

How to Use the Sponsors and Stakeholders Site

Chapter 11 of Seamless Teamwork

This is chapter 11 of “Seamless Teamwork: Using Microsoft SharePoint Technologies to Collaborate, Innovate, and Drive Business in New Ways”, written by Michael Sampson and published by Microsoft Press (2009). It extends the main ideas of Seamless Teamwork to the Sponsors and Stakeholders site, as set up in Chapter 3. It is an online-only chapter, and is available free to people who have a copy of the book.

In this Chapter, you will:

- Learn about the two faces of the Sponsors and Stakeholders site.
- Explore how project sponsors and stakeholders are different from project team members.
- Find out how the project team can use SharePoint to keep the sponsors and stakeholders informed.
- Discover how to use the calendar to coordinate communication and interaction.
- Consider some of the advanced options for using the Sponsors and Stakeholders site.

Kelly glanced at her calendar for the upcoming week, and gasped. "I know it's planning time here", she said to herself, "but 27 meetings?" Now that SharePoint had become a fixture for all projects at Fourth Coffee, while the number of meetings hadn't increased, they were much more visible. "I used to be able to claim ignorance on some of these project meetings," she chuckled to herself, before settling in for a detailed review of what was coming up.

With being involved in so many concurrent projects—Kelly's latest project tally was 32—she needed some way of quickly snapping her full attention from one project to the next. Whether her involvement was as a direct sponsor of the initiative or instead as an interested party, it was essential to everyone's sanity that they could change focus from one project to the next with a minimum of hassle. One of the disciplines Kelly had instituted at Fourth Coffee was the "one page" overview in SharePoint of all project sponsor meetings. This meant that when it was time to work on the next project, she or anyone else could go to the one page overview in SharePoint and see the meeting agenda, the list of attendees, any supporting documentation, and the details of the meeting.

"I've got a status update meeting with Roger about Project Delta on Wednesday", Kelly said, looking up somewhat surprised. "I thought we just had a meeting about Project Delta. I wonder what this one is about?" Kelly opened the one page overview for Wednesday's meeting, and then nodded as the details came flooding back to her. "Oh that's right," she said, clicking her fingers. "Roger is giving us an update on one of the strategies they're considering. We had asked for more details last week."

With at least one interesting meeting to look forward to in the next couple of days, Kelly turned her attention to the rest of the meetings.

The Sponsors and Stakeholders Site

In Chapter 3 we set up a special site for the Sponsors and Stakeholders to use, but we didn't talk about how to make use of it in the pages of Seamless Teamwork. While it is definitely possible to reason from the general principles in Seamless Teamwork about how to use the site, there are some sociological and practical differences between project team members and sponsors and stakeholders that lead to a different pattern of use. The purpose of this chapter is to examine these differences, and to provide a strategy for the effective use of the Sponsors and Stakeholders site.

The Two Faces of the Sponsors and Stakeholders Site

The Sponsors and Stakeholders site we set up for Project Delta serves two purposes:

1. Communication with the project team; and
2. A meeting place for the Sponsors and Stakeholders.

First, it provides a place for managing the communication flow from the project team to the sponsors and stakeholders—essentially a way for the project team to keep the sponsors and stakeholders up-to-date with what's happening in the project. Second, it offers a place where the sponsors and stakeholders can meet in private, away from the direct purview of the project team.

It is likely that just as these two purposes are valid for Project Delta, they are also valid for the sponsors and stakeholders involved in your projects. Before investigating how to use the sponsors and stakeholders site to meet these two purposes, let's consider the sociological differences between being on a project and being a sponsor or stakeholder.

Different Sociology for the Sponsors and Stakeholders

The sociology for the sponsors and stakeholders involved in a project is very different to the sociology of the project team itself. Consider the following four points of difference:

- The site is a place of work for the project team versus a place of reference for sponsors and stakeholders.
- Being "involved" in a project as an inner team member requires a different level of engagement compared to being "kept informed" or being an interested party in the outcome.
- The project team has a tendency toward greater informality in interaction and conversation.
- The project team has greater familiarity with specific project content in the site.

Work vs. Reference

For the project team, the Inner Team site becomes their main place of work, usually on a day-by-day basis. We have already explored this throughout Seamless Teamwork, looking at how a project team can make use of SharePoint for the totality of its work.

Sponsors and stakeholders, by comparison, use their site as a place for reference. Their interactions with the site are more aligned with "Tell me what's going on with the project?"

Involved vs. Informed vs. Interested

The second distinction in the sociology is the difference between being "involved" in the project, being "kept informed" about the status of the project, and having an "interest" in what happens as a result of the project.

These three different levels of engagement result in different requirements to support each group. For example, the stakeholders group have an interest in what happens, and have a degree of input into the framing of the project in the early days, but they have less of an ongoing involvement in what happens in the project. Their responsibility is to give their input to the project team, and the project team needs to listen to it and decide whether to embrace it early or not. But there isn't a burden on the team to do much more than let the stakeholders know what's going on at certain points.

Sponsors are a different animal. They have a vested interest in the outcome of the project, as well as an organizational mandate to actively shape the project as required. They can cancel the project, allocate it further funding, and do all sorts of things that can enhance or diminish the effectiveness of the core inner team members. This means that the sponsors play a crucial role in the ability of the team to get its work done, and thus the team has a greater necessity to keep the sponsors informed appropriately.

Informal vs. Formal

The project team tends towards greater informality of interaction and joint work over the duration of the project as people get to know each other better. As they work together, they build up a social awareness of the other people on the team that streamlines conversation, as well as a common mental model that enables interaction to be shorter because people get to know what the others are thinking. There is more of a shared cognition in the inner team, meaning that things don't have to be stated in so much depth.

Sponsors and stakeholders have a lower ability to create this common set of experiences because their interactions are less frequent and less in-depth. This means that they have to communicate in more formal ways, because they lack a well-developed shared cognition of what's happening in the project. Things that are implicit to the inner team have to be stated explicitly within the sponsors and stakeholders groups. This isn't to say that sponsors and stakeholders can't get to a place of greater informality, just that it will take a longer elapsed time.

Content vs. Structure

The final point of difference in the sociology is the level of familiarity that is developed with the content and structure of a site. The project team develops a deep familiarity with both the structure and content in the Inner Team site. Over time, due to repeated usage of the site, the structure becomes invisible to them and the content rises to the foreground of their attention. They almost intuitively know where to find things in the site, because they carry around a mental sense of the status of the project. Repeated use leads to deep awareness.

It is different for sponsors and stakeholders. Because these people generally have an involvement or interest in many projects across the organization, their capability to have a deep interest in those projects is limited. The implication of this is that when they visit a sponsors and stakeholders site, they will have little familiarity with the specific content, and thus the structure must facilitate quick access to

the content of importance. Having a simple structure that enables them to quickly identify the content of relevance is crucial to the success of the site.

This difference points to the benefit of having a common structure across all of the sponsor and stakeholder sites: it makes the interactions of sponsors and stakeholders with many projects much easier. Because the structure is the same from project to project, they can enter any specific site and quickly know what's going on and what is required of them.

The Key to Success is Making Directives Clear

The key to success with a sponsors and stakeholders site is to provide clear directives:

- Don't make them guess what they have to do. Tell them directly.
- Don't make them search for what they need to read. Provide links.
- Don't leave them to figure out what decisions they are expected to make. State the pending decisions clearly.

Provide clear directives. Due to the occasional frequency which sponsors and stakeholders visit their project site, it is crucial to the success of the site that what they have to do is made very clear.

It can be tempting to think that people who need such clear directives are mentally deficient, because they can't find the stuff for themselves. There is a more reasonable perspective however: sponsors and stakeholders are busy, and don't have the time to muddle around searching for and looking for the things that project team members know intimately.

The Project Leader Spans the Boundary

With the Sponsors and Stakeholders site being used as the bridge between the project team and the sponsors and stakeholders, there needs to be someone who will walk back-and-forth across the bridge! This will usually be the project leader, but it can be another nominated person from the Inner Team. For the purposes of this chapter, we will assume that it's the project leader who has these additional rights. That may be the same for your organization, or it may be someone else. The specific person who fulfils the role is much less important than the fact that it is filled by someone.

The project leader spans the boundary between the project team and the sponsors and stakeholders. This means in practice that they have additional access rights to the Sponsors and Stakeholders site that the other people on the Inner Team do not. But it does not mean that they have complete and unremitted access to the Sponsors and Stakeholders site. They get to see and contribute some things, but they are prevented from accessing other things.

Fulfilling the Two Purposes of the Sponsors and Stakeholders Site

The Sponsors and Stakeholders site we set up in Chapter 3 is composed of three tools:

- An announcements list.
- A calendar.
- A document library.

Let's look at how these three tools can be used to meet the two purposes of the site.

Communication between the Project Team and the Sponsors and Stakeholders

The announcements list is the place where the project leader can communicate with the sponsors and stakeholders. When there is something to say to the sponsors and stakeholders the project leader creates a new announcement in this list. This works for many different things:

- Regular reporting, such as on a monthly basis.
- Important project happenings.
- The attainment of predefined project milestones.
- Changes in the composition of the inner team.
- Other ad hoc updates.

Email alerts are used to notify the sponsors and stakeholders of new announcements, although individual sponsors and stakeholders can elect to have an RSS alert instead. See Chapter 4 for details on how to work with alerts.

The calendar is the place where meetings are planned between the project leader and the sponsors and stakeholders. While the calendar tool as a whole is open to anyone to view, specific meetings on the calendar can only be seen by the people involved, because meetings are set up with unique permissions.

Finally, the document library is the place where the project team stores documents and files for the sponsors and stakeholders to review. However, so that this doesn't become a dumping ground for a loose collection of "something" files, each should be referenced from an announcement or meeting event to provide context. The document library is also used for hosting documents that require formal workflow treatment, as we explored in Chapter 8.

Taking this approach to managing communication between the project team and the sponsors and stakeholders means that the information is stored in a shareable place. It is not locked up in email accounts, and it offers business risk reduction by providing a way for other people to gain access to the information later on, as and when the composition of the sponsors and stakeholders groups change. Thus the complete history of communication is available for review, for those authorized to see it.

Enabling Coordination between Sponsors and Stakeholders

The calendar is the main tool used by sponsors and stakeholders for their own coordination. By using a calendar and the meetings therein, sponsors and stakeholders have a specific “thing” to work with at any point in time. It creates a regular structure that’s consistent every time, and is a way of working that is familiar to those who take on sponsor and stakeholder roles.

There are four types of meetings or events that will be put onto the calendar:

- Project milestones;
- Meetings with the project leader;
- Private meetings between the Sponsors; and
- Meetings between subgroups from the Sponsors and Stakeholders.

Project Milestones

The project leader needs to create a set of milestones for the project inside the Sponsors and Stakeholders site. These are day specific events within the calendar—tick the box “Make this an all-day activity that doesn’t start or end at a specific hour” when you create the milestone—that show the expected flow of the project. Having a shared set of items of this nature means that sponsors and stakeholders don’t have to ask about what’s coming up; they can open the calendar and see for themselves. It’s all there waiting for them, whenever they want to see it. And if they have added the calendar to Outlook, they will be able to see what’s going on without having to visit the site directly. It’s a good idea to preface the title of the calendar item with “(MILESTONE)” so that people know at a glance that it is a milestone to observe, not a meeting to attend (see Figure 11-1).

The screenshot shows a web browser window displaying the 'Calendar: New Item' form. The browser address bar shows 'Business Projects' and the page title is 'Project Delta Sponsors & Stakeholders'. The form is titled 'Calendar: New Item' and has a yellow header. The 'Title' field is filled with '(MILESTONE) Scenarios to be Fully Analyzed'. The 'Location' field is empty. The 'Start Time' and 'End Time' fields are both set to 9/10/2008. The 'Description' field contains the text 'The scenarios for Project Delta need to be fully analyzed by September 10.'. The 'All Day Event' checkbox is checked, indicating that this is an all-day activity. The 'Recurrence' and 'Workspace' checkboxes are unchecked. The form includes 'OK' and 'Cancel' buttons at the bottom.

FIGURE 11-1 Make it clear that milestone items are milestones not meetings

Meetings with the Project Leader

The project leader will have various meetings with the project sponsors. These meetings should be set up inside the calendar as Meeting Workspaces (see Figure 11-2).

Business Projects > Project Delta > Project Delta Sponsors & Stakeholders > Calendar > New Item

Calendar: New Item

OK Cancel

Attach File | Spelling... * indicates a required field

Title * Briefing with Project Sponsors on Scenario

Location Teleconference

Start Time * 9/3/2008 12 PM 00

End Time * 9/3/2008 2 PM 00

Description

Followup meeting with Roger and the Sponsors to dig deeper into one of the scenarios we discussed last week.

All Day Event Make this an all-day activity that doesn't start or end at a specific hour.

Recurrence Make this a repeating event.

Workspace Use a Meeting Workspace to organize attendees, agendas, documents, minutes, and other details for this event.

OK Cancel

FIGURE 11-2 Set up a calendar item with a Meeting Workspace for the meeting

The structure of the Meeting Workspace provides the “one page” overview that Kelly had instituted at Fourth Coffee, enabling her to get a snapshot overview of what was expected at the meeting:

- The objectives of the meeting.
- The people who will be attending the meeting.
- The agenda of the meeting.
- Documents that will be used during the meeting, or that need to be read in advance.

See Figure 11-3.

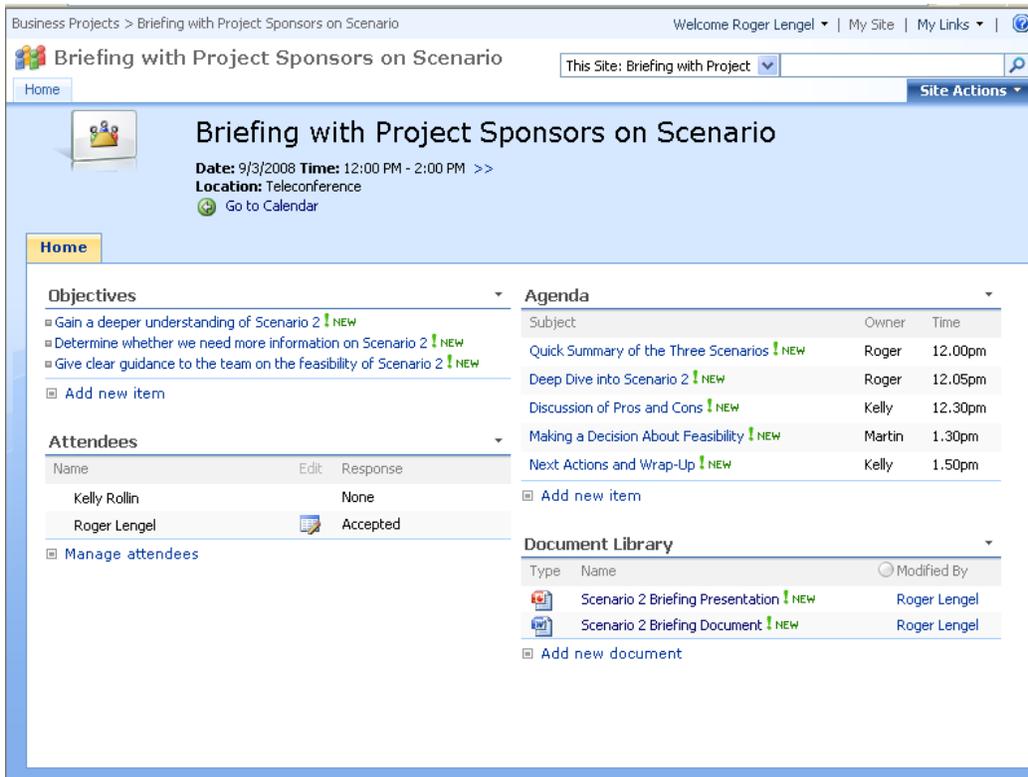


FIGURE 11-3 Meeting Workspaces provide a one page overview of the meeting

Sometimes meetings between the project team leader and the sponsors will be private meetings, meaning that project stakeholders shouldn't know about the meeting. In this case, you need to set unique permissions on the meeting, at two levels:

- On the meeting item in the calendar, click **Manage Permissions** to set the rights for which groups can read the item. By default, all items created in the calendar can be read by anyone accessing the calendar, so you will need to copy in the current permissions and then set up a unique set.
- On the Meeting Workspace, when you set it up, choose to have unique permissions rather than the same ones as the calendar itself.

You have to set the same unique permissions on both the item (so it can't be seen by unauthorized people when looking at the calendar) and the Meeting Workspace (so it can't be accessed through the "View All Site Content" link).

Private Meetings between the Sponsors

The sponsors need a place to hold their own private meetings, without the involvement of the Project Leader. These should be set up in the calendar, again as Meeting Workspaces, and with unique permissions on the calendar item and the Meeting Workspace, as we discussed above.

Meetings between Subgroups

The final type of meeting held through the Sponsors and Stakeholders site will be meetings between specific subgroups of the sponsors, stakeholders, or a mix of the two. Perhaps there are three people from the sponsors that want to talk about some aspect of the project, or two from the sponsors group

need to talk to three from the stakeholders group, or five from the stakeholders group want to put their heads together and make some decisions. If the outcome of the meeting will be shared with everyone, then each meeting can be set up as a Meeting Workspace with standard permissions. If it's a private meeting, set up the calendar item and the associated Meeting Workspace with unique permissions.

Add the Calendar to Outlook 2007

Sponsors and stakeholders should add the calendar from their site into Outlook 2007. This allows them to see the upcoming milestones, meetings and events whenever they are working inside the Outlook 2007 calendar. In addition, it means they can see project-specific milestones and meetings alongside of their other commitments and events; it gives each sponsor or stakeholder an individual view of the totality of their work reality, with full contextualization.

To add the calendar to Outlook 2007, open the calendar in the Sponsors and Stakeholders site. Click Actions, and then click Connect to Outlook.

Summary

This chapter has investigated how to support the sponsors and stakeholders of a project using the Sponsors and Stakeholders site set up in Chapter 3 of Seamless Teamwork. The main point is that sponsors and stakeholders have a number of factors that are different from project team members, and this impacts how they use their site.

Advanced Options for the Sponsors and Stakeholders Site

There are a number of ways to extend the ideas in the Sponsors and Stakeholders site, depending on the nature of your projects and your organization's approach to open access to information.

Multiple Calendars

You can add multiple calendars to the Sponsors and Stakeholders site, to simplify access and set up. Access can be set at the level of each calendar, and then all meetings or events within the calendar merely inherit permissions from above. This means that you would not need to set permissions on individual calendar items.

For projects with lots of meetings between the project leader and the sponsors, the sponsors themselves, and the stakeholders, rather than having one calendar for all of these meetings, and using different permissions to set who sees what, you can set up multiple calendars instead. Let's say you set up three calendars in the Sponsors and Stakeholders site: one for meetings between the project leader and the sponsors, one for all sponsor-only meetings, and one for stakeholder meetings. In each case, you then set the access permissions for the different groups at the level of the calendar, meaning that anyone who can see the calendar can also see all of the meetings inside the calendar. This means permissions are set once, and all meetings for a particular group are set within that calendar.

There is a one-time requirement for each of the sponsors and stakeholders to subscribe to the relevant calendar for their meetings (that is, to connect it to Outlook 2007), and in the case of the sponsors, they will have to subscribe to the two calendars in which they have an interest—the meetings with the project leader, and the meetings with their fellow sponsors.

Multiple Announcement Lists

The announcements list can also be duplicated, so that there is one announcement list for communicating with the sponsors, and a second one for communicating with the stakeholders. If you have a project with a large number of stakeholders, and if the communication to them is markedly different to what needs to be said to the project sponsors, then having two different announcements lists is the way to go. As with having multiple calendars, this allows for access privileges to be set at the level of the announcement list. People in the sponsors group see one announcements list, and people in the stakeholders group see the second announcements list.

One Page Overview via a Wiki Page

A third advanced option is to add a wiki page library to the Sponsors and Stakeholders site, and use wiki pages for the "one page" meeting overview. While a Meeting Workspace can be used to do this, it requires a willingness by the person setting up the meeting to add the various items into the appropriate places within the Meeting Workspace. This takes time, although it looks great once it's done. By using a wiki page for a meeting instead, there is a more freeform entry of those details:

- The list of attendees, along with their status
- The agenda of the meeting, in order of priority
- The objectives of the meeting
- Documents to read, offered as links to the document library
- The minutes of the meeting

See Figure 11-4.

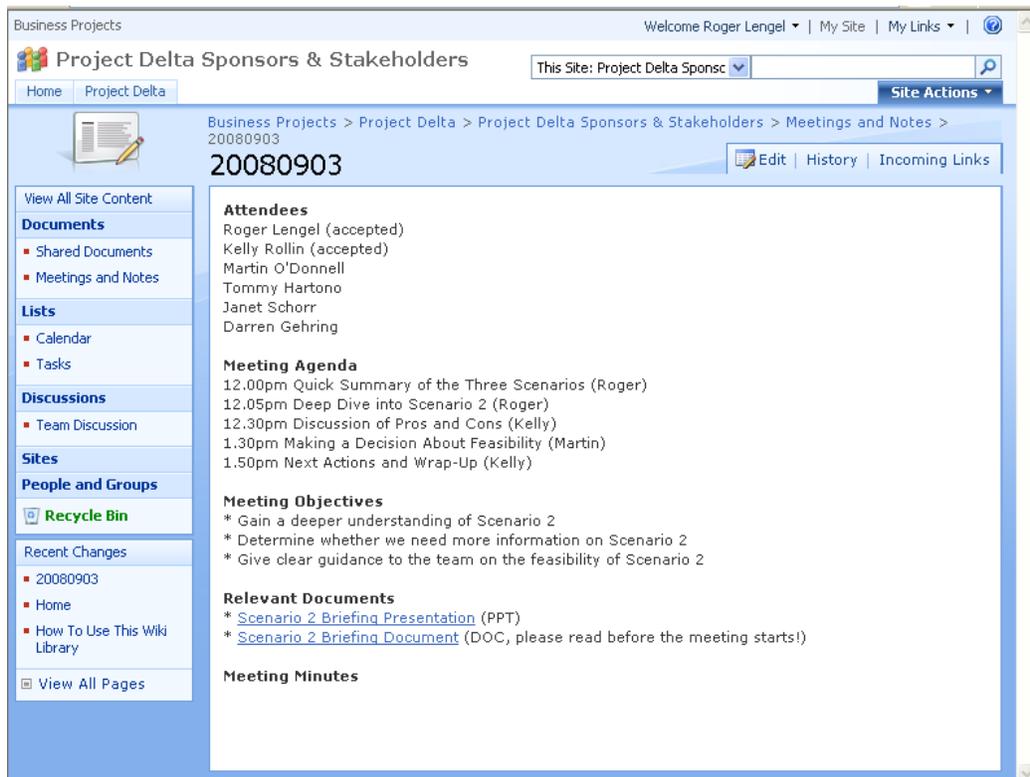


FIGURE 11-4 Using a wiki page for the “one page” overview of a meeting

To offer the “one page” overview via a wiki page still requires that you set up the meeting in the calendar—so that everyone has a time-based awareness of when meetings are happening—and meeting items on the calendar include a link to the appropriate wiki page. Note that you can set unique permissions on wiki pages too, if you want to make the contents of the page private to a specific subgroup.