Proven Techniques for Speeding SharePoint Adoption

Written By:

Chris McNulty
General Manager, SharePoint Business Unit
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Check the search logs...

Monitor My Site usage...

Check content growth trends...

Repeat rollout training...

Re-evaluate your roadmap...

About Quest AttachThis

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Abstract

IT managers are keenly aware of the investment their organizations have made in SharePoint and the many advantages it offers, including improvements in content collaboration, access to business intelligence, data security, compliance and auditing. But SharePoint adoption is lagging because users simply don’t care about all of these advantages.

Fortunately, there are practices that lead to successful SharePoint adoption. Adopting those practices, and avoiding techniques that only turn users off, is a proven path to SharePoint success.
Introduction

SharePoint Adoption versus Mere Usage

Let’s get to the point. SharePoint 2010 is a powerful platform for enterprise users to collaborate on documents and projects, gain valuable business insight and access business-critical information. SharePoint 2013 improves upon these capabilities with its new social capabilities, enabling users to keep up to date on the people, sites, documents and topics they are following. All of this bodes well for SharePoint adoption; yet lagging SharePoint adoption is still one of the biggest issues facing organizations that have invested in this platform.

Some organizations are wildly successful in using most of SharePoint’s features. Others struggle to even get SharePoint’s most basic elements off the shelf and into common practice. The question is, why?

First, the real goal of any SharePoint system should not be mere “adoption.” At conferences I’ve heard more than a few users explain their enterprise adoption strategy is really a mandate: “You must use SharePoint!”

SharePoint “use” is not the same as SharePoint “adoption.” You can force SharePoint use by making the portal homepage the default for all user browsers, and then reinforce your requirement with user reminders, activity inspections, and so on. Adoption, on the other hand, connotes user choice. Browser lock-ins, nagging emails and employee performance objectives are, well, the opposite of choice. You may get usage. But you’re not getting adoption.

What really matters is user satisfaction – the ongoing use and efficacy of SharePoint to support business goals. SharePoint 2010 can be compared to a functional “fire hose,” having grown from a simple tool for team documents and dashboards in 2001, to the rich multifunctional environment of SharePoint 2010. (BI! Workflow! Social computing! Data integration! Etc.) And if you can’t push on a rope, as they say, you really can’t push a fire hose – users need to pull it in.

Adoption Stakeholders

Another way to understand the challenge of adoption is to recognize that there are two broad classes of adoption stakeholders:

- **Technical stakeholders** seek to justify and sustain their investment of time and resources in the platform. For them, adoption is a “push” – put solutions out there and look for end users to pick them up.

- **Business stakeholders** have a different perspective. They seek results from the system, and hope that they can pull enough value from the technology to attract other users and sustain a network effect of productivity.

Unfortunately, in most organizations, SharePoint rollouts are still treated principally as IT projects. The challenges in user behavior, though, are seldom technical. The patterns and practices for designing, deploying and maintaining a well-ordered SharePoint farm have been around for some time; the challenge comes in the continuum of business usage. Remember, SharePoint is business software. It needs to accept and embrace its business purposes, above achieving technical excellence. It’s not that IT isn’t interested in usage. They’ve usually made the lion’s share of investment of time and resources in the platform. But capturing hearts and minds is far more subtle. It requires empathy, listening, understanding – in short, psychology.
That's tough. Even the most recent APIs for SharePoint 2013 show us that PowerShell, for example, lacks the command:

\texttt{SharePoint-MakeHappy -mode AllUsers}

**Enablers and Roadblocks to Adoption**

There are many enablers to successful SharePoint adoption. Sustained, reliable uptimes are essential to capturing user confidence in the platform. Happy users with minimal complaints about support are another hallmark of well adopted systems. Another fantastic indicator of a culture that sustains adoption is measurable return on investment. If business users can point to quantitative measures of success, it helps spread the word and win over mindshare among those not yet using SharePoint. Finally, speed to market is essential: if it takes too long to get a new project or process implemented on SharePoint, users start to lose interest and look for alternatives.

There are also known roadblocks to adoption. A poorly planned architecture, with bad interface design and too many irrelevant documents, obscures all the valuable content users need from the platform. Bad governance – either too much or too little – can either drive users away or make usage patterns so chaotic that usage becomes difficult. Ironically, many users also cite the speed-to-market of SharePoint solutions as a roadblock as well. It can lead to a boil-the-ocean climate where SharePoint gets positioned as the answer to all business needs, and the pace of change outstrips users’ ability to learn and adapt. Finally, disconnects between IT and the business can lead to the “Field of Dreams” problem. “If you build it, they will come” works only if you stop to ask what “they” need. Uneducated guesses about user requirements turn SharePoint rollouts into social experiments instead of nimble business tools.

**About this Document**

This white paper explores specific practices that lead to successful SharePoint adoption – and practices that will only turn users off and squander your investment.
Good Adoption Practices

Today, we'll walk through some guidance from the consulting field. First, let's start with the do's: practices honed through field work and conference surveys that will encourage SharePoint adoption, not merely force SharePoint usage.

Provide applications – If you buy it, they will come.

Use what’s already out there. The SharePoint ecosystem is full of prebuilt solutions, most of which are free or low-cost. For example, Microsoft's open source site, www.codeplex.com, is loaded with prebuilt solutions such as security reporting and Silverlight rich media controls. In addition, with SharePoint 2007, Microsoft provided 40 free application templates for common needs like IT Help Desk and event planning. Although Microsoft didn’t rework these templates for 2010, the community has developed 2010-based version of the so-called “Fab 40”; you can download them from http://www.techsolutions.net/SharePointSolutions.aspx

In addition, Quest Software has released a free community forum web part at www.quest.com, and Bamboo Solutions also offers a free time and weather web part at www.bamboosolutions.com. These tools help you get real web tools out to your users quickly. And there’s no shortage of product releases from a broad range of ISVs to enhance SharePoint with prebuilt components.

Fun and Functional Applications

Some successful applications for SharePoint intranets have included:

- **Lunch application** – The way to the heart may be through the stomach. On many successful intranets, food is critical. (Not just during software development!) For example, one of my clients provides free lunch daily. When they moved to a SharePoint intranet, we set up an application to let all staff preorder and customize any sandwich requests. Staff have an emotional bond to SharePoint! In fact, the app is considered so important that it’s become an explicit part of their internal SLA. Other clients have used similar systems – some with InfoPath, some with custom forms, some with standard lists – to let people order breakfast, lunch, or catering from their desks or mobile devices.

- **Birthday list** – Another example of fun, unique and essential information that bonds users with the site.

- **Today @ ACME** – This was a custom home page web part the summarized all the meeting room calendars for a single day, and it was also posted to a “clean web page” for ease of bookmarking on tablets and smartphones. This created a “cool factor” of the SharePoint intranet that spurred usage beyond expectations.

- **Dynamic content on home page** – Offering a fresh cycle of new information on the home page is at least as important as clean, attractive design.

Assessment Tools

- **Surveys** – SharePoint has its own survey tool. Use it to measure success with users and determine future needs.
Help Desk – End-user-facing support staff are the first line eyes and ears of IT. They are a great source of information about how a new platform is being received, and they can also be powerful advocates for – or against – change, since they work with multiple user populations.

SharePoint maturity monitoring – Sadie van Buren has published a guide to a standard SharePoint Maturity model at www.spmaturity.com. Measuring your organizational progress year over year helps spotlight areas that need relatively more attention.

Training

Lunch and Learn – This widely used technique to attract people to events designed to foster usage-oriented learning.

Formal training – Multiple opinions exist. Internal training is seen as being more tailored to particular corporate needs; external trainers are often more available and easier to schedule. In addition, it helps to distinguish between training on the platform itself and training on customized solutions. Consultants or internal development teams are the only ones who can explain and teach users about how to use their customized solutions. But it’s inefficient to expect them to also train users about general SharePoint use; training specialists almost always can deliver standardized training on how to use SharePoint more efficiently than consultants or developers.

Marketing

Branding or naming – When a company launches or re-launches a SharePoint-based project, it helps to brand the project with the name of the site (e.g., “I’m using ‘BaseCamp’” instead of “I’m using “SharePoint”).

Marketing & segmentation – It’s important to understand that the adoption message needs to be distinguished not only for different groups of business users (such as power users versus casual users) but also for different IT constituents (developers versus server teams versus analysts and PMs). For example, .NET developers are likely to have different needs and questions about moving to SharePoint than Java developers will.

Practice what you preach.

Set a good example! If you want an effective intranet, use a new intranet to run the project, and teach your business stakeholders how to use it to communicate. And be discerning in your use of newer Web paradigms (Facebook, etc.) to engage that conversation. Why not use a vanilla SharePoint 2010 Communities site to encourage more collaborative approaches, instead of big meetings and emails?

Move quickly with rapid prototypes and sustained momentum. SharePoint lends itself to quick iterations, so make sure you plan frequent small deliverables and reviews instead of waiting until everything’s cooked. Think multi-course meals!

Here are some additional tips for success:

Take a departmental approach – Build success at a lower level first before tackling enterprise-wide adoption. The first department is almost always IT – it’s a friendly pilot, and unlikely to go awry. However, the most important group to get right is the second department, where not all the natives are friendly and first
impressions of SharePoint are likely to spread through the firm. Choose that second phase group wisely – they should be influential but scaled so their goals are achievable in reasonable timeframes.

- **Establish a steering committee – and make it cross-functional** – It helps when the project is accountable to a frequently meeting team of empowered business stakeholders drawn from multiple departments, not just IT and HR.

- **Move fast** – Quick and early successes count more than long, late successes.

**Provide support.**

Users need to know they can get help if they need it. Some suggestions include:

- **SharePoint -> SharePoint** – Use a SharePoint site itself to supply support to users.

- **Support teams** – Make sure Help Desks and customization teams are available and trained in advance to minimize the risk of failing to meet rising expectations.

- **Self-service support and communities** – Some companies report tremendous success using discussions, blogs, and wikis to help users help each other.

- **Team leaders (decentralized support)** – Another approach is to decentralize support to power users or team captains in each logical group of users.

- **Tech sheets** – Quick, one-page tip sheets or FAQs can be distributed to users and help desks via email, web sites, print distribution or knowledge bases.

**Hold lunch events.**

Figure out an effective marketing and launch plan. The right approach depends on your culture – it may be a series of “lunch and learn” meetings or a “launch party.” It could be a site scavenger hunt, or a branded coffee cup or t-shirt. It’s important to understand that to launch the intranet site, you need more than just an email announcement.

Many users schedule a “big event” (usually a breakfast event in the morning, sometimes a lunch, rarely an evening happy hour) the day the site “launches.” In conjunction, these events often offer:

- Training
- Contests and prizes, often with a scavenger hunt
- Public awards
- Giveaways – branded coffee cups, mouse pads or wallet cards with tips and helpful information

**Consider incentives and mandates.**

As we’ve discussed, the goal should be SharePoint adoption and not merely SharePoint usage; therefore, incentives and mandates cannot form the whole of your SharePoint user strategy. However, if the following techniques are employed with the other adoption practices described above, they will serve you well:
• **SLAs** – Some companies offer internal discounts or higher service levels for divisions that move to SharePoint away from more costly legacy technology.

• **Home page** – If the home page is enough of a gateway to needed information, some enterprises lock in the SharePoint intranet as their home page. But remember, performance and site design can become more critical if you’re forcing users to the site.

• **Mandate** – In some companies, adoption is as simple as establishing corporate policy or tying individual compensation or reviews to usage.

• **Viral communications and social communities** – Hard to plan, but very effective if you can use them, especially if SharePoint-based.

**Use a range of techniques to reach all users.**

Remember that your user population is more diverse than you may have expected. Different generations adopt technology differently. There are varying comfort levels with web technology (corporate sites vs. social networking) and platforms (PC or laptop or smartphone). Also, remember that global audiences can also be distinguished not only by different preferences for platforms or tools, but even bandwidth and site performance expectations.

Don’t expect a single adoption technique to work equally well with everyone. In the 1960s, Douglas Macgregor at the MIT Sloan School characterized individual behavior into Theory Y users and Theory X users. Theory Y users are self-directed and are influenced most effectively by tools like incentives, SLAs, and peer influence. On the other hand, Theory X users are externally motivated and respond well to mandates and home page lock-ins. Applying this to SharePoint adoption, Theory Y users like to believe they have a clear choice between a legacy platform and SharePoint, and select SharePoint by individual choice. Theory X users may need to have their old intranet shut down before they move to SharePoint.

You have both personality types in your organization. The proper mix of techniques will account for the blend of these in your user population.
Bad Adoption Practices

Surprise – there’s also a lot you can do to doom your SharePoint intranet project! We can’t fairly call these ”worst” practices, but here are some bad things to avoid. (For the record, failure rates cited below are completely subjective.)

Run SharePoint as an IT project without business engagement.

The “business” hates being told what to do. Building a SharePoint site that presumnes to guess at the real needs is great way to get an abandoned site. “We never asked for it, so I don't see why we should use it just because IT says so” is usually the end result.

Likelihood of project death: 90-100%.

Migrate legacy file shares as-is.

This is one of my favorites. Some senior person complains they can never find anything on the "H drive." Since SharePoint offers a searchable web interface, it has to be better, right? Sure – except if you just dump all the source content into SharePoint without reworking it, all you get is a SharePoint site with top-level folders called bobtest, newtest, newtest 2, and sales1997. Same problem, in a new, shiny package.

Likelihood of project death: 50%.

Deploy hundreds of content types.

Just because you can have lots of content types doesn’t mean you should. Without proper training, you will only confuse people. SharePoint is powerful and often complex. Entering at the pinnacle of complexity management is a surefire way to alienate early adopters. We’ve seen this multiple times, and the result is almost always the same.

Likelihood of project death: 75% (until someone comes in to clean up the complexity)

Do no marketing, training or launch events.

This one is pretty simple – how do you define success? If success equals a well-used, highly-adopted site, then this practice virtually guarantees failure. Simply sending around an email announcing your new site doesn’t cut it. People learn differently, and many folks need multiple “touches” before they feel comfortable with a new technology.

Likelihood of project death: 75%

Keep the home page out-of-box, unbranded and static.

This one is debatable. If users have never seen SharePoint before, things will still look new to their eyes, so it may not be a showstopper. It tends to be more of an issue when there is internal “competition” among different solutions to your intranet needs. Also, initial projects may be constrained by experience and/or budget, so sometimes it’s a necessary tradeoff. However, if nothing ever changes on the home page, it’s hard to establish it as a useful destination.

Likelihood of project death: <25%
Assume that search will solve all data access questions.
This one seldom kills the project outright. But “I can’t find anything” is one of the most common intranet complaints. Keeping pages clean and free of navigation signposts, while expecting users to know what search terms will reveal recent, relevant information, is asking way too much. Most of the time, users don’t know what they’re looking for.

Likelihood of project death: <25%, but can grow over time.

Establish too much, or too little, governance.
Sometimes multiple users establish multiple sites for same pools of data. As a result, no one knows where they should go to find what they need; search yields numerous incompatible results; navigation is inconsistent; and performance is degraded.

On the other side, we’ve seen enterprises make it too hard to get started: in the interest of governance, they establish a 30-day waiting period, establish stringent pre-education requirements, and curtail functionality to the point that SharePoint is only a web-fronted file share – without versioned libraries, customization, apps, forms, data, blogs, wikis. Ugh. Either way, you’re not balancing manageability and usability.

Likelihood of project death: about 50%.
Conclusion: Evaluating Adoption Success

Sustained adoption requires a level of ongoing governance oversight and review. As a start, here are five things to do a few months after a new SharePoint rollout.

Check the search logs.

Search logs are a rich environment for information architects. No two users will use a site exactly the same way—but many of them use search when they can’t find something. Understanding the mostly frequently searched terms and documents tells you about what users want but can’t easily find. If the number one searched for document is the corporate holiday schedule, shouldn’t that be prominent on your home page?

Similarly, the rest of the search history gives you a great dataset for how to build a better navigation structure and rich tag sets. It’s another way to listen to your users and give them what they want, without requiring them to articulate their needs.

Monitor My Site usage.

If you’re rolling out My Sites, check to see how many users have updated their profiles. If you’re somewhere around 30-60%, you’re off to a good start. However, it’s common for user profiles to languish, and, if that’s the case with your SharePoint, you may need to strengthen the message with some ongoing training.

Check content growth trends.

SharePoint planning usually forecasts some level of storage growth, say 10-20%. Take a look at how your major content pools have grown to see if those numbers are on track. Site Collection Web Analytics provides a high-level trend chart. You should watch for high growth (which suggests great adoption) as well as flat growth (a warning sign).

Repeat rollout training.

This is simple: whatever training you helped during kickoff week should be repeated. Some users may have been unavailable. Other users may have forgotten what they heard. Yet others are new to the company. Repeating the training not only helps users but demonstrated a level of commitment to the platform that sustains user confidence.

Re-evaluate your roadmap.

Be honest about what works and what doesn’t. Not every solution will be perfectly used, and SharePoint is no exception. Don’t be afraid to propose changes in operations and support as you gather additional information about usage and satisfaction.
About Quest AttachThis

The right tools can help speed user adoption by making SharePoint easy and convenient to use. For example, Microsoft Outlook is likely the preferred method for content collaboration by users in your organization. Users probably complain about its drawbacks – frustrating attachment searches, disparate updates to the same document, and those pesky out-of-space email alerts – but they are unlikely to change their behavior and use SharePoint instead simply because you ask them to.

Instead, make it effortless for them. Quest AttachThis is a simple Microsoft Outlook add-in that integrates with the work patterns of your users: when they send an email attachment, it asks them if they want to store that document in SharePoint and send a document hyperlink to the email recipients instead:

![Image of AttachThis interface]

Figure 1: AttachThis makes it easy for users to choose SharePoint over email attachments for collaboration.
AttachThis then replaces the email attachment with a secure link that is automatically sent to the recipients. It’s easy – the user never has to leave Outlook – and everyone will immediately reap the benefits of having the attachment in SharePoint:

- Collaboration is simpler because SharePoint automatically consolidates edits from various team members into a single document.
- Collecting feedback is easier because users can take advantage of SharePoint’s intrinsic feedback-gathering process instead of storing comments in email.
- Users spend less time searching for the right email attachments.
- Work is no longer interrupted by out-of-space email alerts.

For more information, visit [www.quest.com/attachthis](http://www.quest.com/attachthis).
About the Author

Chris McNulty is a Strategic Product Manager and Evangelist for SharePoint Solutions at Quest Software. Chris is a Microsoft Certified Technology Specialist (MCTS), Microsoft Certified Systems Engineer (MCSE), and a member of the Microsoft Solutions Advocate and MVTSP programs. A frequent speaker at events around the U.S., Chris is the author of SharePoint 2010 Consultant’s Handbook – Managed Metadata Service and writes at www.sharepointforall.com and the KnowPoint blog at http://www.chrismcnulty.net/blog.

Prior to joining Quest, Chris led the SharePoint consulting practice at KMA, a New England-based Microsoft Gold Partner. He holds an MBA from the Carroll School of Management at Boston College in Investment Management and has over twenty years' experience in financial services technology with John Hancock, State Street, GMO and Santander. He lives with his wife, Hayley, and his children, Devin, Nathaniel and Rachel, in Milton, Massachusetts.
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Contacting Quest Software

PHONE  800.306.9329 (United States and Canada)
If you are located outside North America, you can find your local office information on our Web site.

EMAIL  sales@quest.com

MAIL  Quest Software, Inc.
      World Headquarters
      5 Polaris Way
      Aliso Viejo, CA 92656
      USA

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