
Secrets of Successful Portal Implementations

...If you build a MOSS 2007 portal solution, will users come?

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Agenda

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

What's so different? Why don't users just come?

- Unlike the new General Ledger, Procurement, or Accounts Payable system, you can't **mandate** the use of the new collaboration system – there is **always** another option
 - Users need to understand the **benefits** to them – not the team, not the organization – to **me** personally
 - You may need to jump start with **incentives**
 - Consider incorporating **personal performance measures** to ensure that the importance of the new solution is demonstrated in more than a newsletter and an enthusiastic project team
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How can you ensure that they do?

- Identify Your Stakeholders
- Understand Their Business Objectives
- Understand How Your Solution Fits in a Web 2.0 World – BE PREPARED!
- Identify How Success Will Be Measured
- Prepare a Governance Plan
- Define Procedures for Content Management
- Plan Roll-Out and Launch

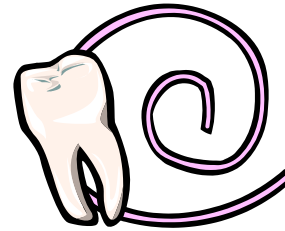
Identify the Key Stakeholders

- Who are they?
- What are their roles in the organization?
- Do you have stakeholders outside the organization?
- What makes them unique?

If your users are “average Americans,” we might know something about them ...

- Are all users equally comfortable with new technology? This can have a significant impact on your training and communications plan.
- Do they have a compelling business need to learn a new way of collaborating?
- Will they all engage with the new solution in the same way?

They spend over \$100 more a year on footwear than on vegetables.*



They don't floss regularly

They live within **WAL*MART** 20 minutes of a

*“The Average American: The Extraordinary Search for the Nation’s Most Ordinary Citizen” by Kevin O’Keefe

Examples of Key Stakeholders

- 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 for enterprise solutions
- Content Contributors and Owners
- Project Managers/Team Leaders who will own team sites
- Department Managers who will publish on intranet pages
- Partners
- Customers

Understand the Business Objectives

For example:

- Improve collaboration with partners
- Searchable central repository of marketing assets
- One-stop shop for firm-wide information
- Share best practices and collaborate across teams with online collaboration workspaces
- Replace shared drives with searchable, organized document repositories
- Document management
- Business process dashboard

Examples of 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
- **Capture knowledge of retiring employees** in a collaborative environment

Examples of 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

Understand How Your Solution Fits in a Web 2.0 World

- You'll definitely get asked, so be prepared!



- Blogs
- Wikis
- RSS

- It may not be clear when the time is just right. According to Forrester, "in 2008, companies with 1,000 or more employees to spend approximately \$110 million for building externally facing social networks, while only \$60 million for the internal variety."*

*Source: CIO Magazine, April 2008;

http://www.cio.com/article/344167/Adoption_of_Corporate_Social_Networks_Remains_Sluggish_/1

Understand How Your Solution Fits in a Web 2.0 World

- Stakeholder questions and requirements:
 - ➔ “Should we have allow blogging? Who should blog?”
 - ➔ “We need a wiki.” (Do you really?)
 - ➔ We need Facebook for the enterprise!” “Should we be paying attention to Facebook (or LinkedIn or Plaxo, etc.)?”
- SharePoint and Web 2.0
 - ➔ MySite can be leveraged like an internal Facebook – but be careful, don’t assume that your private network will replace the public network
 - ➔ Primary value proposition is integration with Office. Web 2.0 software is generally not powered by installed applications.
 - ➔ Some of the pure play Web 2.0 vendors (Atlassian – SharePoint Connector – embed Confluence wiki; NewsGator – Social Sites 2.0 – tag clouds, mini-profiles, social networks) have formal integration with MOSS

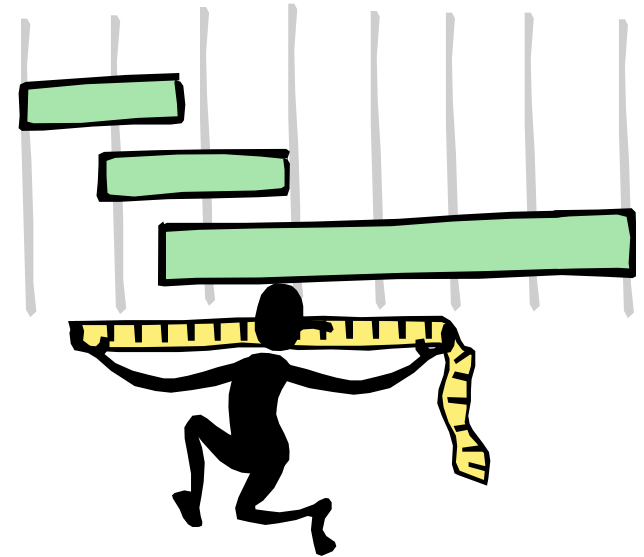
How should you think about addressing Web 2.0 concepts in your solution ...

- ...the same way you plan for successful knowledge management projects
- UNDERSTAND THE BUSINESS CASE – if you can't identify the business case, focus on improvements to the features you already have
- Think big, start small
- Select the initial project carefully:
 - ➔ Impact (ROI)
 - ➔ Transferable
 - ➔ Chief Sponsor/Advocate with Power
 - ➔ "Do-able"
- Think through the consequences
- Put someone in charge
- Monitor – be prepared to change
- Don't forget – WIIFM
 - ➔ Resource: How to Get the Most Value from Social Computing for Business with Microsoft

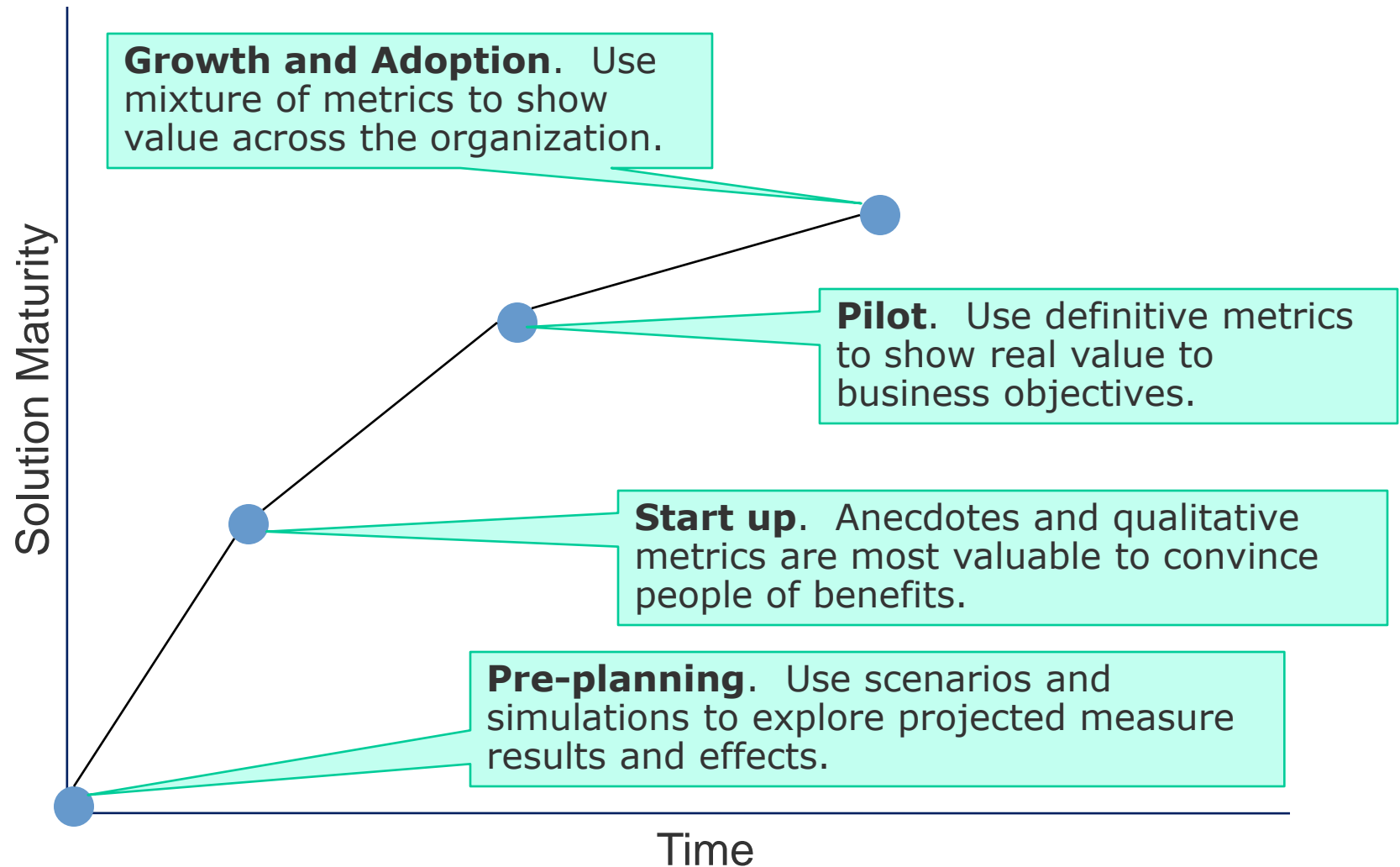


Identify the Measures of Success

- Track each measure to your business objectives.
- For each objective, identify:
 - ➔ Possible Measure: Quantitative and Qualitative
 - ➔ Capture Frequency and Technique
 - ➔ Issues and Challenges
 - ➔ Target and Goal



Consider Different Measures for Different Stages of the Life-cycle



Example Metric

- For example: if your business goal is to “maximize the reuse of best practices across the enterprise”
- Possible Measures (Adoption phase):
 - ➔ Quantitative:
 - Number of downloads of best practice or reusable assets
 - ➔ Qualitative:
 - Usage anecdotes where users can describe in quantitative terms how a MOSS asset that they re-used contributed to business objectives.
- Capture Frequency: Monthly

Example Metric, continued

- Issues and Challenges:
 - ➔ Frequent downloads are a proxy for content value, indicating that the content is delivering value to users.
 - ➔ Gathering anecdotes is a labor intensive process and may require some creativity to obtain.
- Target:
 - ➔ 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.
 - ➔ Targets should be set based on the maturity of the solution and the strategic importance of the content.
 - ➔ Targets for success stories might be based on total "value" represented in the stories collected and/or based on the number of stories documented.

Sample Usage Anecdote

- I joined the organization on March 16 without previous experience. After one week of training, I joined a project team.
- After one day of training on the project, I was assigned a task to learn a particular technology that was new to everyone on the team. I was given a bunch of books and told that I had **three days** to learn how to create a project using this technology.
- In my first week of training, I remembered learning about the company's expertise locator. I sent an e-mail to four people I found asking for their help. One of them sent me a document containing exactly what I wanted. **Instead of three days, my task was completed in one-half a day**

Metrics approach for productivity improvements

(<http://www.useit.com/alertbox/portals.html>)

- Identify a set of core employee tasks.
- Determine how frequently employees perform these tasks.
- Find the loaded hourly cost of an average employee.
- Observe and time people as they perform the defined tasks in your current design (a simple stopwatch will suffice).
- Multiply the following numbers to determine how much it costs the company to have employees accomplish the tasks using the current design:
 - ➔ Time on task
 - ➔ Each task's frequency
 - ➔ Hourly rate
 - ➔ Number of intranet users
- Adjust the cost estimate to account for the tasks you didn't measure. For example, if you measured 1/3 of the core tasks, multiply your measured numbers by 3 to get a decent estimate for all tasks.
- Repeat after launching your new design or new portal. Subtract the differences for an estimated ROI.

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

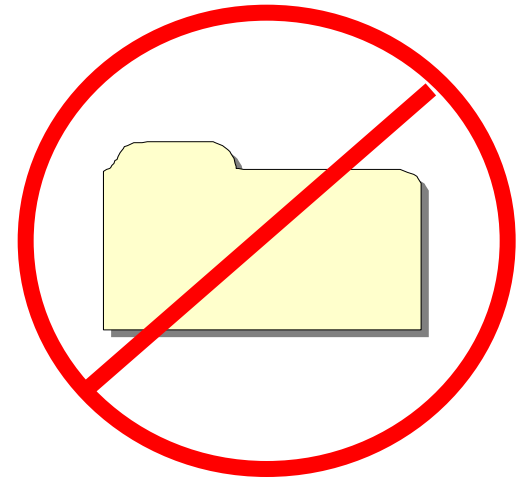
- Vision Statement – high level assertions about what you want to achieve with the portal initiative. For example:
 - ➔ “Our new solution will be the primary source of all information employees need to do their jobs.”
 - ➔ “The solution will be the primary means of sharing documents within the enterprise.”
- Principles – express corporate preferences that support the vision statements and principles that guide the design. 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.”

Example Guiding Principles – Design

- Consistent user experience
- Design with the end user in mind – minimize the need for training
- Standards tied to scope (audience)
- Just because you can, doesn't mean you should (“with great power comes great responsibility”)
- Existing rules still apply (privacy, use of IT resources, records retention)
- Default access is “read only” for all – apply additional “read” security only as needed

Example Guiding Principles – Usage and Content Management

- No e-mail attachments – send links
- Publish once, link many
- Use Metadata, not Folders – more flexible in responding to a dynamic environment
- Content management is everyone's responsibility but site owners are accountable
- Content owners are responsible for ensuring their content is managed according to corporate records retention policies.



The “no folders” paradigm shift – likely to be your biggest challenge: relevant examples are critical!

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 page describes the typical roles and responsibilities for a SharePoint-based portal solution.

Examples of Key Roles and Responsibilities

- Executive Sponsor
- Portal Governance Board
- Portal Owner (Business)
- Portal Administrator (Technology)
- Site Owner
- Users (Visitors, Contributors)
- Technology Support Team

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
 - ➔ Credible
 - ➔ Relevant

Plan Roll Out and Launch



- Communications – persistent
- Training – don't underestimate the training requirements for the SharePoint "paradigm shift;" "bite sized chunks"



➔ <http://sharepoint.microsoft.com/gearup>



- Launch and Content Conversion – clean first!



- User Support – community of practice
- Incentives and Rewards – make it fun!

- Measurement – for funding and feedback



Training – don't just throw it over the fence

- The paradigm shift
 - ➔ Don't underestimate how hard it will be for users to understand the concept of metadata
 - ➔ Assume all users are from Missouri!
 - ➔ Plan a variety of types and opportunities for training. One size does not fit all!
- Security
 - ➔ Security concepts are not straightforward for most users
- Information overload
 - ➔ Think about initial training for the "basics" followed by shorter training modules offered "just in time" for interested users



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.
- The portal must be somebody's job – on an ongoing basis.
- 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.

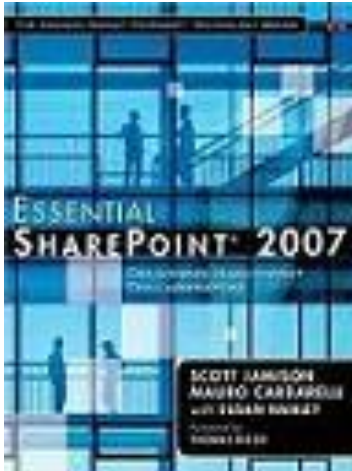
Summary, continued

- Establish a governance framework to ensure quality and relevance of content and to ensure that all users understand their roles and responsibilities.
- 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.

Summary, continued

- Plan your roll out carefully – don't assume you won't need training! Don't assume that everything stops after launch.
- 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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