
If you build a portal solution, will users come?

...six key strategic elements for building
successful portal solutions with MOSS 2007

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Agenda

- Introduction
- Six Key Elements of Successful Solutions
- Summary
- Q&A

It's a great solution, why won't users come?

- Unlike the new General Ledger, Procurement, or Accounts Payable system, you can't **mandate** the use of the new collaboration system
- Sometimes, you need to jump start with some **incentives**
- Often, you need to incorporate **personal performance measures** to ensure that the importance of the new solution is demonstrated in something more than a good communications plan and an enthusiastic project team
- Users need to understand the **benefits** to them

How can you ensure that they do?

Six Key Strategies:

- Identify Your Stakeholders
- Understand Their Business Objectives
- Identify How Success Will Be Measured
- Prepare a Governance Plan
- Define Procedures for Content Management
- Plan Roll-Out and Launch

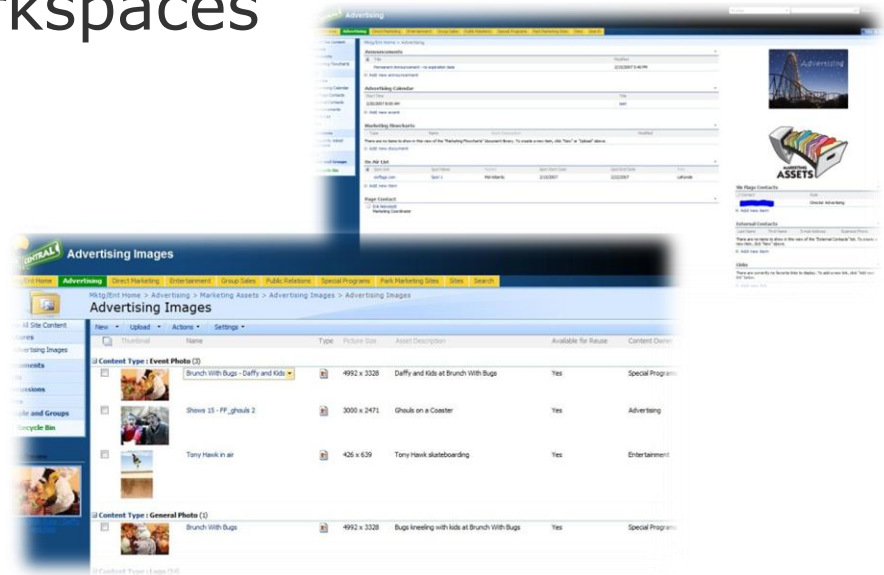
Identify the Key Stakeholders

- Since the success of MOSS solutions is critically dependent on business user adoption, it is imperative that business stakeholders take an active role in portal design and governance planning.
- Who should be included?
 - ➔ Sponsoring Executive(s) – be sure you REALLY understand what they think the project is and their vision for what will happen when the solution is implemented
 - ➔ Business Unit leaders – especially HR and Corporate Communications
 - ➔ Content Contributors and Owners
 - ➔ Project Managers/Team Leaders who will own team sites
 - ➔ Department Managers who will publish on intranet pages

Understand the Business Objectives

For example:

- Central repository of marketing assets
- One-stop shop for firm-wide information
- Online collaboration workspaces



"Reusable" Business Objectives – Part 1

- Provide easier and more timely access to the information employees need to get their work done
- Provide easier and more effective mechanisms to move work between business entities, such as self-service for customers or partners, enabling outsourcing by providing business partners with access to a collaboration environment or business data on an extranet
- Provide an organized "one stop shop" for information by making it easier to find authoritative information
- Improve the ability to share and exchange information across the organization by providing an electronic publishing method that is easy for users to leverage
- Improve the "time to talent," the speed with which new employees become productive

“Reusable” Business Objectives – Part 2

- Maximize the reuse of best practices across the enterprise, enabling the organization to replicate successful business practices in all geographies
- Reduce training costs for enterprise applications by providing a consistent user interface to all applications
- Improve time to market for proposals and contracts by providing easier access to reusable assets
- Improve organizational learning by providing easier access to critical information and organizational memory
- Improve customer service by providing direct access to the information customers need
- Improve project execution by providing an opportunity for work teams to collaborate and to electronically store project information in fully searchable, organized team sites

Identify Measures of Success

Objective	Possible Measure	Capture	Issues and Challenges	Target
<p>Maximize the reuse of best practices across the enterprise, enabling the organization to replicate successful business practices in all geographies</p>	<p>Quantitative: Number of downloads of best practice or re-usable assets</p> <p>Qualitative: Usage anecdotes where users can describe in quantitative terms how a MOSS asset that they re-used contributed to business objectives.</p>	<p>Monthly</p>	<p>Frequent downloads are a proxy for content value, indicating that the content is delivering value to users.</p> <p>Gathering anecdotes is a labor intensive process and may require some creativity to obtain. You may want to consider a success story contest (with prizes) to get MOSS users to share high quality success stories.</p>	<p>Look for an upward trend in the number of downloads for new content or new portals. Look for steady state activity in more mature environments.</p> <p>Targets should be set based on the maturity of the solution and the strategic importance of the content.</p> <p>Targets for success stories might be based on total "value" represented in the stories collected and/or based on the number of stories documented.</p>

Identify Measures of Success, continued

Objective	Possible Measure	Capture	Issues and Challenges	Target
Improve time to market for proposals and contracts	Quantitative: Average proposal or contract development time	Ideally captured for each item and compiled on a semi-annual or annual basis.	This measure will be easiest to capture if it is already a key performance measure for the enterprise.	Trend downward from baseline. Target might also be a specific percentage of time reduction.
Reduce training costs for enterprise applications	Quantitative: Total training costs for enterprise applications	Annual	Some organizations justify their MOSS investment solely on the reduction in training costs.	Percentage or absolute reduction in training expenses for enterprise applications.
Provide an organized "one stop shop" for information for MOSS users that helps users reduce information overload.	Qualitative: Usage anecdotes where users can describe in quantitative terms how using MOSS has improved their productivity.	Monthly	Gathering anecdotes is a labor intensive process and may require some creativity to obtain. Consider using the built-in MOSS survey capability.	Targets for success stories might be based on total "value" represented in the stories collected or based on the number of stories documented.

Why do you need a Governance Plan?

- Avoid portal, team site, and content "sprawl"
- Ensure that content quality is maintained for the life of the portal
- Consistently provide a high quality user experience by ensuring that the governance plan is followed
- Establish clear decision making authority and escalation procedures so that policy violations are dealt with and conflicts are resolved on a timely basis
- Ensure that the portal strategy is aligned with business objectives so that it continuously delivers business value

Components of a Governance Plan

- Vision Statement – high level assertions about what you want to achieve with the portal initiative. For example:
 - ➔ “Our new solution will be the primary source of all information employees need to do their jobs.”
 - ➔ “The solution will be the primary means of sharing documents within the enterprise.”
- Principles – express corporate preferences that support the vision statements. For example:
 - ➔ “We will use a federated model of content management wherever possible.” (Corporate provides guidelines and optimal standards, but individual businesses may vary from the corporate guidelines if absolutely necessary from a business perspective.)
 - ➔ “Department-level decisions will be vetted by other departments. However, no single unit will have a veto over decisions.”

Sample Governance Plan – Guiding Principles

Guiding Principle	Implication
Standards and Policies	
The overall goal of portal governance policies is to maximize the collaborative value of the portal and encourage and support sharing of best practices across the firm.	To ensure that users can easily find content as they navigate from page to page in the portal, there will be some page template standards that all publishers will be expected to follow.
The implementation will provide a set of standard site templates and web parts that site owners may choose to apply as needed.	There will be a standard design for each page and site to ensure consistency and usability across the entire portal. However, site owners can choose to eliminate or add web parts from the standard template based on their specific business needs.
Corporate Communications will evaluate and prioritize the development of new web parts or templates in conjunction with the Portal Governance Board.	Suggested new web parts will be evaluated based on business need and cost and prioritized as with other technology applications.
Sites with a broad audience across the firm will generally have stricter guidelines for content and layout than sites that have a more restricted audience. Changes that impact a large audience will require a higher level of approval than changes for pages or sites that are used by only a small group of people (such as a workgroup team site).	Site owners will have more flexibility to customize their private team sites than they will on corporate-sponsored pages.
Users who are assigned privileges which enable them to modify the portal structure (pages, web parts, content types, etc.) must be trained and certified by Information Technology.	If it is determined that users outside Information Technology will have permission to make certain changes on pages or sites, these users will need to commit to participating in training and certification programs.

Sample Governance Plan – Guiding Principles

Guiding Principle	Implication
Security and Access	
The default access for all pages on the portal is “read only” to the enterprise. Site owners must expressly define any restrictions if they wish to restrict access to their pages.	This means that, as a general rule, any site is open to anyone in the firm. Users who want a private team space for a restricted set of people will need to explicitly “invite” users into the site.
Content and Records Management	
All content posted to a publishing page will be governed by a content management process that ensures published content is accurate, relevant, and current. Content owners (Site Owners) will be responsible and accountable for content quality and currency.	Site Owners are encouraged to review the content on their pages at least annually to ensure that all of the content is still valid.
Shared content should be published once, by the content owner, and linked to by other sites as needed.	When you publish content to the portal, you are making a commitment to maintain that content for its “lifetime.” If you (or your department) are not the primary creator of the content, you should not publish the content yourself. Instead, you should ask the content owner to publish the content and, if appropriate, you can create a link to the content from your page on the portal. This will ensure that there is only one copy of a particular document or other type of content on the portal.
Content owners are responsible for ensuring their content is managed according to corporate records retention policies.	Content owners will still be responsible for identifying content that is a record and ensuring that the appropriate action is taken to ensure that records retention policies are followed.

Components of a Governance Plan, continued

- Policies – specific guidelines reflecting firm decisions the organization has made. For example:
 - ➔ “The team collaboration and document management solution of choice is from Microsoft. We will use SharePoint for all new projects where this functionality is needed, unless a specific case is made to use another one.”
 - ➔ “Established implementations that do not use the preferred products will continue to be used until they need major updates.”
 - ➔ “In order to optimize user experience, download time for users must be taken into consideration when submitting large documents. File size guidelines are”
 - ➔ “File names should be topical and descriptive. Generally, file names should not include dates or versions. If a file name must contain dates, then the following format must be followed to ensure consistent sorting, for example: File Name_YYYY_MM_DD.”

Components of a Governance Plan, continued

- Procedures – define how to do specific operations. For example:
 - ➔ How to upload or create content
 - ➔ How to start a workflow
 - ➔ How to remove content
 - ➔ How to add, change, or remove items from the corporate taxonomy
- Roles and Responsibilities – define how each member of the firm is responsible for ensuring the success of the intranet portal solution. The next several pages describe the typical roles and responsibilities for a SharePoint-based portal solution.

Examples of Key Roles and Responsibilities

All members of the firm have a role to play in ensuring the success of the portal but there are several key roles that are especially important.

Executive Sponsor	Provides executive level sponsorship for the portal. The primary responsibility of the Executive Sponsor is strategic, positioning the portal as a critical mechanism for achieving business value and helping to communicate the value of the portal to the management levels of the organization.
Portal Governance Board:	Serves as a governance body with ultimate responsibility for meeting the goals of the portal. This Board is typically comprised of representatives of each of the major businesses represented in the portal, including Corporate Communications and IT.
Portal Owner (Business):	Manages the overall design and functionality integrity of the portal from a business perspective. This person is usually a representative from a business stakeholder but may be filled by two people, one representing the business and one representing the technology department. The Portal Owner does not have to be an IT expert but their job function typically includes responsibility for internal communications.
Portal Administrator (Technology):	Manages the overall design and functionality integrity of the portal from a technology perspective. Works in partnership with the Portal Owner.
Site Owner:	Serves as the centralized, primary role for ensuring that content for a particular page/site is properly collected, reviewed, published, and maintained over time. The Site or Page Owner is an expert in the content that is showcased on the site or page. The Site/Page Owner will likely need to learn about SharePoint, but their primary expertise is business focused. The Site Owner may designate a Page Contact who will provide the primary interface between their business and the users of the page or site.
Users:	Uses the portal to access and share information. Also, owns and maintains the content they publish on it. Users can play the role of either Member (users with contribution permissions), Visitor (users with read permissions), or both, depending on the specific site or page in the portal.
Technology Support Team:	Ensures the technical integrity of the solution. Makes regular backups of the portal and its content. Also, usually sets up and maintains the security model, at least the components in Active Directory. Develops new web parts and provides support to Site Owners seeking enhancements to their pages or new uses of the portal.

Define Procedures for Content Management

- A good Content Management plan addresses both the design of content as well as its ongoing maintenance.
- As general guiding principles, content in the portal needs to meet the following characteristics:
 - ➔ Usable: The content organizational framework needs to match how users think about their work. Usability relates to both content design and maintenance. This principle has guided our design for content.
 - ➔ Credible: Content needs to be maintained – it must be reliable, timely, and accurate. Credibility is primarily a content maintenance issue but content credibility is also an important consideration in your content conversion plan.
 - ➔ Relevant: Content must be relevant to the users' daily needs. Content relevance is an important part of both content design and maintenance.

Content Management - Usability

- Usability strategies ensure that the portal content continues to provide value to users over time.
- Three key areas to consider for content usability are:
 - ➔ Structuring Content to Facilitate Search – the content management strategy needs to define portal content in a way that facilitates accurate search results.
 - ➔ Creating and Maintaining a Logical and Organized Content Taxonomy – the content classification strategy needs to successfully support browsing and navigation.
 - ➔ Leveraging Personalization Capabilities to Target Content – the content structure should support both targeting content to specific users and allowing users to personalize content based on their specific business needs.

Content Management – Credibility and Relevance

New Content

- Decide what content requires review and approval. Establish guidelines for which types of content should be reviewed and approved and to what extent.
- Ensure that it is apparent to the user the degree to which the content has been reviewed and whether or not the document they are reviewing is in “final” form or is just a “draft” or “work in progress.” Consider a “Status” Site Column to all document libraries with values of Published or Draft so that users will clearly know the intended use of all content (especially in team sites).
- Decide how “work in progress” will be shared in the portal or whether only “final” documents (this could vary by department or project) will be shared. Many organizations define that “work in progress” should only “live” in private team sites until it is ready to be shared more broadly. At that time, content is officially “published” in the portal.

Content Management – Credibility and Relevance

Existing Content

- In addition to specific portal content, you will also need a strategy to maintain the content of Site Columns and Content Types, including the search substitution terms.
- If possible, plan to maintain the initial “metadata dictionary” throughout the life time of the portal.
- Continue to monitor and maintain the need for new search substitution values over time.
- Plan to continue to review all access rights for content.

Plan Roll Out and Launch

- Communications
- Training
- Launch and Content Conversion
- User Support
- Incentives and Rewards
- Measurement

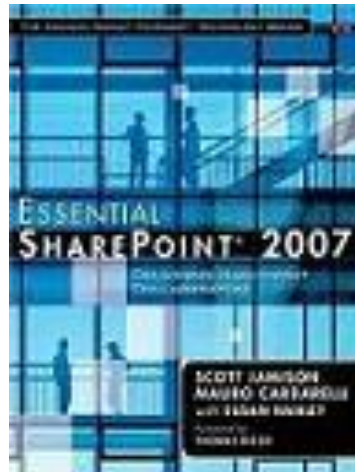
Summary

- Portal and collaboration software can be expensive to purchase and integrate. If you want to build a successful solution, you need a carefully defined strategy.
- Ensure that the MOSS rollout has a clear connection to business goals and objectives.
- Understand how success will be measured.
- Develop a method to identify and quantify pragmatic, tangible benefits for the MOSS solution.
- Establish a governance framework to ensure quality and relevance of content and to ensure that all users understand their roles and responsibilities.

Summary, continued

- Make sure that you have a Governance Board with a strong advocate in the role of executive Sponsor.
- Keep your governance model simple. Portals need a strong governance model, but they don't need complicated models with lots of bureaucracy.
- Don't make the solution itself more complicated than it needs to be.
- Keep in touch with your users. Make sure you have a plan for collecting feedback on an ongoing basis.
- Just because the intranet exists, it doesn't mean that everything should be on it. Carefully assess what should be on the intranet portal and what shouldn't.

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