise, 257–259
 - creating SharePoint support service, 231–254
 - communicating with customers, 251–253
 - controlling your work, 246–251
 - definition of SharePoint support, 232
 - establishing reporting, 244

SharePoint solutions

- examining your resources, 233
- identifying your customers, 235–238
- launching services, 238–240
- managing flow of calls, 240–242
- review and improvement, 254
- tasks, summary of, 233
- defined, 230
- understanding compliance, legal, availability, and resiliency, 255–257
- SharePoint solutions. *See also* solutions
 - defined, 19
 - listing in Statement of Operations, 158
- SharePoint Statement of Operations, 128, 239
- SharePoint Store. *See* Office Store
- short-term delivery teams, 53
- signing off on SharePoint solution delivery, 317–318
 - SharePoint deliverable sign-off form, 318
- single-server platform, SharePoint 2013 on, 221
- site lists and dynamic analysis trends (SharePoint One-Stop Shop), 220
- site maps, 171
 - sample showing website structure, 172
- sites
 - administration by tactical team, 132
 - decisions about site management, 137
 - SharePoint site for communications, 86
 - site creation policy, 159
 - site information policy, 160
 - site quota management, 161
 - site storage size (quota) policy, 160
 - types included in typical SharePoint platform, 129
- SkyDrive, 101
- SLAs. *See* service-level agreements
- S.M.A.R.T. goals for SharePoint, 15–16
- smart phones. *See also* mobile devices
 - statistics on, 122
- social networking, consumer-oriented, learning from, 42
- social networking in SharePoint 2013, 99–104
 - additional information about, 104
 - building user adoption strategy that encompasses, 103
 - questions for social networking in user adoption plan, 100
 - user-centric features, Enterprise Social, 101
- Software as a Service. *See* SaaS
- software constraints, 196
- software development, reaching age of commoditization, 292
- solutions
 - defined, 19
 - delivery and implementation of, 20
 - existing SharePoint solutions in library, 288
 - quick and simple implementations, 83
 - quick win scenarios and, 82
 - sponsors aligned to, 78
- solutions architects
 - business analyst role and, 206
 - roles and responsibilities on delivery team, 200, 212
 - support by information architects, 209
- specific goals (S.M.A.R.T.), 15
- sponsorship, questions about, addressed in workshops, 310
- sponsors (SharePoint), 54
 - engaging in delivery planning, 66–69
 - engaging in SharePoint delivery program and scope definition, 28
 - gaining buy-in, vital to user adoption, 74
 - getting support for user adoption, 77–81
 - SharePoint solutions and sponsors, 78
 - identifying benefits and aligning them with SharePoint features, 6
 - making sponsor head of Governance Committee, 128
 - not allowing to dictate solutions, 32
 - working with during delivery, 339
- SQL Azure, 27
- SQL Server, 221
 - information needed from team, 222
- Stages (delivery plan), 61
- staging environment, 291
- stakeholders
 - disagreements between, help in resolving, 5
 - engaging in delivery planning, 66–69
 - communications with stakeholders, 68
 - delivery stakeholder map (example), 69
 - identifying stakeholders and their power, 66
 - types of stakeholders and considerations, 67
 - engaging in SharePoint delivery program and scope definition, 28
 - keeping informed, in delivery planning, 63
 - management of, 134
 - role in delivery program changes, 167
 - workshops to gather information from, 3
- standards and procedures for support services, 248
- state government, SharePoint delivery provision for, 180
- Statement of Operations, 128, 158–161

- availability, inputs, escalation and key links sections, 161
- components of, 158
- questions asked by delivery team to help in building, 136
- questions asked by Governance Committee to build, 135
- system management requirements, 191
- storage, 139
- storage of content, 4
 - benefits of SharePoint, 17
- strategic and measurable SharePoint support service, 232
- strategic communications, 85
- strategy briefs, 202
- strategy team for SharePoint governance, 131
- Structure and Taxonomy section, user requirements document, 35
- success of SharePoint delivery, guidelines for, 42
- support for SharePoint solutions
 - creating model for, 79
 - describing in Statement of Operations, 158
 - ensuring that it's ready, 336
 - freeware apps and, 298
 - information workers' involvement in, 132
 - knowledge of features and, 25
 - sustaining SharePoint support, 327–329
 - areas of support, 328
 - setting realistic expectations and providing measurable support, 328
- support service. *See* SharePoint service delivery
- surrogate measurement, 9
- survey of customers of support services, 254
- system development life cycle (SDLC), informing developers of responsibilities in, 301
- system management requirements, 191
- system requirements, identifying without alienating users, 338

T

- tactical communications, 85
 - tactical communications planning, 85
- tactical team for SharePoint governance, 131, 132
- tactics for training, 145
- tagging, using SharePoint tagging for search, 173

- Talking Points section, Communication Plan, 88
- tangible benefits, 8
- tasks
 - built-in apps for managing, 66
 - Task List app connected to Deliverables app (example), 64
 - tracking in social network, 102
- taxonomy
 - information architect's responsibility for, 209
 - Structure and Taxonomy section, user requirements document, 35
- TCO (total cost of ownership), 114
- teams. *See also* delivery team
 - interfaces of delivery team with outside consultants, 223
 - interfacing with SharePoint delivery team in the organization, 221–223
- team site policy, 160
- technical management, subcontractors, 135
- technical training, 148
- technical training guide, 77
- technologies required for SharePoint 2013 operation, 221
- technology
 - in SharePoint solution development and delivery, 310
 - SharePoint solution acquisition and, 337
- technology commodization, 21
- technology requirements, businesses moving faster on, 22
- templates, communication, 85
- termination of SharePoint delivery program, 165
- Terms of Reference agreement, creating for delivery team members, 54, 200
- test environment, 291
 - separation from production, user acceptance, and development environments, 300
- TEST ENVIRONMENT, 294
- testing
 - guides for, 134
 - integration and hardware, 197
 - test requirements, 194–198
 - tests to apply to SharePoint solution, 195
- TFS (Team Foundation Server) SERVER, 294
- themes of a SharePoint environment, 82
- third-line level of support, 242
- third-party applications

third-party tools, implementation of

- directly connected to SharePoint, contacts list for, 233
- using to meet requirements, 288
- third-party tools, implementation of, 52
- throttle controls on number of items returned, 190
- time-based goals (S.M.A.R.T.), 15
- timeline (delivery program), 310
- time scale for delivery, 164
 - benefit, cost, and time model to gauge delivery program changes, 165
- tools, automated, providing reports, 220
- topology
 - design principle for SharePoint 2013, 184
 - SharePoint deployment types and descriptions, 185–187
- TORs (terms of reference), creating for delivery team members, 200
- total cost of ownership (TCO), 114
- training
 - aiding sponsor in building, 80
 - confirming completion of, 319
 - creating and sustaining training model, 335
 - creating SharePoint training program, 143–148
 - courses and descriptions, 146
 - resource requirements, 146
 - supplementary materials and producers, 146
 - tactics and channels for training, 145
 - technical training, 148
 - training plan document, 143
 - training plan scheduling, 147
 - training user types and roles, 144
- crucial factor in change management, 73
- deciding on method to use, 333
- for user adoption, scenario, 76
- impact on support and information worker roles, 334
- methods of, 332
- of users on site administration and management, 137
- questions about, addressed in workshops, 310
- SharePoint trainers on delivery team, 200, 225
- SharePoint Training site, 219
- summarizing in Statement of Operations, 159
- Training and Education area (SharePoint One-Stop Shop), 218
- understanding importance of, 98–99
- using training materials to manage flow of support service calls, 242

- training guides, 77
- training schedule, 76

- Translation Services, 39
- traveling or dispatched workgroups, SharePoint solutions for, 181

U

- UAT ENVIRONMENT, 294
- UAT (User Acceptance Test), 233
 - using for support services query closure, 243
- user acceptance environment, separation from production, development, and test environments, 300
- user adopters
 - traits of different types and strategies for, 75
 - types of, 74
 - user adopter types, 335
- user adoption, 71–126
 - accomplishment of, key requirements for, 337
 - and involvement of users in design of solution, 32
 - as measure of quality of SharePoint solution, 48
 - benefits of a user adoption plan, 72
 - building collaborative ownership, 96–98
 - building strategies for, 72–77
 - types of user adopters, 74
 - business case creating, 20
 - business goals related to (example), 30
 - creating SharePoint champions, 91–94
 - Detail Plan segment (delivery plan), 57
 - developing communication plans, 84–91
 - encouraging through knowledge of how users work with Office tools, 26
 - estimating demand for SharePoint solution, 11–13
 - forecasting benefits of, 10
 - getting support from SharePoint sponsor, 77–81
 - importance of User Adoption strategy, 92
 - planning for BYOD, 122–124
 - SharePoint development and, 297–299
 - social networking in SharePoint 2013, 99–104
 - sparkling excitement in potential users, 81–84
 - standardizing business needs, 94–96
 - sustaining, 331–336
 - practical techniques ensuring sustainability, 334
 - tasks to get users involved in delivery, exclusion of, 24
 - understanding goal alignment and importance of user adoption, 17

- understanding importance of training, 98–99
- understanding of process to ensure, 3
- using enthusiasm of early adopters, 43
- value management and value engineering, 104–122
- user guide, 77
- user interface designer on delivery team, 200, 226
- user interface design, web design standards, 226
- User Manual for customized SharePoint solutions, 304
- User Profile Service, 37
- user requirements
 - building user requirements document, 35–39
 - Section 1, User Objectives, 35
 - Section 2, Structure and Taxonomy, 35
 - Section 3, Content and Metadata, 36
 - Section 4, Search and Audience, 36
 - Section 5, Features, 36–39
 - built by business analyst on delivery team, 206
 - conversion into SharePoint solutions, 30
 - gathering for SharePoint solution, 30
 - gathering through meetings or workshops, 33
 - obtaining real agreement on, 338
- users
 - building accurate user personas for delivery program, 73
 - establishing good protocols for interviewing, 338
 - not using SharePoint as sponsor wants, 80
 - preparing to accept changes required by new system, 339
 - working with during delivery, 339
- User Solution Specifications document for customized SharePoint solutions, 302
- headings and descriptions, 303

V

- value added to organization by SharePoint, 8
- value management and value engineering, 104–122
 - additional information on, 122
 - applying value engineering to SharePoint solutions, 116–121
 - basic scenarios, 117–119
 - critical success factors, 121
 - tips to define value engineering for solution objectives, 121
 - applying value management techniques to customization decisions, 289
 - importance in solution design, 122

- managing value, 105
- objectives of value management, 107–116
 - assessing value, 114–115
 - assigning importance weightings, 110–112
 - checking sensitivity, 115
 - critical success factors, 115
 - evaluating each option, 112–114
 - structuring objectives, 108–110
- value engineering, 107
- vanity URLs, 217
- verification and validation of the SharePoint delivery program, 213
- Verification and Validation strategy (V&V), 225
- version control policy, 159
- virtual environments, 292
- vision
 - Envisions section of Detail Plan (delivery plan), 57
 - measuring quality for SharePoint solution, 49
- VMware, 292

W

- W3C (World Wide Web Consortium), web design standards, 226
- WANs (wide area networks), how user actions travel over, 174
- Web Analytics, 101
 - using for governance, 149
 - Popularity and Search Reports, 149
 - situations in which it's useful, 149
- web developers on delivery team, 200, 213
- Web Folder clients, 137
- Web Front End (WFE) servers, 185
- web graphic designers, 207
 - roles and responsibilities on delivery team, 200, 207
 - program tasks, 208
- web policy and security awareness, 159
- Web Services
 - created in-house, failue to scale well, 40
 - creation of, 52
- website component development, 292
- Wheatley, Meg, 152
- widgets, plug-ins, and components, 292
- Windows 8, hosting SharePoint clients, 293
- Windows Azure, 27
 - development of SharePoint autohosted apps or provider-hosted apps, 293

Windows Azure Workflow, using in development environment

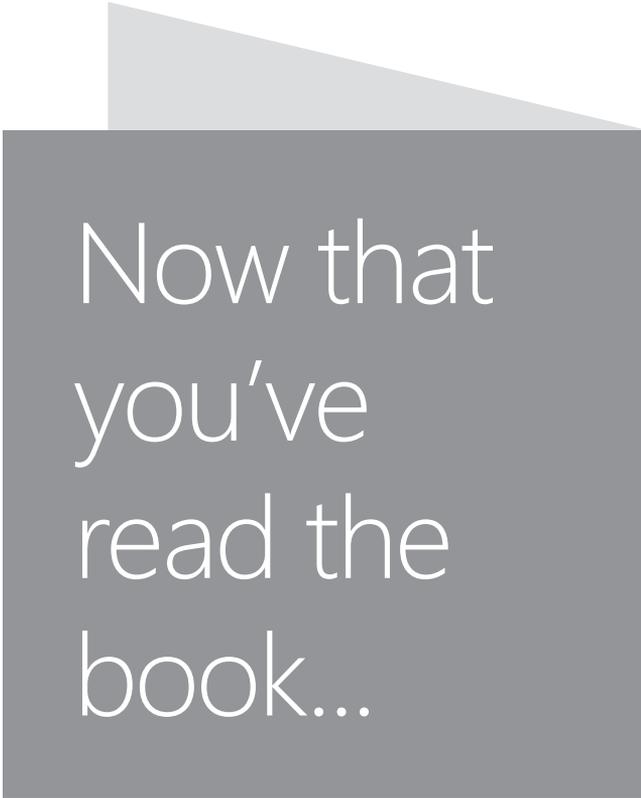
- Windows Azure Workflow, using in development environment, 293
- Windows Explorer Search, 83
- Windows Server, 221
- wireless connectivity, risks from, 155
- wish list for communication planning, 86
- Woodrow, Floyd, 202
- Word. *See also* Office; Office 365
 - scenario and quick implementation of solution, 83
- Wordpress sites, 292
- work, controlling in support services. *See* controlling work in support services
- workers. *See* information workers
- workflow, 139
- workflow management for SharePoint support services, 242
 - sample flowchart for managing customer queries, 250
- Workflow Services, 39
- Workflow Services policy, 160
- Work Management Service, 39, 102
- Work Packages (delivery plan), 61
- work packages for SharePoint development, 302
- workshops, 309–326
 - gathering information from stakeholders, 3
 - managing, 309–315
 - brainstorming, 315
 - conducting the workshops, 312–314
 - questions answered by workshops, 310
 - sample SharePoint workshop session, 311
 - quality reviews, carrying out, 316
 - showcasing solutions and getting user feedback, 84
 - signing off on SharePoint solution delivery, 317–318
 - training workshops, 145, 333
 - using to gather user requirements, 33
- World Wide Web Consortium (W3C), web design standards, 226

About the author



GEOFF EVELYN is a Microsoft SharePoint Most Valuable Professional (MVP) with over 25 years of experience in information systems technology. He has worked in the education, service delivery, IT support, government, military, banking, oil, and gas industries, and has been focusing his efforts on SharePoint since 2003. Geoff is a member of the IAP Software Development Practice Journal Editorial Board, a fellow of the Institute of Analysts and Programmers, a fellow of the Institute of Computer Technology, a member of the Institute of Management Information Systems and Engineering Technology, and a Prince 2 practitioner.

He also is certified as a Microsoft Certified Desktop Support Technician (MCDST), a Microsoft Certified Solutions Developer (MCSD), a Microsoft Certified Technology Specialist (MCTS), a Microsoft Certified IT Professional (MCITP), and a Microsoft Office Specialist (MOS). Geoff is the author of *Managing and Implementing SharePoint 2010 Projects*, the *MOS 2010 Study Guide for Microsoft Office SharePoint*, the *MOS 2013 Study Guide*, and co-author of the *MOS 2010 Study Guide for Microsoft Word Expert, Excel, Access, and SharePoint*, all titles published by Microsoft Press.



Now that
you've
read the
book...

Tell us what you think!

Was it useful?

Did it teach you what you wanted to learn?

Was there room for improvement?

Let us know at <http://aka.ms/tellpress>

Your feedback goes directly to the staff at Microsoft Press,
and we read every one of your responses. Thanks in advance!

