

Five Steps to Successful Implementation of Microsoft SharePoint in Your Organization

(By Sven Homan and Kristen McAlister)

INTRODUCTION

SharePoint 2007 is a product allowing for companies like yours to easily set up an organizational hub or portal for all things that can be placed on the company Intranet. Most organizations adopt SharePoint for its document, project, calendars, scheduling, and other collaboration management features. It is not however the subject of this paper to delve into the list of all features and benefits or to convince you that SharePoint is right for you; rather the subject of it is to lay out the five tested steps that every company can follow to assure the most successful implementation of SharePoint in its organization once it has already decided this is the right way to go. Following explanation of each step is how we as consultants, at our respective companies, handle that step.

Step 1: Assessment and Planning

Deployment and configuration of the company wide portal, or any other system of this magnitude, must be carefully planned in terms of resources, timing, training, and for short and long term induced changes in employee work habits and business operations procedures.

In this phase the following questions must be answered:

- What will be the benefits of deploying SharePoint, how much would it all cost, and if done, how fast can it happen?
- Which version of SharePoint do we need and what are the pros and cons of each decision when looking over the next 1-10 year time frame.
- Should deployment and management of the infrastructure be in-house or with a specialized hosting vendor? What are the pros and cons of each over the short and long term? How easy it is to change your mind if economics or other decision factors change?
- How fast should the rollout happen in order to lend itself to efficiencies rather than be disruptive to the operations in the short term?
- Should we use any outside resources including professional employee training, what kind, and who can provide it?
- Will there need to be any kind of outside post-deployment technical support, what kind, and who should provide it?

How do we handle this step?

We provide an on-site assessment that includes meeting with the key business and technical stakeholders. We gain an understanding of your business needs and how the

software would need to support the operations of your business unit or company. We discuss the options, benefits and make a customized plan of implementation.

Step 2: Installation and Configuration

Armed with information about the existing infrastructure, projected number of users, storage requirements, and features to be most likely used by the company employees, you can install the software. Whether you need this step or choose a hosted solution, you need to decide on which package to best serve your needs from the variety of packages most hosting companies offer. Configuration is also more intense when deployment is home-based, but you should not dismiss home-based deployment on this factor alone. Home-based deployment offers potentially tighter security, more integration with other IT assets and company data, and assured privacy of all information. On the other hand, one must configure emailing as part of SharePoint operation, setup backup plans for all data, import and manage end-users, and provide regular maintenance of the system, all of which are provided automatically if SharePoint is hosted outside.

How do we handle this step?

We perform all steps on-site hand-in-hand with your IT personnel. In the case of a hosted solution, we recommend an appropriate package and provide guidance and instructions on how to manage it. In the case of home-based deployment, we make sure that integration goes smoothly with minimal disruption and that the new asset works well with the previously existing.

Step 3: Customization and Development

Having an installed SharePoint is really just the beginning. SharePoint, when first deployed, does not come with any pages or sites specific to each department or any other sought after solution in your company. It does come with a range of predesigned templates which enable you to create the site pages, and many other solutions. In addition to configuring your departmental or activity-based features, such as employee benefits, project management or help desk mini applications, you may also want to develop some custom modules for your operations where there are no predesigned templates. SharePoint offers many options for customizing the environment and developing new solutions. They range from simple rearrangement of elements on the page to designing custom security for your documents to programming entire new applications that are not available elsewhere. SharePoint can be integrated with outside programs and databases and coded to provide entirely new features, appearance, and behaviors.

How do we handle this step?

Based on our initial meetings, we collaborate on a proposal of the SharePoint solutions to your business needs and opportunities. The agreed upon outcomes are then implemented through customization and other development tasks.

Step 4: Employee Training

Training of end users and site or system administrators is arguably the most important step in the entire implementation process. Gains from installation, configuration, and customization can only be realized if employees know how to best use the end product. The important thing to know is who provides adequate and quality training, how much should you spend on it, and who from your company should attend. There are at least two distinct parts to any training – a generic part for all SharePoint users, which must cover common SharePoint instructions for use and a company specific training part based on the results of your SharePoint customization.

How do we handle this step?

We believe that training – ours or from another provider - is critically important to success of the SharePoint deployment project. Our training package is designed to provide condensed and essential training for even the most demanding users. It is unique in a sense that as implementers of your installation, configuration, and customization, we are in a unique position to more easily design and provide both parts of your SharePoint training, namely the standard and the custom. First part is the generic end-user and site administrator training, which we do ourselves or with one of our corporate training partners. Second part is company specific components designed and created for your customized deployment. For both parts we provide the training materials and train your employees to gain the most value out of it using as many live business cases as possible. We strongly discourage you to use training or lack of it as an area to save money, since it tends to dramatically decrease the expected returns on your SharePoint investment. Your employees can be only as productive on the new platform as they know how to use it and be creative in bringing the best out of it.

Step 5: Technical Support and Monitoring

Every software installation of this magnitude, which includes multiple end users, involves or integrates with several company servers. These must address multiple security concerns, requires occasional checkups provided by professionals and possibly have a need to directly support the end users. Support should be a place where employees and system administrators can call for troubleshooting, upgrades, and order changes to the installation and customized components of SharePoint. Support should also include having professional do regular checkups as to the health of the deployment. Health can be measured in adequate storage, acceptable system response times, errors not happening, and in employees properly using each available component. It is common to not feel the need for checkups and technical support given a successful deployment. We do not recommend this since it is wishful thinking that nothing will ever go wrong no matter how small or successful the deployment is. Systems evolve and mistakes tend to accumulate. At a minimum, the security of any installation should be audited, and if necessary, reconfigured at regular intervals. Your employees are trained as users and knowledge workers, and not as software designers or network administrators. Whether you operate in a complex IT environment or in a small company outsourcing your IT

needs, it is always most effective to have the IT professionals managing the infrastructure thus allowing your employees to focus on the jobs they were hired and trained for.

How do we handle this step?

We offer several packages to provide adequate technical support. Packages are based on a number of pre-purchased incidents per month or you can pre-purchase a number of incidents with an assigned duration. Each incident is a non-time restricted effort on our part to resolve your problem – meaning, we do not measure and charge the time it takes to solve your problem, we simply fix it as part of a single incident.

CONCLUSION

Having a solid and well researched plan coupled with the proven steps as described in this paper are essential for lasting and efficient installation of your SharePoint environment. If you do as described, your employees will be happy and more productive with the new tools and environment. With increased productivity and morale, business owners can then focus on additional business opportunities and the growth they provide for the future.

AUTHORS

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