Microsoft® SharePoint® 2010

SharePoint 2010 Adoption Best Practices

White Paper
September 2010

About this Whitepaper

Microsoft SharePoint Server 2010 provides a vast number of capabilities that empower business users. For example, SharePoint Server 2010 enables users to collaborate on documents with each other, tag and rate content, self-publish, track group projects, and even develop their own productivity solutions. However, even with this amount of power in hand, users (and the organizations they work for) can benefit greatly from having a clear *SharePoint Adoption Plan*. Why? Because SharePoint is often something that users can benefit from, but don't necessarily *have* to use to get their job done.

A SharePoint Adoption Plan describes how the benefits of your SharePoint deployment will be communicated to users and what kind of training you'll provide. An adoption plan helps you establish the following:

- Power Users and Influencers who can "peer coach" fellow users
- A plan for Communications and Buzz
- A Comprehensive Training Plan

In this white paper, you will learn how to plan, organize, and create your adoption plan. We'll also provide some examples of how to integrate your governance plan into the training and communications plans for your solution.

First, let's discuss why SharePoint adoption can be challenging.

The Challenge of Adoption

Even with a great governance plan, a complete collection of credible, usable, and relevant content, and a fully tested solution, you can't just "turn on" the new portal, collaboration, or social computing environment and expect users to come running to embrace the new solution with open arms. Your adoption plan needs to capture both the hearts and minds of the user community to ensure that the solution will be successful.

What is SharePoint, Exactly?

SharePoint 2010 provides an information-sharing platform, document management platform, workflow platform, business process management framework, and development foundation on which information worker solutions can be created. Comprehensive business solutions can be easily assembled to support a company's information management and business needs. However, one of the great difficulties with regard to adopting SharePoint is the fact that, the above description notwithstanding, SharePoint can be very difficult to describe to users because it encompasses so many applications, uses, and functions. Users often have many alternative ways to achieve the same outcomes as they do with SharePoint. For example, there are several options users can choose for sharing a new document – posting it to a SharePoint site is one possibility, but so are e-mailing as an attachment and saving to a file share. You'll want to make sure that users have a clear path regarding the use of SharePoint even for the simplest of tasks.

Figure 1: The [SharePoint in Plain English](#) video describes a few of the benefits of using SharePoint.

Build It and They Might Come

One of the most important lessons we learned from deploying SharePoint 2007 was the importance of including end users in the design of the solution. Understanding their information sharing challenges and key business "pain points" are critical to solution success. However, even if you include users in all aspects of solution creation, the solution you create will almost always involve changes to the way that people do their jobs. And basically, almost all change is perceived as bad – even if it's good! This means that your adoption plan needs to recognize how difficult organizational change can be and leverage a variety of approaches to facilitate user adoption. Essentially your adoption plan is really a plan for effecting change and, as you will recognize when you read this paper, your adoption plan is really a plan for change management.

Figure 2: Change in an organization is comprised of 3 elements: people, process and tools. It's an iterative process of communicating change, training people on new skills/tools/processes, and gathering feedback for future improvements.

Most of the approaches that you will use to ensure user adoption of your SharePoint solution will involve two critical components: communications and training. We will talk about these two areas in detail in this white paper. Almost everything you will do in your adoption plan will have some element of these two critical areas. In addition, however, your plan needs to address how you will migrate from your current solution to the new one and how you will support your users both during the transition and after the new solution is implemented.

To ensure that you are building a solution to which users will come, your adoption plan needs to be carefully thought out and, most importantly, written down. As Michael Sampson writes in his excellent book, *User Adoption Strategies*, there are several key benefits to having a written adoption plan:

- It makes you think.
- It gives you something to share.
- It involves other people.[1]

If you know you have to produce a written deliverable, you know you will have to carefully think about what you are going to do. This is important. The least successful user adoption strategy for SharePoint solutions is one we call: "throw it over the fence and see what happens." Even without reading Michael's book, you can probably imagine why this strategy is pretty much doomed. The sad thing is that it is "applied" in way too many organizations. When you have a written plan, you have a document that you can review with others. More review means more ideas. More ideas mean more people are engaged. More engagement results in greater user adoption. In other words, you will build it and they will come.

[1] Sampson, Michael, User Adoption Strategies: Shifting Second Wave People to New Collaboration Technology (The Michael Sampson Company Limited, 2010), 227.

Must-Have Elements for Your Adoption Plan

There are a number of key steps that you should consider as part of your adoption plan. You don't need to implement every single one of them, but you should evaluate each of them carefully to determine whether they apply or the degree to which they apply in your specific case.

- Make sure that you've successfully incorporated the technology components that help drive adoption.
- Start small and grow with the culture.
- Implement a Training Plan.
- Implement a Communications Plan.
- Decide on a Content Migration Strategy.
- Have a User Support Plan.
- Provide Incentives and Rewards.
- Enable End-user Feedback.

Let's take a look at each of these in more detail.

Make Sure that You've Successfully Incorporated Key Technology Components

In order to maximize your adoption of SharePoint, you need to make sure that your project includes not only the obvious technology elements (hardware configuration, custom software components, SharePoint configuration tasks) but also the business-focused elements as well, such as a well-designed information architecture and social computing strategy. Four key areas that provide the foundation for user adoption include:

- Information Architecture (including content and navigation organization and branding)
- Search (users will expect to find what they are looking for via both search and navigation – you need to plan for both "findability" strategies)
- Term Store (for easier tagging and improved search results)
- User Profiles (to leverage the social aspects of SharePoint to your advantage)

Information Architecture

Information Architecture is a strategy and plan for information delivery and access. It describes how information managed in SharePoint will be organized and how users will navigate through the environment. A library catalog is a classic example of an information architecture. Content is assigned to one or more topic headings (for example, Fiction or Mystery) but also has additional properties, such as Author Name, Title, Publishing Date, and Publisher. Another example is an online music library that stores metadata such as Genre, Artist, Song, and Publisher. In an online catalog, content can be accessed or queried using any one, or often several, metadata values.

Your information architecture helps users find content in your SharePoint environment the way a library catalog helps you find information in a library.

- It supports browsing for information because it defines the overall structural organization of the solution and presents consistent navigational structures.
- It supports searching for information because it defines a content classification scheme that presents consistent labeling and enhances search engine accuracy.

Information architectures should be driven by purpose. A well-designed ontology (where information is stored) and taxonomy (what it is called) increases the likelihood that users will find what they are looking for with minimal "clicks." An effective information architecture is a tool that will assist users in understanding and interacting with the solution, and can mean the difference between users quickly embracing the new technology, and users becoming frustrated and disengaged.

Your information architecture helps users find information in any of three scenarios:

- I know it exists and I know where it is.
- I know it exists, but I don't know where it is.
- I don't know if it exists.

Thus, the goal of your information architecture (IA) is "findability," and another key factor in findability is search.

For more information, read *Governance Features in SharePoint 2010* and the *SharePoint 2010 Governance Whitepaper*.

Search

The Internet is changing the way users expect to find information. Users expect to be able to go to a search box and enter a keyword or two and be taken directly to the information they need. So they have high expectations for Enterprise Search capabilities. SharePoint has a great platform for search, including features like click-through relevancy and metadata-driven refinement, but you'll still need to invest in the mechanics of ensuring that common search queries in your organization map directly to the sites and content that users want. Make sure you survey users to get their opinion on what they *expect* to see when they enter a search keyword – don't just assume that whatever gets served up in search results is 'correct' – search relevancy optimization is an ongoing process.

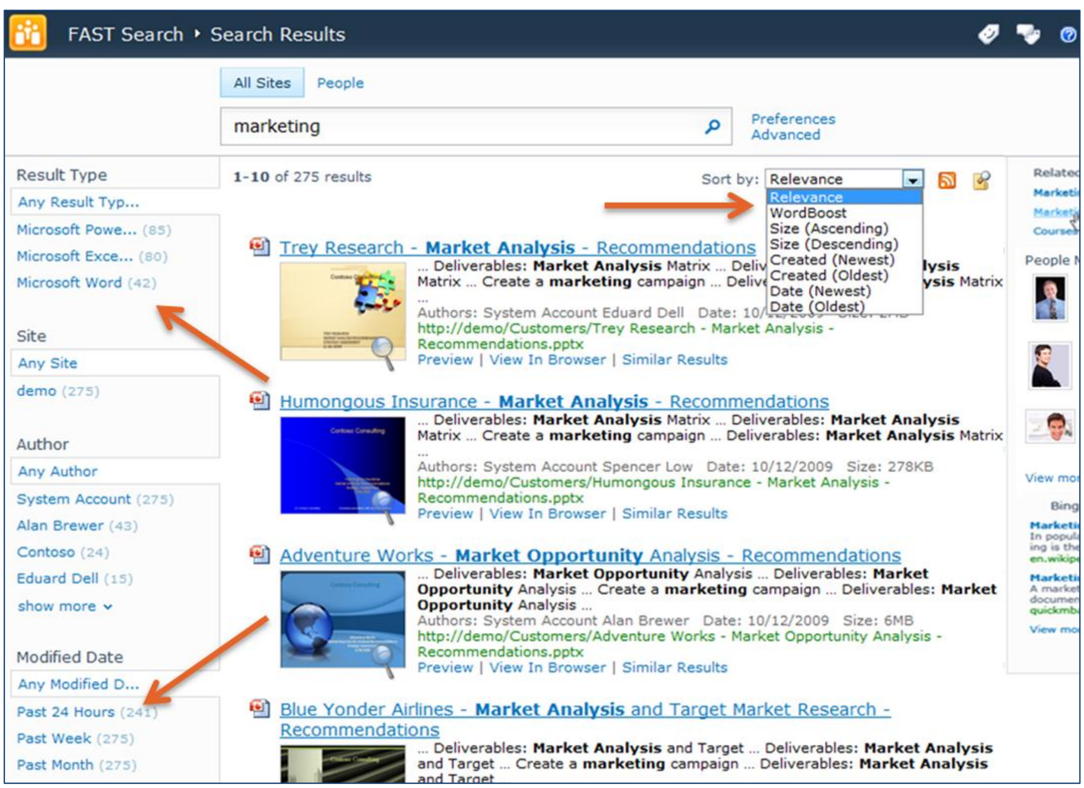

Figure 3: SharePoint Search provides some help with "findability" of content through metadata refiners.

It’s not really possible to separate search from your information architecture. The metadata strategy in your information architecture is what enables search to work. Today, many intranet users are frustrated by their enterprise search experience. The number one complaint we hear from organizations investing in new intranets is that “search doesn’t work.” The fact is, it’s not that search doesn’t work, it’s that the information architecture doesn’t include any metadata to help search work optimally. In SharePoint 2010, we have a new information architecture element that helps implement the IA and improve search results: the term store.

Learn more about SharePoint Search at the Enterprise Search Resource Center.

Term Store

One way to ensure that content is discoverable is to make sure that it’s *tagged* properly. One way to ensure proper tagging is to provide users with a shared, consistent set of terms to use in their tags. *Term sets* are groups of related terms. In SharePoint 2010, the *Term Store* is used to manage terms and term sets so that users can pick from a pre-defined list of values. With appropriate permissions, certain users can use the *Term Store Management Tool* to perform the following activities:

- Create a new term set or delete one that's no longer needed.
- Add, change, or remove terms.
- Create a hierarchy for terms, identifying which terms in the hierarchy can be used to assign tags to content and which are just used for grouping other terms. (You typically will want to use only the "lowest level" in the term hierarchy for tagging.)
- Define alternate terms (authorized synonyms). If users use different terms for the same thing, or you introduce a new term to replace an old one, taggers will be able to use their familiar terms to find a tag, but the authoritative term will actually be assigned to the document.
- Import terms from an existing list. Unless you only have a few terms to add to your term set, you'll probably want to use the import capability to add your terms. You act on each term independently in the Term Store Management Tool; while it's convenient to use this tool for updates to existing terms, you won't want to use it to add a large collection of terms.
- Change managed keywords into managed terms by moving them into a term set. This capability allows you to evolve your managed terms over time. In other words, you don't have to make yourself crazy trying to define all your managed terms up front. You should invest some time to plan your initial managed terms, but you can change your mind later. However, you'll need to assign someone to pay attention to how keywords are being used across the site.

Investing in the term store will go a long way in ensuring that your user's tags are consistent and that the overall user experience is improved.

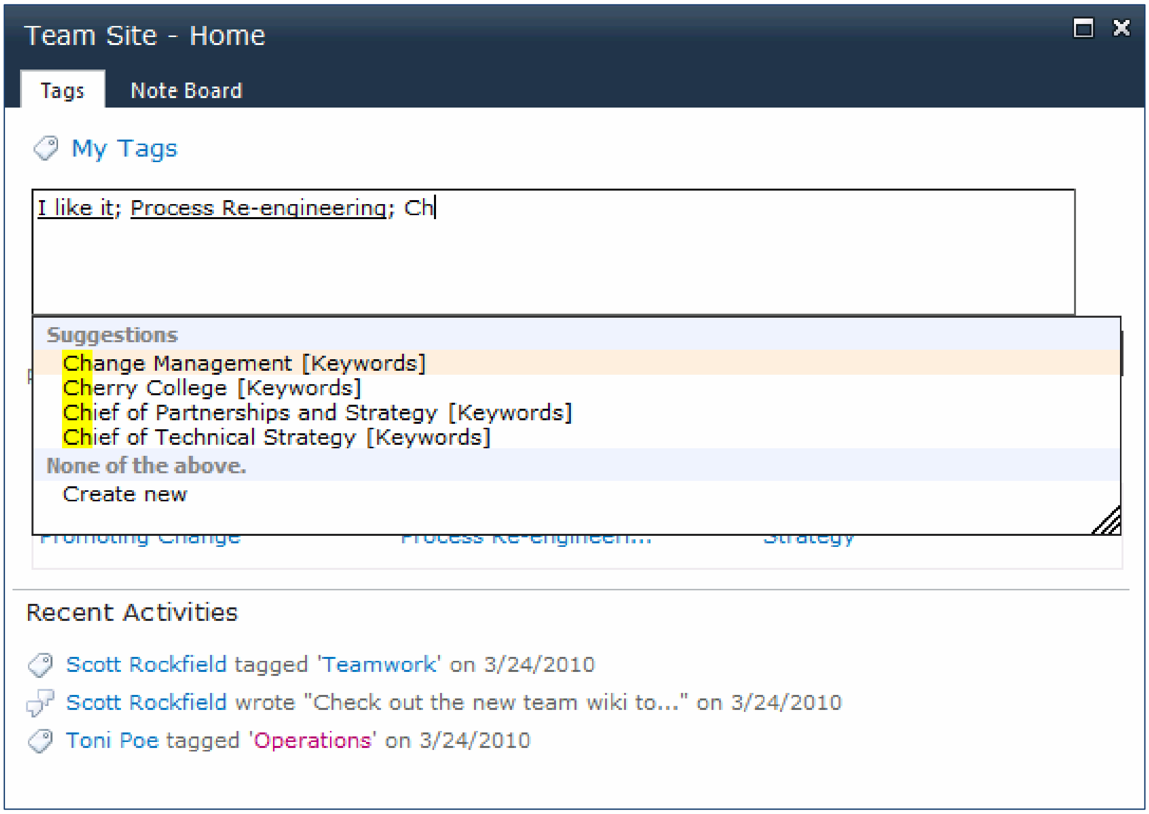

Figure 4: Tags help people find information across the enterprise.

Read about [Planning Managed Metadata in SharePoint 2010](#).

User Profiles

When designing a solution for business collaboration and social computing, it is important to think about a 'social identity' that represents each user in the organization. This identity, which lives in SharePoint Server, is typically an aggregate of data from directory sources such as Active Directory® Domain Services (AD DS) and other business systems.

Providing a social identity enables the users of your solution to:

- Gather insight into other users based on their social network, such as informing them about what the people they know are doing.
- Provide social feedback in the form of ratings, comments, and tags.
- Find an 'expert' – a mechanism that provides a way for users to locate a person within the organization based on profile attributes.
- Provide an accurate organization chart so that users know the reporting structure.
- Display items such as human resources news, based on the user's organization and business role within the company.
- Show a picture of your users in Outlook via the social connector.

If you plan to use social computing features, such as My Site Web sites or People Search in Microsoft SharePoint Server 2010, you will likely want to integrate profile information that you have stored in a directory service such as Active Directory Domain Services (AD DS) or a business system such as SAP or Siebel, with SharePoint Server 2010. By using Profile Synchronization in SharePoint Server 2010, you can do exactly that. User profiles allow you to search for and connect with people within your organization, based on information published about them. SharePoint Server 2010 provides a search scope for searching people. Be sure to invest in your social strategy, as it can go a long way towards helping user adoption. Here are some key things to consider in developing your social strategy:

- As with any other new technology, to be successful with social computing you need to have a business problem to solve. Be sure that your SharePoint strategy includes business problems that can be solved with social computing features.
- Social computing features can be both fun and also provide a compelling way to encourage collaboration and sharing. Don't be afraid to go slowly with "baby steps" as you deploy social computing functionality in your organization. Identify early adopter people and projects and take the time to collect user stories that build both the business case and value proposition for these features.
- Don't allow perceived risks to stop you from trying this functionality. Provide basic ground rules, plan carefully, and remember that it's really hard to find any good examples of horror stories of social computing disasters inside the enterprise. Unlike the public internet, if inappropriate or inaccurate content gets posted, you can easily take it down. Moreover, if you are careful about ensuring that your users have the appropriate information literacy skill to distinguish between authoritative and opinion content, your actual risk should be minimized.
- Don't try to look for hard and fast ROI on your social computing investment, but look for progress towards your overall business goals, which might include a reduction in e-mail traffic or an improved business process.
- Above all, be patient. Organizational change takes time. Plan a persistent communications plan and tolerate a few mistakes (it may not be easy to get adoption of every feature so you may have to try a few different approaches).

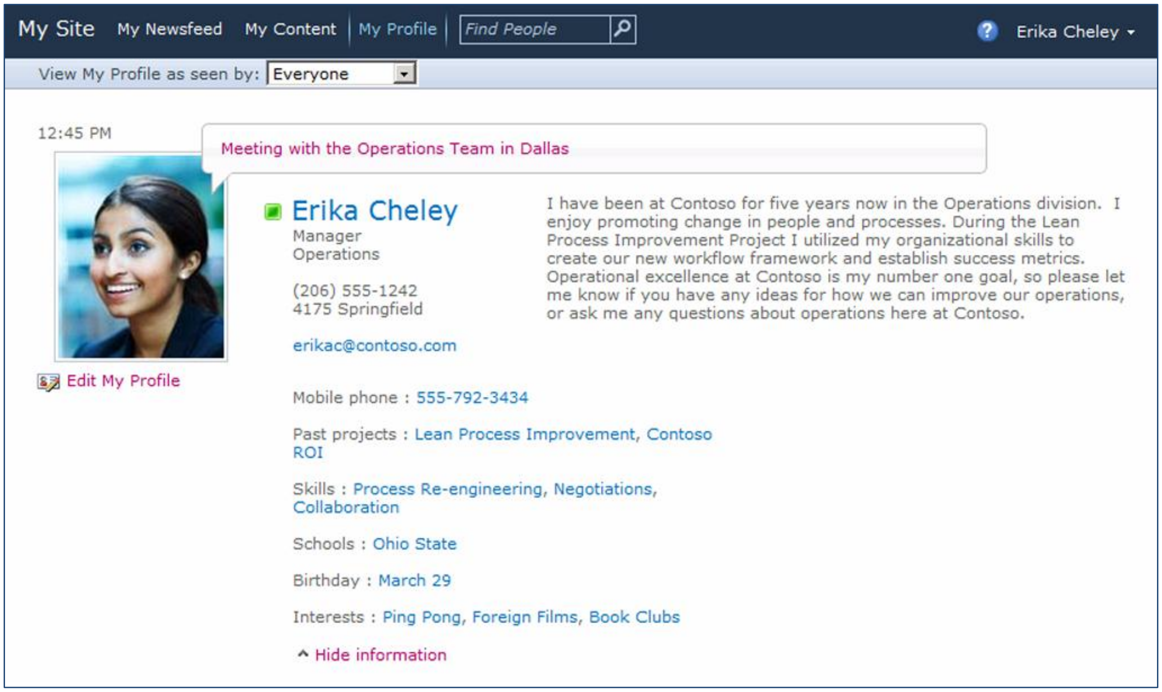

Figure 5: Employee My Site profiles are useful to connect people across the enterprise.

Get an overview of SharePoint 2010's User Profile Service.

Start Small and Grow

It is extremely easy for a potential user to become lost under the tsunami of features, applications, and content management potential that even the most basic, out-of-box SharePoint installation offers. One key to a successful adoption strategy is to start small, rolling out only one or two features initially or deploying a more comprehensive solution to a small audience. As user familiarity and confidence with the product increase, you can roll out new features incrementally or extend the solution to a wider audience. As such, you'll want to chunk your deployment and rollout into phases, with each phase outlining another collection of capabilities that your users will be able to take advantage of. For example, you might break your SharePoint rollout into three phases, categorized by the relevant workgroups:

- Phase One: Base Information Architecture, Branding, Intranet, Search
- Phase Two: Team Sites, Document Management, Social Computing
- Phase Three: Forms and Workflows, Business Intelligence, Records Management

Training

SharePoint 2010 can be a very intuitive product for some users, but this will definitely not be the case for all users in your organization. While the flexibility of SharePoint can be a valuable selling point, in the hands of an inexperienced designer, your site can be much less intuitive for your users. Be careful not to underestimate the amount of training users will need – especially users with site design permissions, even if their sites are only used by a small group of people. However, keep the following in mind: if your solution requires extensive training for the typical user, you've probably made some fundamental design mistakes. As a general rule, your goal is to design solutions that require minimal training for the majority of use cases.

Your training strategy should encompass all aspects of your new solution – not only the SharePoint 2010 technology but also business processes impacted by SharePoint 2010. Users who are very familiar with MOSS 2007 will be especially interested in learning about things that have changed in SharePoint 2010, so a critical component of your training plan will need to include specific "upgraded features" training for those users.

This section will discuss the following key elements of your training plan:

- Approach: examples of successful training approaches that can be considered for your training plan
- Timing: when should training be offered
- Audience and Content: who should be trained and what training content is appropriate for each audience

Approach

Develop a training program for SharePoint 2010 that carefully addresses the specific needs of each constituent community based on their role in the organization and their role in the context of the solution. If you implement personal sites (My Site), all users will have Contribute (or edit) permissions for at least that area of the portal. This means that every user in the organization should know *something* about best practices for organizing information. However, not all users will have the same level of interest so your training plan will need to be adjusted accordingly. While you may *think* that everyone wants to learn everything that they can about SharePoint, in practice, this doesn't always turn out to be the case. Think about how you can structure your training plan so that you offer multiple "levels" of training for users with varying degrees of both interest and time. One successful approach that several organizations have adopted is to create a "SharePoint Basics" offering that introduces all users to the solution, shows them effective search techniques, and explains the basics of your content organization and site navigation schemes. This introductory topic shouldn't require much more than about an hour to deliver. The Basics offering can then be supplemented with additional training content based on user interest and role. Additional offerings can include topics such as "What's New from SharePoint 2007", "Best Practices for building a Team Site or Portal", "Security and Permissions", etc. If you have non-technical users who will be given "full control" or design privileges on a SharePoint site, it is important to empower them with site design best practices training, not just how to use SharePoint features. These new "site designers" should be familiar with the guiding principles documented in your Governance Plan and information architecture fundamentals.

Timing

Training for SharePoint 2010 is ideally scheduled immediately prior to the launch of your new solution and on an ongoing basis as users need new and expanded skills. Some users, particularly users who are responsible for loading the initial content, will need to be trained (either formally or informally) prior to the start of content conversion. The majority of users, particularly those with read-only access, should be trained just before or at the time of your solution launch.

One of the biggest training challenges, of course, is figuring out just what users need and just when they need it. There is no single best answer to this challenge because each solution is different. It's really hard to figure out what is "just enough" when it comes to training for SharePoint. It depends on the user's role, how frequently they will use the skill, and a host of other factors, including their learning style. If your user community includes a significant number of engineers or scientists, it is likely that no matter how much or how little you teach them about SharePoint, they will try and figure out what else it can do! As you plan training, the important thing to remember is that you want to engage the natural curiosity of your user community before they propagate a "wrong" or ineffective approach by exploring on their own. We've seen too many cases where eager end users "discover" a feature and share it with their colleagues even if there is actually a much simpler or more effective feature for that problem.

Multi-day instructor-led training may be useful and appropriate for some of your power users and administrators, but for the majority of your users, you will need to consider frequent, "mini-training" events that allow users to consume training "just in time," as they need it.

Here are some suggested approaches for "just in time" SharePoint training:

- SharePoint Basics: online or in-person brief introductory training to be offered in conjunction with the launch of your new solution and then at additional intervals for new employees or people who want a refresher.
- SharePoint In-depth: online, topic-based training by SharePoint training companies or "on demand" training from Microsoft Office online. These lessons should be short, topic-focused training videos or online training that can be delivered to users just as they need the knowledge, and in the course of doing their work. The ideal training modules require no more than 10 minutes to "consume" and can be accessed by users as they are trying to accomplish a specific task. While you can certainly develop these modules on your own, it's worth checking out the existing offerings, even if they reflect a "generic" SharePoint solution. In some cases, you can work with the solution provider to customize the materials for your specific implementation.
- SharePoint Documentation: online or in print form. Some users will not be comfortable without written documentation and may learn better by reading the information. Many successful organizations create a document library or site for "generic" user documentation for key tasks such as uploading and assigning metadata to documents or changing security permissions that they make available to teams to use "as is" or customize for their sites. Others create formal documentation only for tasks or processes that are customized in their deployment. Still others "create" documentation for their environment by linking to existing Microsoft documentation on the various SharePoint features. As you think about the approach that will be most successful in your organization, keep in mind that to be useful, your documentation needs to be consumable. This means that you should think about small documents rather than 20 page "books" that no one will ever read. In addition, remember that to be valuable, documentation should be delivered in the context of where users will do their work. For example, on a page where a user will submit a form, provide a link to the document describing "how to submit" the form.
- Recurring training events such as regular meetings or "lunch and learn" sessions: one very successful organization implemented a regular "Get Sharp on SharePoint" weekly training event. Each week, they planned and delivered a 30-minute online meeting focused on a unique SharePoint topic such as search, creating your personal SharePoint site, assigning metadata, etc. The first 15 minutes of the meeting was typically devoted to a presentation and the second 15 minutes provided an opportunity for participants to ask questions and share experiences (either on the topic of the day or not). Each meeting was recorded so that users could re-play the video at any time. The combination of real-time, online topic-based training plus recorded playback was extremely effective in both introducing and reinforcing key topics. Since the topics were publicized as part of the communications plan, users could plan their participation based on their interest and workload.
- "Office Hours" consulting sessions: several companies offer recurring "drop in" help centers where users can bring their SharePoint design or usage concerns to their internal SharePoint experts. This effectively provides one-on-one private training to supplement other "just-in-time" training offerings.

While not always considered part of training, another key resource for "just in time" training is your Power User Community and SharePoint Center of Excellence team. A powerful way to deliver training just at the moment that a user needs it is to offer a "live" person for quick questions. Creating an "Ask the Experts" discussion forum, establishing a "best practices wiki with a searchable repository of tips and tricks, publishing a list of SharePoint subject matter experts in your own organization, and adding links to SharePoint training in your default site templates can also help support your training program. Remember the following key points about your training plan:

- One size does not fit all. Training needs to be targeted to the end user's role in the organization and role or responsibility with regard to the solution.
- You need to adapt to the learning style of the learner. Educational experts know that not everyone learns in precisely the same way. This is especially true for busy adults. You will get the best outcomes from your training initiatives if you can offer training in multiple ways: classroom, online, "just-in-time" via computer-based training (CBT) or short online videos, quick reference "cards," etc.

Audience and Content

While you will definitely need to develop a training plan that is specific to your organization's needs, you will not always need to develop training material. There are many commercial SharePoint training offerings as well as documentation and online training that is available at Microsoft.com (see some examples at the end of this section). Training should be tailored to how each constituent community will use SharePoint 2010 to do their job. To maximize the effectiveness of your training plan, you may want to consider training a few employees from each department or business unit or office in a "train the trainer" scenario and ask them to train their peers. You may also want to identify some initial candidates to become "power users" of SharePoint 2010 and consider providing additional, in depth training for these individuals. Ideally, the "power users" should be distributed across the organization so that they can provide first level support and ongoing training to members of their local department, business unit, or office.

Each organization will have unique business roles that may require specialized SharePoint 2010 training. Don't kid yourself – certain types of users will absolutely require custom approaches to training. For example, in a law firm, you should not plan to deliver the same training to both partners and paralegals. In a hospital, clinicians and administrators will probably have different training needs and learning styles.

In general, there are three types of user roles for a SharePoint 2010 solution: Visitors (readers), Members (contributors), and Owners (designers). These roles are generally described using SharePoint 2010 terminology for the permissions that users have on a given page or site.

- **Visitors** have "read only" permission for the specific page or site – at least for the "authoritative" content. One of the unique training challenges for SharePoint 2010 is that you may have certain types of content (for example, social tags or ratings) that any user can add to a page or site, even if they only have "read" permissions for the primary content. These users will need training in when and how they should add social content as well as, and even more importantly, training in the organizational governance policies for this type of information.
- **Members** generally have both "read" and "contribute" permission. These users will need the same training as Visitors but must also understand how to add content and how to assign metadata to contributed content and the governance policies for content contribution.
- **Owners** typically have "design" permission, which means that they have the ability to modify the structure, lists, libraries, and content metadata for the site in addition to being able to add content. These users need a comprehensive set of "how to" training for SharePoint 2010 as well as a complete understanding of all of your governance principles and policies. In addition, any user with design privileges needs to understand some basic information architecture and web site usability best practices.

The following table summarizes the basic training requirements for each general SharePoint 2010 role.

Summary of Suggested General Training Requirements for "Out of the Box" SharePoint Roles

Training Concept	Visitors	Members	Owners (Site Designers)
Overall navigational and content structure of your solution	✓	✓	✓
Basic concepts of your Governance Plan (for example, guiding principles for use, responsibilities for content accuracy)	✓	✓	✓
Basic security concepts (permission levels)	✓	✓	✓
How to set personal settings (regional settings, etc.)	✓	✓	✓
Navigational Concepts (tabs, breadcrumbs, links, "back button")	✓	✓	✓
Overview of common web parts in your solution (as applicable): Calendar, Document Library, Tasks, etc. Be sure to review not just what each web part does, but how you are using the web part and the business benefit it provides	✓	✓	✓
Personalizing views and setting up alerts	✓	✓	✓
General best practices for search as well as key search features (such as best bets) and leveraging metadata filters in document libraries. Ensure that users understand best practices for finding content when: • I know it exists and I know where it is • I know it exists but I don't know where it is • I don't know if it exists	✓	✓	✓
Introduction to social computing best practices	✓	✓	✓
Uploading documents and applying metadata (include best practices for file naming)		✓	✓
Updating and deleting documents (implications of deleting documents, best practices for "editing in place," when to create a "document set," etc.)		✓	✓
Best practices for creating web content – your organization's "Style Guide" (which may already exist for your intranet or web site)		✓	✓

Training Concept	Visitors	Members	Owners (Site Designers)
Details of your Governance Plan – especially focusing on design principles, policies, standard design frameworks			✓
Information Architecture best practices (how much metadata is "enough," when folders are appropriate, page layout best practices, best practices for creating new "nodes" in your navigational hierarchy, etc.)			✓
Comprehensive SharePoint 2010 "how to" training (features and functions)			✓ Note: not all Site Designers may have privileges to completely structure a new SharePoint site. It is likely that it will not be necessary to provide detailed feature training for every Site Desginer.

The following table lists additional "advanced" training topics that should be offered for special solution roles and other users based on interest and business need.

Summary of Suggested Special/Advanced Training Topics for Special SharePoint Roles

Training Concept	Power Users	Content Stewards
Information architecture best practices, particularly focused on document and content metadata		✓
Comprehensive SharePoint 2010 "how to" training (features and functions) – you may want to consider formal, in-person training for Site Designers and perhaps offer web-based training for Power Users	✓ (Based on interest and job relevance.)	

You'll also want to consider other roles that you might need in your organization, such as Analysts (BI, reporting), Process Operators (workflow, forms), and Community Managers (social). Be sure to consider all of the possible roles and provide the appropriate training for each.

Another key role that you should be sure to consider in your training plan is your Help Desk. You will need to factor the skills and abilities of your Help Desk personnel along with the Service Level Agreement expectations of your end users when you consider how much training to provide Help Desk personnel. If they will be expected to answer "how do I…" questions, then they should have the same training as your Site Designers. If they will primarily answer "access" questions and transfer more specific SharePoint questions to a solution-specific expert team, then this may not be necessary. However, just like any new solution, you need to be sure that your Help Desk is prepared to provide support as soon as you launch. Be sure to consider Help Desk personnel training up front – not as an afterthought.

Other Training Resources:

- SharePoint 2010 Help and How-To on Office.com
- Learning Solutions for SharePoint from Point8020
- Mindsharp Training Courses
- Aivea SharePoint Training Services
- Critical Path Training
- And many more!

Communications

Don't assume that your new SharePoint 2010 solution is going to launch itself – a Communications Plan is absolutely essential for successful solutions. One mistake many organizations make is that they leave communications planning to the end of their project plan and forget to engage the internal marketing and communications team early enough in the project so that they can have an impact. The other big mistake that organizations make is assuming that communications planning is over once the solution is launched. A good communications strategy must be persistent; until your solution is embedded into the fabric of your organization, you should use every opportunity to promote awareness of both the features and benefits of the solution. Everyone in your organization is listening to the same radio station: WIIFM (what's in it for me). Your persistent communications plan needs to ensure that you are constantly promoting the value of your solution to each of your constituent audiences, so that everyone understands how your SharePoint solution makes their jobs easier.

The communications strategy should promote both awareness and the value of the new SharePoint 2010 solution. Your Communications Plan will likely include some awareness activities that begin during design, but the majority of activities will begin just before you are ready to launch the solution and continue on after launch. Communications activities must also be an active part of sustaining user acceptance throughout the entire life of the solution and thus, your plan needs to include not just communications when the solution launches, but also ongoing activities that keep the portal and collaboration tools "top of mind" throughout their lifetime. As you begin to think about your communications planning, be sure to do the following:

✓ **Work with your Communications Team**
Leverage existing expertise and experts to help develop your Communications Plan. Work with your internal communications or marketing teams to develop both communications messages and materials. Consider what activities and messages have worked in the past and think creatively about new ways of engaging users and solution contributors.

✓ **Use existing Communications Channels**
Leverage existing newsletters and "town hall" or business unit meetings to deliver key messages about the solution, collaboration tools, and other productivity initiatives. You can also demonstrate the solution "live."

- ✓ **Get Executive Sponsorship**
  Draft a memorandum for the CEO or similar high level executive to send when you are ready to launch. Encourage influential executives to talk about the solution and better yet, use the solution for information distribution instead of sending e-mail. One successful organization found an executive who decided to refuse to respond to email messages that included attachments that should have been added as links to documents in the portal. When he got an e-mail with an attachment, he politely replied to the sender that he would read their e-mail when the attachment was referenced as a link to a document in the portal. This helped rapidly enforce the "one copy of a document" and "no more email attachments" guiding principles. Active sponsorship by key business executives can go a long way towards getting users over initial reluctance to try the new solution.

- ✓ **Tailor messages to each target audience**
  For example, you may want to tout the mobile access features and offline synchronization benefits to Field personnel, versus messages about back-end system integration capabilities to Home Office personnel. The same user will leverage the solution for different reasons at different times and the communications plan should address these different scenarios. An attorney in a law firm will play the role of "employee" when she uses the company portal to update the beneficiary of her 401(K) plan. However, the attorney will approach the same portal as a business stakeholder when she uses the portal to find last month's billing for her current clients. Make sure that both the communications medium and the message are targeted to your audience and the roles they play in the organization. In the attorney example, this might mean designing a communications message for all employees that reminds users that the company portal can be used for basic HR self-service. In addition, this could also mean designing a completely separate message targeted to just attorneys that describes how Attorney Smith used the portal while on the phone with a client who was requesting additional work to quickly identify that this client was 60 days past due and that this timely information resulted in an immediate collection of the past due amount. Work with key individuals within each business group to ensure that your messages and the communication channels are appropriate for their locations and roles.

- ✓ **Get users excited and interacting with the solution**
  Consider a fun activity – such as an intranet scavenger hunt – to get users excited about the new solution. For example, one organization created a portal treasure hunt that provided participants with a list of 10 questions whose answers could be found by either searching or browsing for content within the solution environment. One question asked users to find the author of a specific document published to the portal. Another asked users to find out what would be offered for lunch in the cafeteria on a date two weeks into the future. A third question asked users to identify whom to call for questions related to medical benefits. Users who turned in correct answers for all 10 questions were entered into a drawing for a dinner for two at a local restaurant. The activity not only promoted the new intranet, but it also walked new users through some valuable information seeking activities for which the solution could provide quick and accurate results.

- ✓ **Go Digital!**
  Eliminate any paper-based or email distribution for regular reports or targeted communications, etc. if they can be found on the portal. For example, you may want to consider eliminating paper-based newsletters if you can use the portal to create targeted news items or simply post the existing newsletter to the portal and allow users to print it only if they want a paper copy. (This will not only help drive users to your solution, but it will also help support your organizations "green" initiatives!)

- ✓ **Provide a "killer app"**
  Promote enthusiasm and eagerness by including high value content and functionality in the first release. One important activity is to ensure that you have correctly identified a "killer application" and critical content for the first release of SharePoint 2010. This will be a key component of your plan if you are migrating from MOSS 2007 because users will want to understand the benefit (to them) of the upgrade. Be sure that you are implementing at least one type of content or application that users really want and have not been able to get before – this is the "wow" factor that helps encourage user adoption. For example, your portal might include a dashboard integrating information from different applications that provides a comprehensive view of a customer or an account. Your portal might also include a collection of links to all of the resources a new employee needs to quickly get up to speed in your organization. Identify valuable content or applications that users can only get on the portal to encourage users to try it. Design specific communications to promote the use of this content.
- ✓ **Solicit feedback**
  Manage user expectations about what SharePoint 2010 is and isn't, emphasizing that it is a platform that is designed to evolve over time. Communications vehicles should emphasize and reiterate this point. Communications should focus on the objectives of this first release and ask users to provide feedback regarding metadata (did we get it right?), satisfaction (are users happy with the end-user experience and can they find what they are looking for?), and training (do we need more?). Make sure you have a contact on each page so users know who is responsible for content.
- ✓ **Provide ongoing communications**
  Remember that communications is an ongoing activity – you need to think about messaging beyond the initial launch, after the solution is operational as well. It will be difficult for your users to learn and appreciate all of the features of SharePoint 2010 in a single newsletter or training class. An ongoing communications effort provides additional opportunities to promote the features and functionality of SharePoint 2010 as well as your specific implementation.

A good Communications Plan identifies the method, the message, and the audience for each element. A good plan also includes activities for multiple phases of solution development, including messages that you may communicate during design, pilot, launch, and post-release. Use the table structure below as a starting point for developing your own communications plan. You can consider some of these suggested activities as well as others that are specific for your organization. Note that each activity suggested here has been successfully deployed in at least one organization. You will need to consider whether or not these activities might work in your organization but try not to limit yourself to what has been done in the past. Think about the culture of your own organization as you consider various options.

Communications Activities for New SharePoint Solutions

Article in Newsletter

Description	• Brief article (with no major commitments regarding timing) that talks about the plans for the new solution
Audience	• Organization
Key Messages	• Acknowledgement of stakeholders who participated in the initial interviews • Key benefits of solution • Status of project • Initial deployment plan – where we are with pilots, etc. • Expectations for new processes • For more information call …
Expected Outcomes	• Awareness raised about the project • Expectations managed regarding enterprise roll out and impact on individual users
Timing	• During design

Presentation at Leadership Team Meeting(s)

Description	• Brief presentation and demo of new solution
Audience	• Organization Leadership
Key Messages	• Solution will deliver real business value to departments • Search works! • Navigation adds value • Examples of business value demonstrated in early pilot experiences
Expected Outcomes	• Build awareness and commitment • Build enthusiasm for using the solution • Gain commitment for supporting solution launch
Timing	• Likely to be towards the end of the pilot

"Scavenger Hunt" (or similar activity)

Description	• Fun and engaging activity to get users to try the portal. Could have a prize or prizes at the end
Audience	• All of Organization
Key Messages	• Solution is here • Solution is useful • Solution can help you be more effective in your job
Expected Outcomes	• Increased awareness, enthusiasm • 50% participation (example only)
Timing	• At launch

Offer Desktop Wallpaper Featuring an Image New Solution

Description	• Wallpaper graphic to offer to users to put on their desktops
Audience	• Organization
Key Messages	• Awareness of portal
Expected Outcomes	• Increased awareness • Increased usage
Timing	• Send a link to users (can repeat as necessary)

"Give-away" – For example: laminated "cheat sheet," magnet, Post-it pads, chocolate bar imprinted or wrapped with the solution logo (a personal favorite, even if it only has a temporary existence)

Description	• Tangible item to remind users to try the solution
Audience	• Organization
Key Messages	• Solution is here • Solution is useful • Solution can help you be more effective in your job
Expected Outcomes	• Increased awareness
Timing	• At launch

Posters in Break Rooms

Description	• Poster or flyer posted in break rooms promoting the portal and usage scenarios
Audience	• Organization
Key Messages	• Solution is here • Solution is useful • Solution can help you be more effective in your job
Expected Outcomes	• Increased awareness
Timing	• At launch

Survey (use SharePoint survey web part)

Description	• Online survey to gather feedback regarding solution usage and value
Audience	• Organization
Key Messages	• Management wants to hear from users
Expected Outcomes	• Useful feedback • Increased buy-in from users
Timing	• 30–60 days after launch

E-mail to All Content Stewards/Site Owners

Description	• Memo to Content Stewards to provide reinforcement about the importance of keeping content current and relevant and following best practices
Audience	• Content Stewards
Key Messages	• Check your sites on a regular basis – look at content itself and metadata assignments
Expected Outcomes	• Improved content management • Better search results
Timing	• Monthly

Demonstration at "All Hands" Meetings

Description	• Brief demo and presentation about the solution at face to face meetings that occur during the first few months after launch
Audience	• Organization
Key Messages	• Solution is live! Opportunity to deliver value to your organization • Demonstration of key features – improved search, etc.
Expected Outcomes	• Awareness and commitment to using the solution
Timing	• As opportunity is identified

Intranet Promotion within the Solution

Description	• Promote the portal within the portal using content on the home page
Audience	• Organization
Key Messages	• Feature key new content
Expected Outcomes	• Increased awareness • Just-in-time learning
Timing	• As opportunity is identified

Email to Site Stewards and Site Designers with a Learn, Apply, Join Message

Description	• Message to encourage Stewards and Designers to get trained and join the Power Users community
Audience	• Site Stewards and Site Designers
Key Messages	• Learn (get trained!) • Apply (best practices and standards) • Join (the Power Users community)
Expected Outcomes	• More knowledge distributed across the organization • Improved "findability" and search results
Timing	• At initial launch and then periodically thereafter as part of ongoing communications

Content Migration

When converting from using an old system with its functions and operations to a new system with new functions and operations, it's critical that you account for the data. Often, the plan to migrate existing data into the new SharePoint system includes practices such as fork-lifting a file share into SharePoint, for example. Compatibility and other issues, however, can make this a very bad idea. Simply mass-migrating data into a new SharePoint application is not a best practice. We recommend pruning existing data before it is migrated. To do this, it's often best to leverage users who have an existing, vested interest in the new SharePoint application. A user who does not understand how SharePoint can be effective will naturally resist the investment of time needed to prune and migrate the data. Typically, you'll want to choose from one of the following options:

- **Clean and migrate everything**
  One option for data migration is to migrate all the existing data from the old system into SharePoint. All the existing data will then be easily accessed in the new system. However, this can be a time consuming process that requires significant investment of time. The key point here is that you'll want to clean up the data before moving it into SharePoint.
- **Migrate nothing: Index Old content; new content in new system**
  A second option is to leave the old data in the old system (for example, on the existing file share) and start fresh, placing only new content into the new SharePoint system. This is a common approach, since old content is still accessible.
- **Clean and migrate recent content only**
  The third approach to data migration is a kind of hybrid approach: migrate only the last three months of data, for example. This allows users to take advantage of the new system features (for example, things like search, tagging, and social feedback) on existing data.

In short, the key element to all migration strategies is to clean the data before the migration process begins. There is also a fourth option – the one selected at many organizations – "all of the above." In other words, very often, different migration strategies are appropriate for different content types and different owners of content. Similar to training, your content migration strategy is not "one size fits all." The important thing is to think about content migration and include the most appropriate strategy in your adoption plan.

User Support

There are several user support activities to consider when planning your support strategy. Some of these activities include:

- Contact for every portal page
- Community of Practice for Site Owners and "Power Users"
- Help Desk
- End User "Cheat Sheet"
- Tip of the Day
- Custom Help
- Enabling end-user feedback

Page Contact

It's a good idea to make sure there is a contact person clearly identified for every page and site and that users can easily find out who it is. You can use the "out of the box" Contact Details Web Part to display the name of the contact for the page or site. The page contact should be the person who can provide support to users about the specific content of the page. You may also want to showcase a page or site "sponsor" or business owner for each page or site. While the primary contact is effectively the day-to-day content "steward," the business owner is the executive who is ultimately accountable for the page or site.

Community of Practice

Consider getting Site Owners together on a weekly basis for the first few weeks after SharePoint is launched so that they can provide feedback and support each other. Better yet, create a collaborative team site to host a community of practice for all site owners and power users to share and exchange ideas on an ongoing basis. Even though many of the pages are independent, a good idea from one user or group may also be relevant to another. In addition, any major changes to taxonomy or page layout can be reviewed and discussed by the whole group before they are brought to the portal steering committee or governance board for final approval. If there is a local SharePoint User Group in your area, you can also encourage your Power Users to attend.

Help Desk

Make sure that your existing IT Help Desk is prepared to support SharePoint. Help Desk personnel may be assigned special permissions for SharePoint sites that cross the "out of the box" roles of Visitor, Member, and Owner. Help Desk personnel have unique needs. They will likely provide the first tier of support for SharePoint users, but they may also be the least familiar with the SharePoint content itself due to their systems-focused role in the organization. If Help Desk personnel are expected to support Site Owners, they need to have the same type of SharePoint design training that Site Owners are provided, so that they can support users with design privileges. In addition, they need custom training about your specific SharePoint implementation to become thoroughly familiar with the end-user experience for users with Visitor and Member permissions. Help Desk personnel should understand how the site collection is organized, and they should be given a list of common end user queries and issues. It is useful to have the development team "back-up" the Help Desk on site for the first couple weeks after the initial SharePoint launch, and perhaps even provide ongoing Tier 3 support.

Provide a Cheat-Sheet

Place a SharePoint user "cheat-sheet" within a SharePoint site. A simple, handy reference guide can go a long way in encouraging users to familiarize themselves with SharePoint and therefore gain confidence in using the system. There are many sources that can be referenced as the basis for such a guide: the "SharePoint End User Tasks" section in the Appendix of Essential SharePoint 2010[2] is an excellent place to start.

SharePoint Tip-of-the-Day

A great way to remind users of existing capabilities and introduce them to new features is to incorporate a new "tip of the day" on your site. You can leverage content in your "cheat-sheet" or an FAQ database. A Tip-of-the-Day is a great way to disseminate SharePoint knowledge without overwhelming users with a flood of information.

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[2] Jamison, Scott, Hanley, Susan, and Cardarelli, Mauro, *Essential SharePoint 2010: Overview, Governance, and Planning* (Addison-Wesley, 2010).

Configure/Customize SharePoint Help

The SharePoint out-of-box help documentation is good – not many users even realize it's there. Make sure you make users aware of this help option. Or better yet – customize the help to make it company-specific. If users can see the screen shots and help that are specific to your organization, it will be easier for them to use the help system.

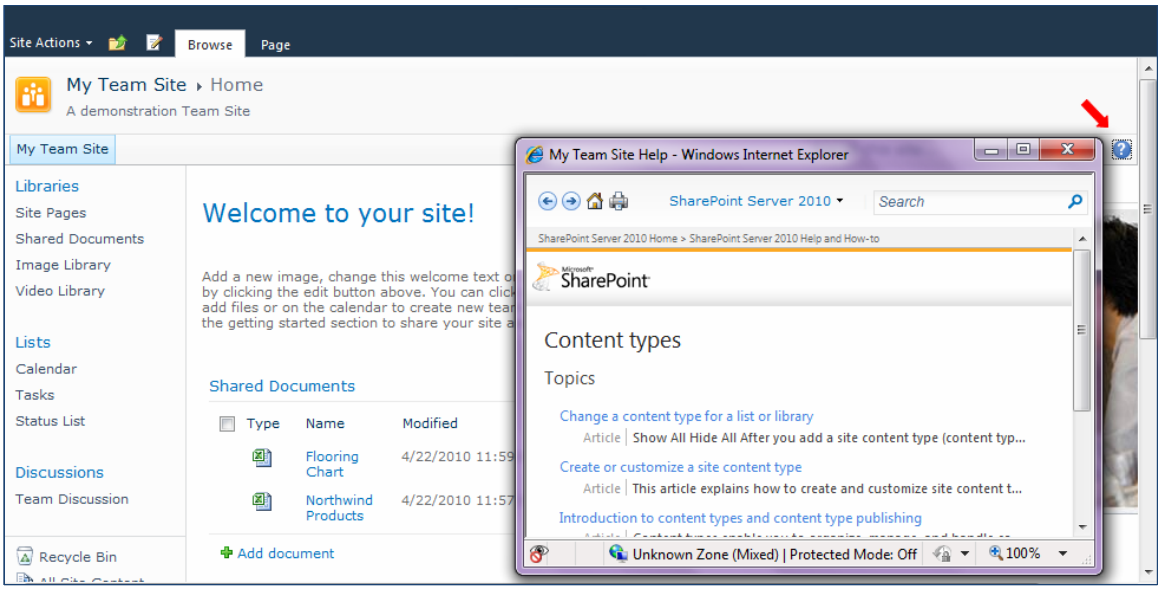

Figure 6: SharePoint's Help Documentation.

End-User Feedback

Finally, be sure to provide mechanisms and processes for incorporating ongoing user feedback so that you can provide adequate support and you can improve the design and usability of your SharePoint environment, content, and functionality. In addition to a contact on every page, you should provide a feedback mechanism on every page. You may also consider periodic user surveys to learn about how people are using the solution and, most importantly, to collect feedback regarding how the solution is adding value to their business processes. These stories are critically important to your overall adoption strategy. Users who are skeptical about trying the new solution may be encouraged to try it when they hear about the successes that their peers are having with the solution.

Incentives and Rewards

The solution that you build using SharePoint should solve or address a business problem that is relevant to your users. Incentives and rewards can be effective tools for getting people to try SharePoint and apply it to their day-to-day work, but at the end of the day, you should not assume that incentives or rewards will continue to drive long term adoption. They are, at best, short term strategies only. But, they can often be effective to jump start your deployment and get people to try it for the first time.

Team-Based Rewards

If you do plan to use incentives or rewards to jump start user adoption, consider team-based rather than individual rewards to encourage sharing. Also, consider recognizing users for both knowledge creation and reuse. It is important to reward not only the originator of an idea or the contributor of a document but also the "re-user." For example, you could run a contest for the most active, collaborative Team Site and reward the members of the site for posting, sharing and re-using each other's assets.

Champion Knowledge-Sharing

Champion knowledge-sharing behavior as well as SharePoint usage to facilitate culture change. Create specific programs and communications messages to focus on "how we work, how we share, and how we integrate." Consider incentives for using SharePoint in ways that add value for other users. Recognition often lies in being perceived as an expert by peers and management. Ensure that the author's name is attached to documents, guidelines, best practices, and presentations he or she creates. This can be exploited with presence recognition technology – users can find an asset and see that the author is online and then either send an instant message or initiate a phone call to make a connection. For example you could create a "Kudos" site and get people to give public recognition and thanks to each other. Another organization has implemented the idea of points and badges that people can earn by helping answer questions, post content and share knowledge.

Celebrate Best Practices

Create recognition for transferring and using best practices. You can do this by celebrating best-practice success stories in existing corporate communications vehicles. Recognize both parties and units involved in the transfer of knowledge. At any given time, someone is both contributing and receiving knowledge. If both sides of the transaction are not rewarded, you will run out of content quickly. Formal rewards may not work in your culture; be careful about using specific rewards for people motivated primarily by a sense of involvement and contribution. Reach out to your Human Recourses department to help develop and document incentives and rewards that are appropriate for your organization and culture. Use the new solution as an opportunity to be creative; try not to get hung up on what has worked in the past. This is new technology with enormous amount of personalization capability. Take advantage of the inherent value of the SharePoint technology to look for new and exciting ways to encourage and reward use.

Must-have Resources

There are a number of resources that Microsoft has made available that help with SharePoint adoption.

The Productivity Hub

Microsoft has developed the Productivity Hub to help support your ongoing end user training efforts. The Hub is a SharePoint 2010 site collection that serves as a learning community and is fully customizable. It provides a central place for your training efforts, and includes training content from Microsoft's core products. Microsoft also provides ongoing and updated content packs.

The Hub uses SharePoint Server's social networking capabilities, including blogs and discussion groups. In addition, it offers the "Coach program," a change management feature to help you train end users to self-help, reducing the burden on your training and IT staff. The Coach program impacts productivity in a collaborative and positive way.

The Productivity Hub is…

Format	Pre-loaded SharePoint site collection optimized for Web 2.0 functionality and easily deployed within SharePoint environment.
Content	Convenient end user productivity training in a variety of formats (documents, videos, podcasts, etc.). Users receive free quarterly updates of content that you will learn about through the Productivity blog.
Blog	The Productivity blog offers tips and tricks for end user productivity. Use it as is, or your training staff can use the posts as their own to help them get started in running an internal blog.
Train the Trainer	Includes an IT/Manager section to aid with deployment of the site collection and guidance to develop the Coach program.
Products	Office 2010 System applications (including SharePoint Server 2010), Windows 7 and Internet Explorer 8.

You can also download additional content packages that expand the training materials you can make available through the Hub. The 2010 version of the Productivity Hub can be found here.

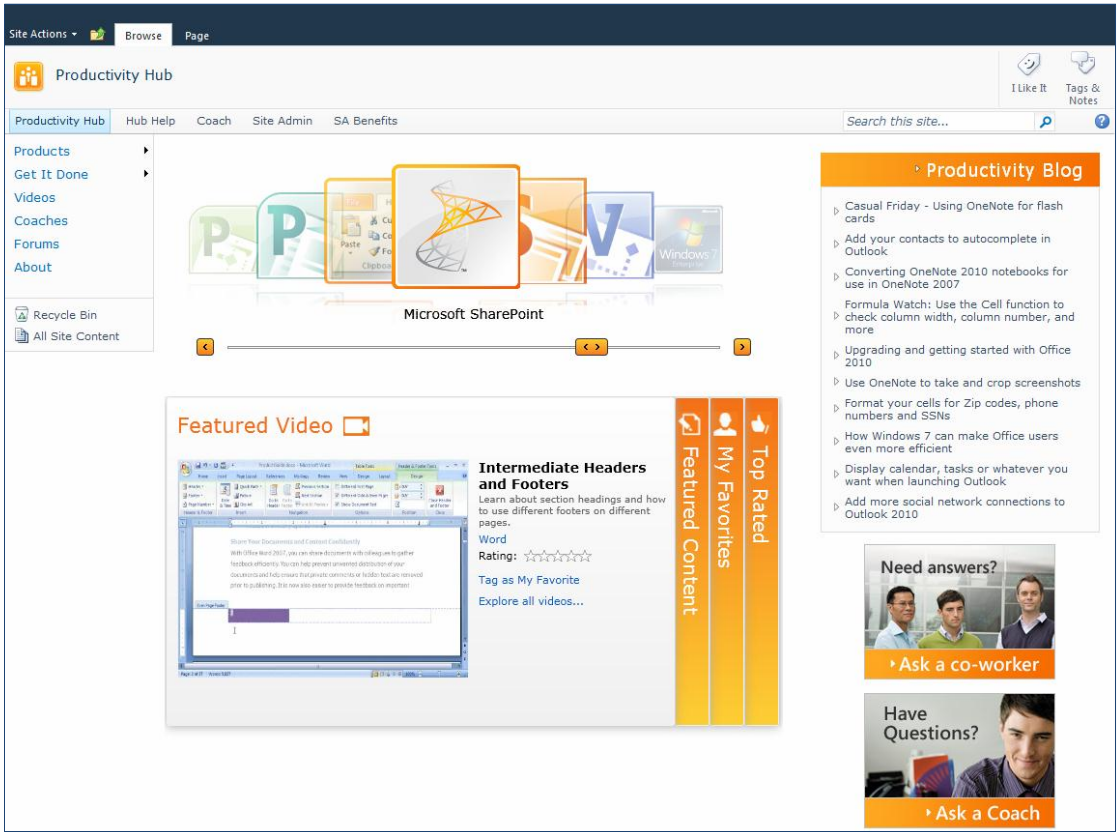

Figure 7: Productivity Hub.

Get the Point Blog

The Get the Point Blog is the blog by the Microsoft SharePoint End-User Content Team. The blog is designed, written, and published by the writers who bring you the SharePoint content on Office Online. We write content for all SharePoint Products and Technologies and encourage contributions from the SharePoint user community. The Get the Point Blog can be found here.

Computer-Based Training

You might have access to free training to users and not even know it. Microsoft Learning offers free online training for SharePoint for companies with an Enterprise agreement. Ask your internal person in charge of your Microsoft relationship to see if you have this benefit. Even if you don't have free access, you can still purchase courses. Microsoft Learning can be found here. In addition, there are free training videos available on Office.com.

SharePoint Buzz Kit

The SharePoint Buzz Kit includes everything you need to run an internal communication campaign for your SharePoint Server launch. It includes a PowerPoint presentation, videos you can use in kiosks or embed in the presentation, training materials, posters, e-mail announcements, guidelines on building community, guidelines on how to use the buzz kit and more. The Sharepoint Buzz Kit can be found here. (Note: the buzz kit was created for SharePoint 2007, but its main themes are still relevant.)

Conclusion

Adoption of new technologies, especially SharePoint, doesn't happen all of a sudden, all at once, or without a plan. Users won't usually rush to embrace a new solution unless it very clearly addresses their overall business goals. In his outstanding book, Enterprise 2.0, Andrew McAfee references a 2006 Harvard Business Review article by Harvard marketing professor John Gourville.[3] Gourville traced the commonly used phrase about building a "better mousetrap" to a quote from Ralph Waldo Emerson: If a man can write a better book, preach a better sermon, or make a better mousetrap, than his neighbor, though he build his house in the woods, the world will make a beaten path to his door." Gourville concluded that this quote was compelling but wrong, citing that there are plenty of examples of products that have offered an advantage over others that they have replaced but haven't actually replaced them. McAfee brought this example to light in his keynote address at the 2009 KM World conference. He asked the members of the audience to raise their hands if they had a TiVo. About a quarter of the room raised their hands. Then he asked people to keep their hands up if they loved their TiVo and couldn't possibly imagine watching TV the "old" way anymore. Not one person lowered their hand. Then he asked, "Why don't we all have a TiVo?"

Gourville's article offers several reasons for why it is particularly difficult to get users to adopt new technologies. The first reason is timing: early adopters give up their "comfort zone" immediately but receive benefits in the future. The second reason is that the benefits of adoption are not guaranteed – the new solution may not work the way it is supposed to. The third reason is that benefits, especially with portal and collaboration solutions, are typically qualitative, which makes them very difficult to describe and compare. This is why collecting user success stories is so important.

The result of Gourville's research is what leads to what he calls the "9X Effect." In simplest terms, this means that essentially a new product has to offer a nine times improvement over the existing solution in order to be immediately or easily adopted. If your solution is not nine times better, then you have to pay close attention to the fact that people inherently value what they already have or what they are used to over solutions or tools that they don't currently use. This doesn't mean that adoption isn't possible – it just emphasizes the critical importance of a well thought out adoption plan.

Remember:

- Adoption won't happen magically. Only by guiding users, demonstrating the usefulness of SharePoint, and using SharePoint 'champions' will full adoption take place.
- Have a plan ahead of time for your SharePoint launch, rollout, communication, and training. Make sure your plan is written down and "socialized."
- Use the great resources out there: there are excellent resources waiting to be used by your organization for use in your SharePoint adoption plan. And many are free!

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[3] Gourville, John T., "Why Consumers Don't Buy: The Psychology of New Product Adoption." Harvard Business School Note #504-056 (Boston: Harvard Business School Publishing, 2004).

McAfee, Andrew, *Enterprise 2.0: New Collaborative Tools for your Organization's Toughest Challenges"* (Harvard Business Press, 2009), 167-171.

About the Authors

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