SharePoint Project Management: The Key to Successful User Adoption

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Abstract

SharePoint is a powerful tool that is quickly becoming the standard collaboration technology in most businesses around the world. When implemented well, it delivers great capability, functionality and power to its end users. When implemented poorly, however, it can result in the greatest possible issue: that the end users won't adopt the technology into the business.

The key is to utilize a formal project management approach when implementing SharePoint. This ensures that the end user—who is the true customer of the SharePoint system—is involved in the process from start to finish. This involvement gives the user a direct investment in SharePoint, and allows their requirements to be accurately and appropriately included in the design of the system. When this occurs, it is guaranteed that the system is built around the current needs of the business, thereby securing its value to the customer and company. The customers will also have a much better understanding of what SharePoint is and what it is intended to deliver to them when they are involved from the start. This understanding will foster their support of the project and the technology, thus ensuring their successful adoption of SharePoint into their daily business operations. This adoption is the most critical success factor in the overall SharePoint implementation.

About the Author

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The Value of Implementing of SharePoint

Microsoft SharePoint is a premier web application platform used to provide and manage intranets, extranets, websites, document management, file management, collaboration spaces, social networking tools, enterprise search, business intelligence, process/information integration, and third-party solutions.

Figure 1: The Capabilities of SharePoint *(Image courtesy of Microsoft Corporation)*

Increasingly more companies are adopting SharePoint because it offers a suite of functionality within a single product that allows its users to collaborate across functional, logistical and physical areas. The flip side of SharePoint's powerful capability comes with a price, however: it is still an evolving technology, and a complex one at that. The underestimation of this complexity has caused many unsuccessful SharePoint implementations as evidenced through significant cost and schedule overruns and worst of all, a lack of user support and adoption.

The Typical Components of a SharePoint Implementation

The most important point to keep in mind when considering a SharePoint implementation is that there are two large components involved: the implementation of the system and the

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(Image courtesy of Microsoft Corporation)

management of the system after rollout. Both of these are huge, complex and resource intensive endeavors that need to be evaluated thoroughly before a decision to move forward is made.

The implementation of SharePoint is in itself incredibly complex and requires adequate resources in terms of expertise, infrastructure and funding. If the support and resources are not available at the start of the project, this becomes a major risk during implementation and management. Once SharePoint is implemented, the ongoing management and maintenance is also quite significant, requiring sufficient and ongoing resources as user adoption becomes the key risk.

SharePoint is not a simple technology to implement, manage or support. It requires a higher level of support from the Help Desk, more frequent maintenance from various areas within IT, and a longer period of time for user adoption. These factors should not be underestimated, and need to be planned into the strategy of the rollout. As importantly, expectations around these areas need to be communicated and understood by senior management, IT management, IT staff and the end users.

A SharePoint implementation has several elements to it in terms of infrastructure, content, policy and process. Below are the typical elements involved in the rollout of SharePoint 2010.

Server and farm environment planning	Site and solution planning
➢ System requirements ➢ Services architecture ➢ Logical architecture ➢ Authentication ➢ Security ➢ Business continuity and disaster recovery ➢ Performance management ➢ Capacity planning and management ➢ Virtualization opportunities	➢ Site architecture ➢ Fundamental site features ➢ Security for sites and content ➢ Governance ➢ Enterprise content management ➢ Web content management ➢ Managed metadata ➢ Business intelligence ➢ Business data and processes ➢ Social computing and collaboration ➢ Quota management

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Within each of these elements is a comprehensive set of requirements and considerations. The approach for each area should be thoroughly evaluated, discussed and planned out. The anticipated timeframe for each component should be reasonable and realistic, and all decisions should be strategically focused and well documented.

The Most Common Issues during Implementation

The issues that most often arise during and after the rollout of SharePoint are directly caused by the following factors:

- Lack of a clear vision and strategy for SharePoint on the part of senior management and/or IT management
- Inadequate support from senior management
- Insufficient resources during and after implementation
- Unrealistic and unreasonable timeframes
- Insufficient involvement, training, documentation and support for end users

A SharePoint implementation needs to start with a solid vision of how it will integrate with, support and contribute to the company. This vision needs to be strategic in focus, and needs to be developed at the levels of senior and IT management. Senior management then needs to make sure that IT management will have access to the appropriate resources—expertise, infrastructure, and funding—to move this vision forward. If this vision, support and commitment are not secured at the very start, the SharePoint implementation should not move forward because the organization will be unable to support it.

SharePoint expertise will eventually be developed in-house, but at the start of the implementation the best practice is to outsource for the required expertise. The three main technical roles that will be needed are a SharePoint architect, administrator and developer. A SharePoint Project Manager is also highly recommended and will be discussed in detail later.

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The timeframe for the implementation also needs to be comprehensive and realistic when viewed against IT's other priorities, projects and daily operations. Getting things right the first time works much better in a SharePoint implementation than hurrying through. SharePoint is not terribly forgiving when configured incorrectly, so a reasonable timeframe for each component is critical.

When there is insufficient time allotted for a SharePoint implementation, the temptation is to cut corners. Unfortunately, one of the corners that is frequently cut is around documentation, training and customer involvement. This is a serious mistake because it directly damages the chances of effective user adoption, which is absolutely key to any successful SharePoint project.

The Importance of User Adoption

The failure of users to adopt SharePoint once it has been rolled out is the greatest and most expensive consequence of a failed or poorly implemented SharePoint project. When users are not involved at the start of the project, they never gain an accurate understanding of what SharePoint is or what it is supposed to do for them. As a result, they either believe it will not be useful or they think it will solve all of their business problems. Neither is true, of course, but not having the customers understand, support and ultimately adopt an enterprise-wide business tool is a huge issue. It sets IT back in terms of the time and effort they will now need to spend working with their end users to educate, involve, and influence them to adopt SharePoint (which they should have done at the start of the implementation). It also weakens IT's credibility as having any true interest in connecting their technology with the business problems of the end users.

The greatest and most expensive issue in a SharePoint implementation is the failure for users to adopt SharePoint once it has been rolled out.

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Some of the issues that end users have with SharePoint once it has been rolled out are:

- Users are supposed to understand what SharePoint is and what it can do. Unfortunately, half of the IT team probably doesn't even fully understand what SharePoint is. Involvement, education and collaboration prior to rollout is extremely important in gaining customer support.

- Users are expected to learn it quickly. SharePoint is not that intuitive or user friendly, and can actually be quite quirky. Users left on their own to figure out how to use it become increasingly and understandably frustrated when they cannot.

- Users don't feel they have time to learn a new system. Adopting a new technology takes time and effort, and users often feel they have more important work that needs to get done. This is particularly true when the user feels the technology is being forced on them by IT.

- Users feel that once delivered, SharePoint does not offer them what IT promised it would. This could be the result of IT not knowing in advance exactly what they would be able to offer, or it could be inaccurate expectations on the part of the user. Either way, it is indicative of an unnecessary communication problem between IT and the user.

IT needs to be sure to involve the user at the start of the project, keep them engaged throughout, then provide them with the appropriate training and documentation just prior to rollout. They then need to continue to offer training and documentation until the users have fully adopted the SharePoint system into their daily work lives. If this adoption is not achieved, then it was not a successful project.

Utilizing Project Management to Ensure User Adoption

In reality, the core issue is simply one of good project management because the primary focus of effective project management is on the *planning* of a project. The previously mentioned issues could easily be prevented through solid planning. Since the whole purpose of project management is to ensure that the end deliverables match the original customer requirements, planning needs to involve the end users, right from the start. And it needs to

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continue to involve the end users--in an iterative manner--throughout the entire project, not just when the project is delivered.

Hiring a SharePoint Project Manager is the key to making this happen. The purpose of the Project Manager is basically to do everything that IT doesn't have time to do and doesn't want to deal with in the first place, primarily *users*. Interfacing with users, vendors and senior management is distracting to IT as they are necessarily consumed with the technology piece of the implementation. Other distractions that the Project Manager takes care of is making sure there is a clear vision, strategy and path for SharePoint, defining the key success factors for the project, managing the public relations and marketing of the project, resolving issues and removing obstacles, and managing training. There are several other benefits that the Project Manager role delivers, but these are the most important advantages to the IT staff.

While SharePoint Project Managers are not yet the standard on SharePoint implementations, they are sure to become an important role on the SharePoint project team as the gap between IT and the end users continues to cause problems during SharePoint implementations. Business analysts are often brought in to help bridge this gap, but business analysis alone is not enough. Business analysts can make sure that the user requirements are fully gathered and documented, but it is the Project Manager who will ensure that these requirements are incorporated into the actual *design* of the SharePoint system, from the start. The Project Manager will first help the users understand what SharePoint is and what it can realistically do for them in their jobs, and more importantly, what it can't do. Then the Project Manager will involve the users where necessary and keep them engaged throughout. It is the higher level role of the Project Manager that helps prevent the gap between IT and the users in the first place.

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Three of the most valuable contributions a Project Manager makes to a project are:

- ☑ **A non-biased, whole picture view of the project.** The role of the Project Manager is to take a big picture look at the entire project with all of its components, and comprehensively guide the IT team and its users through a well-planned process. The Project Manager is the only truly non-biased individual involved in the project, and their only agenda to make certain that the rollout is as successful as possible and delivers exactly what was intended for the customer of the project—the end users.

- ☑ **A methodical approach for the lifecycle of the project.** Rolling out a complex new system requires comprehensive planning, communication, collaboration, risk/issue management, testing, training and post-implementation processes. There is an order and chronology to these significant elements that must be followed in order to ensure the project's success. The Project Manager is the only one capable and available to manage this process, so IT can focus on what they do best: technology.

- ☑ **A liaison between IT and the end users.** IT has enough to do without worrying about the end users, yet they are IT's customers. Many IT folks are not as good with customer relations as they are with technology, so the Project Manager can bridge this gap and ensure that customer needs are being met by IT's efforts.

So what are some best practices for SharePoint implementation to ensure successful user adoption? When reviewing the best practices that follow, many IT folks will think "there is no time for that," or "that would take way too long," or "we can always do that later." Not true. Best practices are almost always the direct result of *lessons learned*, and there are very good reasons why they exist, not only for the benefits they provide but more importantly, for the issues they prevent. The best practices below are not a "nice to have"; they are all about getting it right the first time to save time, money and credibility.

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Best Practices for User Adoption

Here are the top 12 best practices for effective user adoption, in chronological order:

1. **Hire a Project Manager at the start to facilitate the SharePoint project.**
   The role of the Project Manager is to facilitate the overall step-by-step process through every phase of the project. Their only job is to make sure that the effort expended is no more or no less than the actual effort required to deliver the project—within scope, budget and timeframe—to the customer. This solitary focus ensures efficiency and a streamlined approach between effort and outcome. Most importantly, the Project Manager is responsible for ensuring that each of these best practices is implemented.

2. **Engage management from the start.**
   Management support, at all levels of the organization, is critical for a successful SharePoint implementation. Ideally there should also be an executive "champion" who acts as principal sponsor of the project. This role ensures that management support is consistent from start to finish.

3. **Have a well-planned, phase-by-phase strategy prior to implementation.**
   First decide on the functionality to be delivered, out of the box vs. customizations. Then decide which departments and users this functionality will be rolled out to. Phase the project into Phase 1, Phase 2, etc. if resources are not readily available to implement all of the features right away.

4. **Secure support from within.**
   Just because SharePoint is being implemented and delivered by IT, that doesn't mean all of IT is on board. In fact, there are often many IT folks who are not enthusiastic about having to learn yet another system, with all the typical problems a new system brings. So incorporate some rewards: send staff to all of the Sharepoint training they will need, send them to an occasional SharePoint conference, and turn it into an opportunity for professional development in a valuable area of technology.

5. **IT should be the first customer on SharePoint.**
   All IT business processes and documentation should be transitioned to Sharepoint first, including the Help Desk. IT needs to use their own product comprehensively before rolling it out to other departments. If they can't support their own function and staff on SharePoint, they will never be able to support the rest of the company.

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6. **Do not expect the "If we build it, they will come" mentality to apply.**
   This is a common mentality in IT, and it simply isn't true in most cases. End users need to be shown a reason why they should be open to try something new. Get customers involved and invested early on by soliciting their feedback at various points throughout the project. Then be sure to actually apply their feedback, wherever appropriate.

7. **Identify and implement the most valuable SharePoint features first.**
   Starting the implementation with the delivery of immediate benefits to the end users is a surefire way to gain and maintain their buy in going forward. Some possibilities that SharePoint does better than most other options are: a robust intranet, people search, on-line forms, surveys, and document management. These features come standard with SharePoint and require minimal work from IT.

8. **Manage expectations.**
   The first phase of the implementation should involve implementing any out-of-the-box functionality first, and utilizing SharePoint to its fullest in its simplest form. Once its basic capability is thoroughly understood and used by everyone, then Phase 2 or 3 can involve customizing or further developing any functionality that is a direct benefit to the company.

9. **Design the environment and workflow to support existing business processes.**
   This begins with the requirements gathering from the end users. As the environment is built and workflow developed, the end users should be involved to review and test the functionality to ensure it matches their current business processes. There should be a process in place for users to request changes so they can be made in a timely manner.

10. **Delegate content owners for each site.**
    One of the cardinal rules of an effective website, intranet or extranet is current, relevant and accessible data: make sure someone is assigned to oversee and manage the content in each SharePoint site.

11. **Adopt a "train-the-trainer" strategy, including the selection of a power user in each department.** This is embeds a level of user support directly with the users. When end users are trained by one of their coworkers, they tend to have much more

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confidence in the product since they know their coworker understands their business and will relate the technology to the business, not the other way around.

12. **Be prepared to provide several levels of training and support.**
    a. Provide users with comprehensive, customized, hands on training so they can learn how to use the system in the way they will actually be using it. Some IT departments make the mistake of providing generic SharePoint training to their users rather than customized training. The problem with this is that when the users then try to work within their own SharePoint environment, everything looks different (because it is!). This is incredibly frustrating to users who just spent their time supposedly learning the new system.

    b. Document and distribute clear, step-by-step instructions. These instructions should include all business processes and how they are executed within SharePoint. All direct users should be provided with a copy, and they should also be available online within SharePoint.

    c. Training and documentation should be available, accurate and current at all times. When a change is made to the SharePoint system, it should be documented and communicated to all users. There will be a lot of necessary hand-holding in the beginning months following implementation, so support needs to be available through sufficient training, documentation, online help, by phone and in person.

Conclusion

Project management is the key to a successful SharePoint implementation because it makes sure that critical components are carried out in a methodical and comprehensive manner, and that the bridge between IT and the customers is built on solid and iterative communication. With the Project Manager facilitating the work that needs to be done and resolving any issues that arise during the project, the project team--the architect, developer, administrator, subject matter experts, functional managers and most importantly, the customers—can be freed up to focus on their own respective work and roles team members.

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Project Manager's role is designed to make everyone else's jobs easier by managing the work required, communicating pertinent information to the stakeholders, resolving issues as they arise, and ensuring that the original requirements of the project are being addressed and fulfilled by the end deliverables of the project. The Project Manager, therefore, is the only one overseeing the entire project with no other agenda but to make sure it is on track to meet the customers' needs and prevent any rework or unnecessary work for IT.

Engaging a SharePoint Project Manager to facilitate a SharePoint implementation ensures that effort, time and resources are managed efficiently, while also managing the critical element of communication, since IT and end users often seem to be speaking different languages. These key elements of planning, resource management and communication guarantee successful user adoption because they fulfill everyone's investment—IT, management, the project team, the customers--by making sure that their work is rewarded with an end result that directly satisfies the customer's requirements and expectations.

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