SharePoint 2010 Migration - Foundations

“The single most important task of a SharePoint system is to find information.”

## Importance of Planning

SharePoint projects are notorious for their difficulty. The seeds for a successful project are sown in the early days of the project, when you individually or as a team/department acting as the project consultants, have to rapidly integrate yourself into the rest of the areas of the organization, build trust with your “client stakeholders” in order to work in conjuction with them and gather the essential information you will need to be able to deliver a successful solution. You are doing more than just listening and learning in this phase: You are educating the rest of the company and often shaking them to their core by forcing them to rethink their approach to technology solution implementation. You push toward simplicity and maintain your focus on business outcomes rather than simply gathering lists of requirements. You do this knowing that the simpler solution is much more likely to be successful, and that it will be the foundation upon which more complex and sophisticated solutions may be built.

These days SharePoint deployment and configuration are relatively straight forward.  It still takes a great deal of skill but it isn't something that usually requires extensive planning and innovation anymore.  For most companies and most implementations, there is now a growing body of "best practices", step-by-step HowTos, and instructional videos that provide solid guidelines for deployment directly from Microsoft and other top solutions partners.

But once it is deployed, what do you actually *do* with it?  Most SharePoint failures have been technical successes but business failures.

## It Isn’t The Technology, It’s What You Do With It

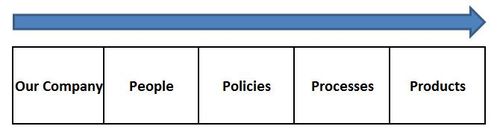
**The point of SharePoint** isn’t the technology and all the things there are to know and configure with this non-traditional application and it’s interwoven components, but to **achieve improved business performance where ad hoc data is concerned** (all the documents, emails, spreadsheets, and presentations created or revised for the special purpose or end presently under consideration, without consideration for wider application, generality, justification or even planned carefully in advance). SharePoint isn’t a special purpose automation or collaboration tool focused on a particular pattern of business processes. It is a *virtual environment* that connects people, information and work areas in order to accomplish all kinds of ad hoc tasks, yet importantly, it does so in a way that enables the knowledge workers to have a great deal of tactical freedom while maintaining a strategic structure and focus to all of their activities.

All processes produce artifacts or documents that then must be managed. SharePoint is a great platform for ad hoc and team-based information management for current work-in-progress. After the process has closed and the product or service is complete, it may be a good idea to archive the process artifacts in a records or document management system and provide interoperability between the two systems. But, *somewhere between deployment and successful business use there is a missing link*.

The answer is in the creation of some strategic and essential taxonomies (organizational systems).  One core taxonomy is the Policy Taxonomy. This taxonomy is not an ordered structure of nouns used to classify documents (like the ones around metadata, for example).  Essentially the policy taxonomy is a set of business domains that are used to both organize the site structures within SharePoint, but more importantly serve as a method to organize a governance team to oversee and manage SharePoint use without crushing it. There needs to be a foundational governance and taxonomy plan that spells out how SharePoint will be aligned with the strategic directives of the organization.

Each of the recommended seven-to-ten policy taxonomy buckets has a governance owner who is responsible to act as steward for that section of SharePoint use, its policies, look and feel, growth and structure.  Together the various bucket owners form the business governance team for SharePoint and work together to establish enterprise-wide standards.

Policy taxonomies should ideally be organized into a "process arc" that clearly tells the story of the organization's creation and use of information. Not all organizations are strongly process-centric, so not all policy taxonomies will fit neatly into an arc. On the other hand, your organization does have a process arc of some kind or it wouldn't be in business. Find the process arc and align it with your policy taxonomy and you have a winning combination that is both intuitive and effective.

[](http://www.sharepointplan.com/.a/6a00e553b06267883401156f8c7016970c-popup)

The diagram above shows a fairly typical generic process arc. First, the results of gathering a broad range of information, distilling it down according to the best practices for policy taxonomies, and then validating it as being robust enough to meet the organization's information management needs, leads to time organizing the taxonomy "buckets" into a process arc. It can’t be emphasize enough how important this is for the long-term usefulness of a policy taxonomy. It takes a static set of policy domains and organizes them to tell a story that describes the operation and purpose of the organization. Participants and eventual users should see the arc after it has evolves and exclaim "so that is what our company does!"

Again, keep in mind that these are not noun-based taxonomies that are common in document management and knowledge management systems. Those taxonomies still have their place and they are still important for working with those systems.

Here is what the diagram above "says"

1. We begin with our company, its structure, history, departments and organizational information.
2. The company is an organization of people, our customers are ultimately people, as are our partners and competitors. Information about people tend to have the same metadata structures, constraints, reporting guidelines and other policy structures.
3. The people's activities are constrained and informed by policies.
4. The people's activities are then guided by processes and best practices.
5. The end result is the "value proposition" for the organization, whether it is in the public or private sector. The value of an organization is almost always defined in terms of goods and services.

## Policy Taxonomy Planning Workshop

A workshop meeting can be tricky but essential to get the right mix of people in the room. You don’t want to be in a room with just managers, they don’t know or have forgotten what the frontline people really do. Getting line staff into the meeting is essential as they can truly tell you what the pain points are in the actually in use day-to-day activities of the business. But, you must have some serious leaders or executives also participating who have enough clout to take action or approver budgets for efforts that relate to the pain points brought out during the workshop.

After a brief overview of taxonomy best practices and principles, the participants will be guided into their first efforts at creating a seven category taxonomy plan that describes their organization’s use of information. [Use of mindmapping tools very beneficial at this point.] This can be a very time consuming process as each participant must have a voice, and ultimately each participant must agree on the same exact seven information categories that will make up the top-level taxonomy.

When the taxonomy is finished, the participants will spend time attempting to “break” it and prove it to be inadequate, erroneous and incomplete. If it stands the test, follows best practices, and enjoys the support of all the participants, then the taxonomy is considered valid.

This process can be very exhausting and stressful as it involves getting every participant on the same page and in agreement on the organization’s information goals. However, in the end, it is very powerful to have a diverse group of stakeholders in complete agreement regarding the information goals of the organization and the role of SharePoint in meeting those goals.

Note that the project lead should be very experienced at managing group dynamics to minimize conflict.

The facilitator will then guide the participants through the creation of a project charter and governance plan that describes the methods to be used in implementing the taxonomy plan both technically and organizationally.

[more information forthcoming]

### Roadmapping (Gap Analysis Documents)

Current state

Desired Future State

### Prioritized Action Plans, and estimates and dependencies

[more information forthcoming]

## Site Navigation and Structure

Building out the navigational structure of a SharePoint site can be one of the most politically difficult parts of the project. The reason for this is that the site navigation is not something you want to change very often, and it has to be agreed upon by a fairly broad collection of people. Just because it may be technically easy for you to change the main site navigation later, you really don’t want to do this very often, so you must invest the right level of effort and involve the right people in an exercise

that a lot of people are going to have to live with for a long time.

As much as possible, the goal is to design a site that makes it easy for workers to find the crucial information they need as quickly and efficiently as possible.

You will often find that when you’re working on a corporate intranet project, the navigational structure is driven by the political agendas of the various groups that make up the project team. Most commonly, the key owners (and drivers) include marketing, corporate communications, human resources, knowledge management, and IT personnel. Each group sees the company through a different lens, and each has different priorities. The natural tendency people have when working on their initial pass at the navigational structure is trying to match it to the organization chart. This is a bad idea for a number of reasons:

* It is very common for companies to reorganize from time to time.
* The organization chart structure is one that people have to try to figure out how responsibility is divided before they can figure out where to find things.
* Departmentally driven navigational structure does not help users from different department, or new employees to find things…need time and experience learning the structure, which users won’t have initially.

Must have shared understanding and strategic alignment among the project stakeholders.

1st thing: Get a handle on who the system users are and how they are going to use it. Personas and use cases. Split usually by role and what they expect SharePoint to provide to them.

2nd: Understand the concepts that the people in the company use on a day-to-day basis. Gather these concepts and along with the users, to organize them and help design the navigational structure

Top-level is the first and most important/challenging – usuallly strong political forces trying to dictate what will happen on the top navigation. There is a huge overlap between companies…

Within every company there is still a farily well-known and well-understood corporate hierarchy commonly know as “departments”. You cannot simply eliminate this departmental organization from the IA of the system – withou leaving a lot of people lost because they can’t find content according to a structure they knows exists and are familiar with. Keep in mind that large depts. Or for different audiences, some dept. sites may need an external/public with things like who is the head of the dept., contact information, blurb about the dept. mission what they do, etc., dept. news, easly-to-locate forms and instructions for dealing with that dept. or requesing information. But also an internal/private view, audience is the employees who work within that dept. May incorporate a lot of the external but have more useful day-to-day content that people within the dept./site need to know to do their jobs efficiently.

See: http://www.thesharepointmuse.com/2011/12/lesson-learned-when-you-need-to-use-publishing-in-sharepoint/#comments

## Metadata

We define metadata as the collection of structured information about a document or a piece of content

whatmetadata give us in the context of SharePoint:

* *Findability*: Being able to find a document or item of information easily.
* *Policy*: We can construct our records management policies so they act on metadata values.
* *Process*: We can use metadata to track the state or status of a business process (e.g., not

started, in process, complete, approved, rejected).

## Document Organization and Folder Hierarchies

The old filing cabinet-based metaphor … drawers disk drives, hanging folders, first level big folders, folders and document inside. Imposes constraints of physical object onto electronic data/items that are not physical.

#### Finability and Putability

Structured folder hierarchy can very quickly start to fall apart.

Site Scoping

Audience

Content Owners and Authors

Goals and Why? For site/project

Final Elements

Selected sample of SharePoint focus areas…

Process optimization

Community development

Project management

Change management

Knowledge management

Content lifecycle management

Records management

Enterprise content management

## Search

This doesn’t work in the enterprise world, where searching is contextual in nature and rooted to a specific task, process, or event, which can be difficult for search engines to understand without adequate metadata. In order for search to determine the context of content, a robust information architecture and sufficient categorization of content needs to occur. For many organizations this implies stricter governance around how content is structured, organized, and labeled. This can come as a shock to many end users, who may feel that including additional metadata to content is simply more work without providing them any instant or tangible value. In other words, they don’t see what’s in it for them.

Essential Foundation of the following elements that word in tandem (orchestrated collaboratively to produce search functionality and results).

Information Architecture

Adequate Metadata

Usage Patterns

Governance

Continous Improvement

### Information Architecture

Your SharePoint information architecture is going to help your users accurately determine the context of the content they are trying to find. Everything from site-naming conventions to where your enterprise search center is located and how users get access to search should be simple and intuitive. Ensuring that your content is named correctly, is stored in the correct location, and uses terminology that your users understand will ensure that when the correct search result appears they will instantly be able to recognize it.

### Adequate Metadata

We have seen the importance of metadata in Chapter 3, but what about its importance in relation to search? Without adequate metadata you will not be able to provide the right context to both your end users and the SharePoint search engine for accurate search results. If search is viewed as a mechanism to easily query the metadata and attributes of content, you will begin to see the importance of correct categorization within the organization. In many organizations the problem with their search implementation isn't search per se, it's because they don't have accurate and intuitive metadata on their content so that both the search engine and users can distinguish the correct context.

### Usage Patterns

You need to understand what users are looking for, the context in which they're performing searches, and what their expectations are for the search results they will receive. By understanding these usage patterns, the correct configuration options can be determined. For example, imagine if you know that your users expect to see search results 5 minutes after content is created instead of the default 20 minutes. You can then set your incremental crawl times accordingly. Not all users search the same way, even if they are searching for the same content. By understanding the usagepatterns you'll be able to better target search results to users when they need it.

### Governance

Governance is often overlooked when implementing search, but it should be part of any SharePoint governance plan. Your search governance plan should be composed of the roles and responsibilities around search, the roadmap for search, what content in the organization will be indexed, and how search will be leveraged to achieve business value. Business value is really a loaded term, but you need to know how you will make the best use of search. Will you spend time making experts easier to find or will you spend time ensuring that the most popular content is returned first in search results because you know your users know the content better than experts within your organization? Either way whatever you decide to do with search, you need to know what you are trying to do so that you can

constantly drive toward these goals.

### Continuous Improvement

As with other aspects of SharePoint, your search implementation should be continuously improving throughout its lifetime. With all the tools and tweaks that can be performed relatively easily, a continuous cycle of improvement can ensure you are at least moving in the right direction.

Your continuous improvement plan should have items such as how users suggest new configuration options like Best Bets or Keywords (which we will cover later), how often search should be reviewed, or the criteria for adding new sources of content.

GOJO

Information about GOJO, its goals and objectives, tools and sources of information for daily operations and decision-making.

Corporate Office Administration

M3

Quality Leadership

Strategic Management

(Innovation KFE)

(EST)

(Enterprise Monograph Readiness)

(Stage-Gate Steering)

Officers

Chairman/CEO

President/COO

GOJO Culture

Human Resources

Learning & Development

Workplaces

Operations Administration

Safety

IT

Core Services

Support Services

Business Application Services

Collaboration and Data Services

Intellectual Property/Knowledge/People

Knowledge base that forms the core value proposition to GOJO’s customers

R & D

Administration

Skin Care Science & New Technology

Formulation

Microbiology

Base Business

New Technology and Alliances

Wipes

New Systems Development

New Product Development

Policies and Partnerships

Long-term organizational relationships that provide continuity and strategic information for GOJO and its customers.

Legal and Regulatory

Corporate

Regulatory Affairs

Compliance Systems

Finance

Accounting/Reporting

Accounts Payable

Systems & Information

Credit/Collections

Sales Accounting

Payroll

ERP Project Team

Steering Team

QA Compliance

Product Management - Health Care

Product Management - Emerging Markets

Product Management - Commercial

Sales Operations - Pricing Administration

Trade Marketing

Community Affairs

Processes and Practices

Established business processes, manufacturing strenght, strategies, methods and best practices that enable GOJO to turn static knowledge into meaningful and effective action

Lean Six Sigma

Supply Chain

Global Sourcing

Sales & Operations Planning

Operations Administration

Assembly Facility

Packaging

Assembly Direct Labor

Quality Control

Planning/Scheduling

Cleaning & Sanitization

Mixing

Maintenance

Quality Assurance

Global Quality

Technical Services

Technical Specifications

Incoming Components

Change Management

Global Operations

Consumer Packaging

Value Chain Improvement

Operational Excellence

Engineering Supply Chaing

Formulation

Shipping

Products and Services

Products and service offerings developed by combining and packaging GOJO’s knowledge and business practices for manufacturing product for sale and delivery

Customers and Markets

Demographic groups, markets, other segementation.

Professional Markets Group

Analysis - Professional Markets Group

Marketing - Professional Markets Group

Marketing Services

Product Management

Administration

Wipes

Systems

International

Auto/Industrial

Market Research

Administration - Professional Markets Group

Sales - Office Channel

Sales - Government

Marketing Developement Healthcare

Acute Care

Sales - Medical Supply

Healthcare Leadership

Long Term

Emerging Market Development

Emerging Market Development II

Sales - Foodservice

Professional Market

Sales - Sanitary Supply

Push to Pull

Commercial Sales Support

Sales - Canada

Sales - Corporate Accounts

Administration

Marketing Development Manufacturing

Sales - Industrial Supply

Sales - Textile

Sales - Automotive

PURRELL Consumer

Market Development

Sales

Trade Marketing

Global Business Development

Sales & Marketing

Latin America

Sales & Marketing

Australasia

Sales & Marketing

Administration

Europe

Sales & Marketing

Administration

Japan

Sales & Marketing

Administration

## Identify the Key Players and Stakeholders

Need to get the buy-in and participation of the right people which will have a profound influence on the success of the project. Key members of the organization must be identified as the final decision makers both during the project and after implementation. Two groups: people on the project team, and people who will be on the governance committee.

## Nail Down the Vision

Make sure everyone shares an understanding of what SharePoint is, what is does and what the goals of the project are, including the essential need to be on the same page as the key stakeholders and more importantly that they are on the same page with one another.

## Personas

Important to get a good understanding of who the users are, and create persona profiles representing the different groups that will be using the system in the organization. Does not need to be as detailed a highly focused and marketing driven public eCommerce web site. Include each group’s goals and site priorities. Make to sure to develop in conjuction with stakeholders (both managers and front-line workers) who know the organization well and can fill in the gaps of knowledge about roles and responsiblities.

## Policy/Discovery Workshops

Running the discover workshops with a broad spectrum of teams and roles is essential to the success of the project. You will learn a lot and in the workshops, but as important, you will have seeded the message throughout the organization that people are being listened to, there are ideas are being taken seriously and incorporated, and that there is a competent team running the project that will give them a new solution to improve on what they’ve had.

## Navigation Workshops

Designing the site navigation is one of the most critical elements of building a new site. It is very costly in terms of user confusion and frustration to change a site’s navigation after it goes live. The task has added complexity due to political forces that can impact the process.

Interactively build out the map with the stakeholders. By working interactively you can try ideas and instantly see what benefits and problems the changes cause. Using a visual system enables everyone to see the choices and understand the options. Even if not agreement among all on an item, everyone will understand what decision was made and why. Afterwards the should receive a document with the map so they can review and share with other members of their team or department.

## Clarify Collaboration Strategy

It is very important that your stakeholders understand what the difference is betwwen the portal areas and the collaboration areas. The portal areas are ones that require tight control because the content on display there is meant for broadconsumption and therefore needs to be vetted for accuracy and to ensure it reflects the voice of the firm. The collaboration sites that exist below the line are places where people work together and potentially have many authors.

## Infrastructure

## Search Strategy

## Branding

## Managing Content

Inventory existing content, identify content owners, improve quality and “write for the web”, create and approve content as early as possible…

## Communication Planing and Community Building

## Training, Adoption, and Governance