SharePoint Roadmap for Collaboration

Using SharePoint to Enhance Business Collaboration

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Chapter 1. Your Roadmap to SharePoint

I’m a fan of The Three Musketeers, and the subsequent movie The Man in the Iron Mask. There’s a scene in the 1998 MGM edition of The Man in the Iron Mask where Aramis outlines to D’Artagnan, Athos and Porthos the evil nature of King Louis XIV. He prefaces his request for their help with this line, “Here is the problem at hand.” This book is my response to the many people who preface their interactions with me with that same line.

In this chapter, you will:

• Learn the nature of the problem at hand.

• Gain an overview of the structure and contents of this book.

• Discover why this book is focused on the collaboration aspects of SharePoint.

• Explore the difference between SharePoint Roadmap and Seamless Teamwork.

• Understand the intended audience for this book.

• Find out whether I love SharePoint, or not.
The Problem at Hand

Lisa from the United States wrote to me in late May 2009:

> At my firm, we have SharePoint but no one owns it and it is not supported, although it is a “production” system we in IS are supposed to use. I’m a main contributor and user, and I try to guide employees in using SharePoint effectively, but I have no mandate to do so.

> The firm I contract to (I’m the only information architect / document manager / tech writer in the company) is in the midst of porting over a document-intensive, hierarchical network system (that didn’t work well in the first place, hence my being brought in by a savvy development manager) into our untended jungle of MOSS 2007 implementation. Let’s call my firm the ancient city of Troy. I consider the current effort underway (it’s not really organized enough to be a project or initiative) the “Trojan Horse.” Looks good on the outside; guaranteed to wreak havoc later, when it’s inside the gates.

Lisa put the problem at hand into a great set of words: our firm has SharePoint, but no one is doing the business stuff to make it work. Lisa is but one example of the many people that I have come across over the past couple of few years with this same problem. Consider the following examples:

- A large firm adopts SharePoint, but when a business team starts using it instead of email and file attachments, they do so in such a way that all of the old problems with document chaos reoccur.

- Another large firm needs to track risks and issues for a project, but instead of using the newer capabilities of SharePoint to support risk and issue tracking and multi-project aggregation for a summary roll-up, the project manager keeps using an Excel spreadsheet.

- A firm has over 300 business projects being managed through SharePoint, with multiple people involved in each.
The design of the SharePoint site for each project is different from every other site, however, leading to inconsistencies in layout and usage, and increasing the difficulty of training staff.

- An IT department installs SharePoint because it comes almost free with their current licensing agreement with Microsoft, but after two years of learning how to install, administer, and develop on SharePoint, they have no clue about how using SharePoint will translate into making work life better for staff.

My conclusion, then, based on Lisa’s example and the others I have quoted above, is that something is missing from the conversation, thinking and planning when SharePoint is selected to support and enable business operations. It’s my contention that this missing ingredient is “the business stuff”.

“The Business Stuff”

SharePoint Roadmap is about the business stuff of SharePoint. My intent in writing it is to help you become more capable in making SharePoint work at the business level. To that end, there are six focal chapters in SharePoint Roadmap:

- Chapter 2 focuses on frameworks for improving business operations, and puts technology like SharePoint in its place. This chapter makes the case that it’s not the technology that makes a difference to businesses, teams and people, but it’s the way it is used that makes the difference. Chapter 2 also addresses the idea that “governance will save SharePoint”, and shows why that is not the case.

- Chapter 3 evaluates the capabilities of SharePoint to support collaboration in business organizations. Our work to improve the way business gets done relies on a clear understanding of how and where a particular technology is able to help. This chapter looks at where SharePoint naturally shines, and where there is more work for Microsoft to do in the long term. In the short term, there
will be some additional work for you and your firm to cover current weaknesses, if appropriate to your user population.

- Chapter 4 addresses the main governance themes when using SharePoint for collaboration. Chapter 4 is not an attempt to prove that governance will save SharePoint, but rather outlines a pragmatic approach to making decisions about the particular governance themes that need to be investigated and agreed upon when using SharePoint for collaboration.

- Chapter 5 deals with engaging the business side of the house with the technology capabilities of SharePoint. In other words, it talks about how an IT department that has SharePoint up and running should approach and work with the business side of the firm. Clearly, having a nice shiny SharePoint implementation isn’t the point—doing business better is.

- Chapter 6 talks about strategies and tactics to encourage end user adoption of SharePoint. And in particular, how do you encourage individuals, groups and teams to change the way they work to take advantage of the collaboration capabilities in SharePoint? In most cases, people and groups will have to change some aspects of the way they work in order to derive business benefit from SharePoint.

- The final focal chapter, Chapter 7, provides a template for a Quick Start when using SharePoint for collaboration. The intent of this chapter is to draw together everything we have looked at in the pages of SharePoint Roadmap and provide a simple way forward. You’ll be able to start with the counsel in Chapter 7, and course-correct and course-adjust as you get more experience in the real world of your firm.

SharePoint Roadmap finishes with Chapter 8, which rounds out the book with signposts to various resources to help you in your journey with SharePoint. For example, you’ll learn how to sign-up for the SharePoint Roadmap newsletter, as well as how to bring the SharePoint Roadmap Workshop to your firm.
Using SharePoint for Collaboration

If you’ve spent any time with SharePoint, you’ll know that it does everything, or actually, could be made to do pretty much anything. It’s an expansive “platform”, which means that what SharePoint becomes is ultimately up to each business or organization. The choices you make about how to use the platform drives what it becomes for you. There are pros and cons to this, which I don’t dive into just yet, but suffice to say, you either end up with a set of good capabilities or a set of very bad ones.

One of the base capabilities in SharePoint, ready to be melded to what the firm wants to do, is “collaboration”. In technical terms, the capabilities like team sites, wikis, document libraries and lists can be used by more than one person, enabling multiple people to have shared access to and manipulation and creation rights of a set of data elements. If you wrap this together with the appropriate human factors of collaboration—such as a shared purpose and an agreed way of working toward reaching that purpose, then SharePoint can support and enable collaboration between people.

These collaboration-enabling aspects of SharePoint form the focus of the counsel in this book. SharePoint has other aspects—for example, enterprise search, portals, content management, and business processes—but these are not the focus of SharePoint Roadmap. It’s not that they’re unimportant, but they are often secondary to using SharePoint for collaboration. For many firms, enabling collaboration in new ways between its staff members and external collaborators is a primary driver for embracing SharePoint.

There is a second reason for the intensive focus on the collaboration aspects of SharePoint: while people use search tools to find information that’s helpful to their work and portals to help them access the places where they work, people use collaborative tools to get work done.

• Search is a means to doing better work; it’s not the place of work itself. And you either use what you’re given by the search team, or you complain about a lack of findability.
• Portals in SharePoint are the aggregating metaphor to help people find the work that needs to be done.

• The publishing side of Intranets in SharePoint is about what a small group of people do to communicate with the rest of the business. People have to take what they’re given.

But with the collaboration capabilities in SharePoint, it’s the locus at which the work of the firm takes place. It’s where people will increasingly go to carry out their work tasks—or at least, where people should be going to carry out their work tasks. Due to the readily available alternatives for collaboration between groups and teams—the traditional email approach, or newer hosted services that can be quickly purchased by smart groups—there is a much higher degree of voluntary embrace required by individuals for collaboration in SharePoint to work. For all of these reasons, a book is required.

There is a third reason too, and it goes to the heart of what collaboration means: groups and teams use the collaboration capabilities of SharePoint. Due to the social nature of this usage, the way that individuals in these groups and teams use the collaboration capabilities have implications for what others can and can’t do. Thus the collaboration capabilities require special attention, as this book outlines. In comparison, the other features of SharePoint—portals and search, for example—are used by individuals. John opens the search page, types a search term, and a set of results that may or may not be useful are returned. John uses what makes sense, and then goes on his way. How he uses search doesn’t have a direct bearing on other people in his team.

Finally, collaboration is my area of expertise, and is therefore the space where I have the most to offer you. I have been actively involved in helping people collaborate through technology since the mid-1990s, either as an application developer on Lotus Notes and Domino in the late 1990s, as an independent industry analyst from 2000, or as a consultant to firms on SharePoint over the past few years. This book provides a way for me to share my experiences and expertise with you, thus helping you in your journey with SharePoint.
SharePoint Roadmap vs. Seamless Teamwork

SharePoint Roadmap is my second book about the business side of SharePoint. Why does the world need a second one you ask? It will become pretty clear as you start making your way through SharePoint Roadmap that the scope and scale of this book is much bigger than my first book, “Seamless Teamwork: Using Microsoft SharePoint Technologies to Collaborate, Innovate, and Drive Business in New Ways”. Actually, Seamless Teamwork is an example of a user adoption strategy, so I talk more about Seamless Teamwork (the approach) in Chapter 6. But here’s a one sentence statement of difference: **Seamless Teamwork helps business teams understand what SharePoint can do to enhance their collaborations, whereas SharePoint Roadmap for Collaboration helps IT departments understand how to talk to business teams about SharePoint.**

There’s another difference between the two books that I want to address. Microsoft Press published Seamless Teamwork, but SharePoint Roadmap was self-published. I have written SharePoint Roadmap without a book contract, and have paid to get it published myself. I did that for one reason: faster time-to-market. This entire book was written and published within a 6 week time period in May and June 2009. Getting the signed contract with Microsoft Press for Seamless Teamwork took longer than that! That’s not to throw cold water on the idea of having a book published by a “real publisher”, just that for the material in this book, it needs to get out faster and more widely than I could do with a “real publisher”. And let’s be clear too, that self-publishing SharePoint Roadmap in June 2009 does not in any way preclude me from having it published by a “real publisher” later on. This edition of SharePoint Roadmap is either first base or a home run. Only time will tell.

In conclusion, I believe in the messages of this book enough to write and publish it at my own cost without a book contract.
SharePoint “Roadmap”: The Concept

I know in the technology industry that a “roadmap” related to a product has a specialized association. It refers to what the vendor is planning for future editions of a given product. So vendors proclaim their upcoming “roadmap”, industry analysts critique “roadmaps”, and customer organizations make future purchasing and deployment plans based on a “roadmap”.

I use the term “roadmap” in a very different sense in this book. I am not addressing the future technical capabilities that Microsoft will include in SharePoint or related products. On the contrary, I will be laying out a series of vistas—oops, can’t use that one either—“vantage points” as you undertake the use of SharePoint for collaboration within your business. This book is your guide to what’s coming up in your journey with SharePoint at a business level. The vantage points that I address—frameworks for improvement, governance themes, engaging the business, user adoption strategies, and more—will continue to be the essential part of your SharePoint work, regardless of what Microsoft does with the technical roadmap of SharePoint over the next few years.

By advocating that the vantage points in this book are more important than the technical roadmap futures from Microsoft, I am not arguing that Microsoft’s technical roadmap for SharePoint is unimportant. As you’ll see from Chapter 3, where I evaluate the capabilities of SharePoint to support team collaboration, there is much room for improvement at a technical level. I greatly hope that Microsoft will address many of the technical shortcomings that I raise in Chapter 3 in its upcoming technical roadmap for SharePoint. However, there are two statements that need to be made and that have to sit side-by-side:

• Even if the technology of SharePoint is perfect, by itself that will not drive success; and

• Having more perfect technology makes applying some of the processes in this book easier, but it doesn’t eliminate the need for them.
In conclusion, come what may from Microsoft with the SharePoint technical roadmap, you will still need this book. The mindset, ethos, and skills addressed in this book will enable you to make SharePoint succeed in your organization almost (but not quite!) irrespective of what Microsoft does with the technology going forward. **The game is always about how you link technical capability to areas of the business that need improvement and enhancement—and that’s what this book is about.**

**Intended Audience for SharePoint Roadmap**

It’s hard to state a single intended audience for this book, because the book is about bridging the divide between those that provide great technology as their work and those that consume great technology in doing their work. Just like a real roadmap is used by different people for different purposes, so it is with SharePoint Roadmap for Collaboration. My hope is that:

- Senior business leaders will read SharePoint Roadmap and embrace it as a way of improving business collaboration. They have to set the stage by saying “this is the way forward”.

- Business managers will read SharePoint Roadmap and work towards making the ideas and concepts in this book come to life in their teams, groups and departments. They have to reach out to the IT department for help and understanding about the possibilities when using SharePoint.

- IT professionals will read SharePoint Roadmap and adopt the recommended approaches in their interactions with the business groups. They need to focus less on the finer details of the technology, and more on business engagement and user adoption.

Ultimately someone has to take the lead charge in each firm on making SharePoint Roadmap come to life. At your firm it could be a businessperson with savvy IT understanding, or it could be an IT professional with clear business insight. Alternatively, it could be
someone in the intranet or knowledge management team, or an outside expert consultant. Regardless of who it is, it has to be done.

Do I Like SharePoint?

After reading my work or hearing me speak at a conference or workshop, people sometimes ask “Do you even like SharePoint?” As I write this, I’m searching the crevices of my brain to figure out whether I do or not, or more accurately, how I describe my reaction to SharePoint. Sure I like it—it’s “okay” and “interesting”. SharePoint is the “thing”, though, that the people I love to work with are experiencing and experimenting with, and so I am grateful to SharePoint for creating a conduit for conversation and interaction with others. I really love that about SharePoint—it’s the people and their experiences that I care about, not the geeky technology.

One of the responsibilities of being an independent analyst and consultant is to speak the truth as you see it, based on your research, your experiments, your consulting engagements, and your conversations. As this book will show, I take that responsibility very seriously, and so when you read about my position on SharePoint for collaboration in Chapter 3, understand that I’m putting that responsibility into play. I don’t act in Chapter 3—or anywhere else in this book—as a Microsoft fan boy, with rabid evangelism for SharePoint in line with the company playbook. I’m writing this with the clear objective that you can take what you’ve received from Microsoft, and in conjunction with the tools and approaches in this book, make SharePoint work for your firm. That’s my hope and dream, and it’s in line with that vision that I share the following chapters with you.
Summary

In this chapter, I have outlined why I’ve written SharePoint Roadmap for Collaboration. The main reason is to provide you with an understanding of the business side of embracing SharePoint to support collaborative activities within your firm. Along with outlining the six focal chapters of SharePoint Roadmap, I have addressed why this book focuses on the collaboration aspects of SharePoint, and how this book is different from my first book, Seamless Teamwork.

With this introduction stated, and our journey begun, let’s turn our attention to Chapter 2, which you will recall is about frameworks for improvement.