

SharePoint Roadmap Governance Themes Workbook: User Adoption Strategies



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Executive Summary

How will you encourage effective user adoption of SharePoint for collaboration? Your organization has spent the time and money getting SharePoint installed, and now what? There are many strategies that can be used, some of which are effective, and some of which are not so effective. Choose the effective strategies, and you will see people making the transition to SharePoint. Settle on the ineffective strategies, and you will waste time and effort, along with turning people off. What's your plan for this essential governance issue?

This report examines the governance theme of User Adoption Strategies in relation to using SharePoint for collaboration. It extends and enhances Chapters 4 (governance) and 6 (user adoption strategies) of SharePoint Roadmap for Collaboration.

The report includes survey data on current practice in relation to User Adoption Strategies drawn from a worldwide survey of organizations using SharePoint for collaboration today. Survey results present current practice about the strategies being commonly used to encourage user adoption today, along with an analysis of which strategies are seen as being most effective. Two groupings of comments from respondents are also presented—what worked well in their user adoption work, and what they would do differently if they could start again.

Table of Contents

Introduction	3
Independent Research.....	3
Disclaimer	3
The Issue.....	4
The Options.....	4
Current Practice	5
Question 1. SharePoint Plus Other Tools.....	6
Question 2. Size of Organization	7
Question 3. Written User Adoption Strategy	8
Question 4. User Adoption Strategies in Use Today.....	8
Question 5. Effectiveness of User Adoption Strategies	10
Question 6. User Adoption Strategies: What Worked Well.....	12
Question 7. User Adoption Strategies: Doing Differently	17
Conclusion.....	21
About The Michael Sampson Company Limited	21

Introduction

Governance is the focus of Chapter 4 in my strategy book, SharePoint Roadmap for Collaboration (www.sharepointroadmap.com/roadmap.html). The chapter defines governance, provides an organizational structure for governing the use of SharePoint, proposes a decision process, and touches on key governance themes related to using SharePoint for collaboration. The intent of that chapter was to teach people how to govern SharePoint in their organizations, rather than giving a raft of simplistic answers about governance.

This report extends Chapter 4, providing much greater detail on the User Adoption governance theme. Although SharePoint Roadmap for Collaboration includes a complete chapter on User Adoption Strategies (Chapter 6), this report takes that material another step forwards. In particular, it includes new survey data on the use and effectiveness of particular user adoption strategies among organizations using SharePoint today. This report is one of about 10 reports that will make up the SharePoint Roadmap Governance Themes workbook, which is being published progressively throughout 2010 (see www.sharepointroadmap.com/governance.html).

User adoption is a key theme when using SharePoint for collaboration, because if people don't adopt SharePoint and go back to old ways of working—email and attachments for example—the organization gets no benefit from its investment in SharePoint. The technology is available, but isn't being used. The work is wasted.

There are ways of shifting people from current ways of working to new ways of working. A key finding from the survey respondents is that the most commonly used user adoption strategies are the least effective in driving or encouraging adoption, and equally, that the less commonly used strategies are among the most effective. Knowing this in advance will help you be much more successful in improving work life for the staff at your organization, not to mention help secure wider benefits for your organization.

This report should be read in conjunction with chapters 4 and 6 of SharePoint Roadmap for Collaboration (see www.sharepointroadmap.com/roadmap.html).

Independent Research

This report is an independent publication of The Michael Sampson Company Limited, and was internally funded. No vendor requested or paid for its preparation or publication.

Disclaimer

The information provided in this report is by necessity of a general nature, and its applicability to a specific business or organizational context is not guaranteed. Due professional care must be exercised in applying the ideas within this research report. All care has been invested in the preparation of this material, but the author accepts no responsibility for its application.

The Issue

What's the number one complaint from people charged with the implementation of new collaboration tools? They do the work, and then no one uses them! The very people whom the new tools are intended to help, empower, enable, and enhance ultimately reject the new tools and don't use them. Depending on which side of the fence you sit on, that's either a tremendous shame or a huge opportunity for improvement.

I see it as a huge opportunity. I believe in the power of good collaboration tools to make work life better, and by implication, I want to see the tools being adopted. However, after 15 years as a collaboration strategist—a mix of consulting directly to organizations on collaboration strategy, combined with numerous research reports as an industry analyst—the user adoption challenge is core and fundamental to moving ahead with improved approaches to doing work.

Collaboration tools aren't just a nice to have. In my SharePoint Collaboration and Governance masterclass (www.sharepointroadmap.com/seminar.html), I talk about four key trends that are raising the importance of having access to great collaboration tools at work:

- The increased pace of business. Decisions have to be made faster—decisions about responding to competitor moves, customer opportunities, and marketplace dynamics. How can you make effective decisions faster?
- The global nature of working with others. It is increasingly common to work with people who you can't work with in a face-to-face setting. You're in the United States. They're in France. Or Germany. Or Australia. How do you work together effectively?
- The IT savvy of new employees. Many new employees, especially among the younger crowd, have better IT equipment at home than they are given in the office. In addition, they have experience with using newer tools to collaborate with others. And what do most organizations give them? Email.
- The technology options to support collaboration. The past decade has seen rise to a multiplicity of new technology to support collaboration. There has been and continues to be tremendous innovation on the supply side.

This report on the user adoption strategies being used by current SharePoint customers aims to make a significant contribution to the capability of current and future SharePoint customers to make effective use of SharePoint. The report looks at the user adoption strategies being used by current SharePoint customers, but more importantly, analyzes which strategies are most effective for user adoption based on the survey responses.

In keeping with the language in SharePoint Roadmap, then, the issue or concern is: How will we encourage effective user adoption of SharePoint for collaboration?

The Options

As mentioned in the Introduction, there's a whole chapter in SharePoint Roadmap about user adoption strategies. It's Chapter 6. For the purpose of gathering survey data, the options from Chapter 6 were listed out for the respondents to read through. The complete list, as shown during the survey, is re-produced below.

1. **Classroom training.** Holding a training session in a traditional classroom where a trainer talks about the new way of doing things.
2. **Web-based training.** Offering on-demand training through a web-based training program.
3. **Pages on the Intranet.** A series of informational pages on the Intranet, that someone can read.
4. **Over-the-Shoulder Watching.** Visiting someone at their desk for the purpose of watching how they work, and in order to suggest improvements.
5. **Roadshow.** Putting on an event at different offices to advocate the use of the new collaboration tool, and to show people how it could be used.
6. **Sandbox.** Providing access to a "testing only" system, where people can try out new collaboration tools or features.
7. **Real-to-Life Scenarios.** Creating detailed descriptions of how the new tool can be used for a particular process or project.
8. **Exemplar Stories.** Telling stories about how other people within your organization are using the collaboration tool, and the benefits they are getting.
9. **Bulk Loading Party.** Holding an event to migrate necessary data from the old system to the new collaboration tool.
10. **Stop Doing, Start Doing Patterns.** Identification of a particular process and how it is going to be done differently in the future, as a consequence of new tools.
11. **Easy First Steps.** A series of simple first actions that someone can do within the new collaboration tool so as to get them using it for the first time.
12. **Zero Other Options.** Removing competing or alternative ways of working, so that people have to use the new collaboration tool.
13. **Executive Sponsorship / Support.** Where senior executive voice or demonstrate their support for the collaboration tool, in speeches or in actually using it themselves.

For more information on these strategies, see SharePoint Roadmap Chapter 6.

Current Practice

In order to capture data on current practice on user adoption strategies for SharePoint, a survey was created and administered through Survey Monkey. The survey was open between January and March 2010. While the overall survey collected data on many different collaboration tools—Microsoft SharePoint, Lotus Quickr or Connections, Socialtext, Google, and Central Desktop, among others—this report exclusively presents the summary data from respondents using SharePoint (185 respondents). The survey was advertised using a variety of channels—email distribution lists, Twitter updates, and various blog posts (on Michael’s blog, and on a Microsoft blog).

There were a couple of points of motivation to participate in the survey:

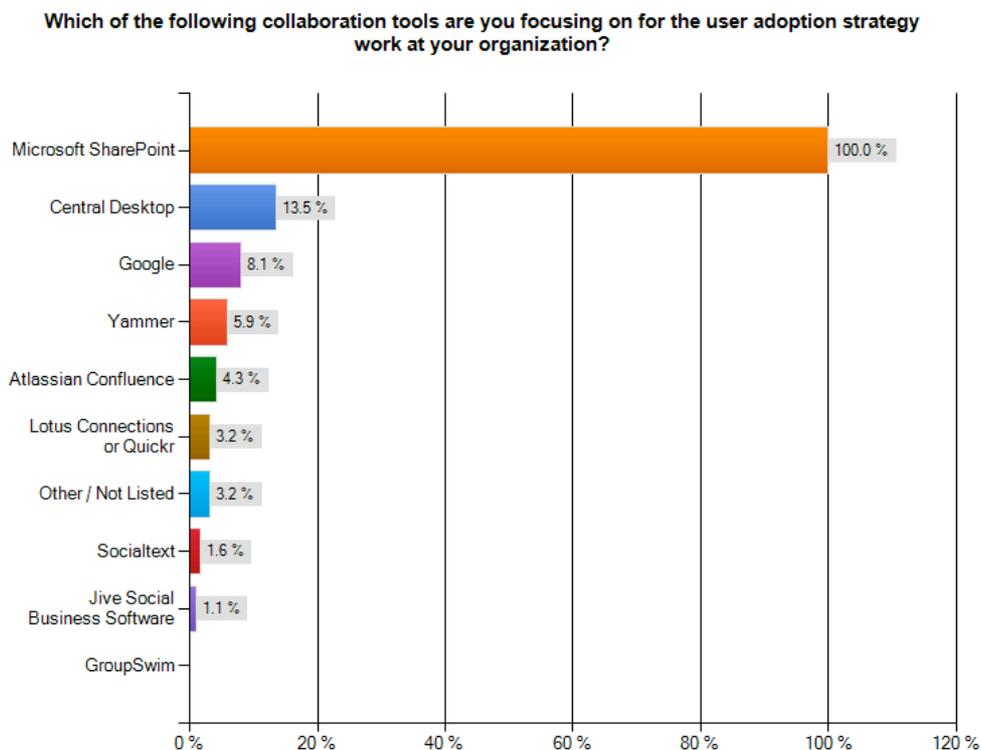
- Everyone who completed the survey and provided his or her name, organizational affiliation and email address was gifted a copy of this document. A total of 103 people met this requirement.

- Participants wanted to learn about this governance theme in SharePoint, and were willing to disclose what they were doing in return for wider insight.

Question 1. SharePoint Plus Other Tools

Respondents were asked to indicate which tools they were focusing on for their user adoption strategy work, due to the fact that the survey was designed to look broadly at user adoption strategies across multiple tools. Respondents could select multiple options, and so obviously everyone using SharePoint chose SharePoint, but respondents were working with other tools too, the most common being Central Desktop (13.5%), and the second most common being Google (8.1%). See Figure 1.

Figure 1. Collaboration Tools and User Adoption Strategies



SOME RESPONDENTS HAVE TO DEAL WITH MULTIPLE COLLABORATION TOOLS, AND AS SUCH HAVE TO ENCOURAGE EFFECTIVE USER ADOPTION ACROSS A COLLECTION OF TOOLS.

In the “Other / Not Listed” category, the following tools were mentioned:

- Two respondents mentioned Yammer. One referenced it in the current tense (“it is being adopted now”), and one referenced it in the future tense (“we are considering it”).
- Many tools were mentioned by 1 respondent each: Interwoven, NewsGator Social Sites, OpenText, FirstClass, Bluefield, Salesforce Chatter, Alfresco, Microsoft Office Communicator, WebEx, Pivotal Relationship, Atlassian Confluence, and Microsoft Groove.

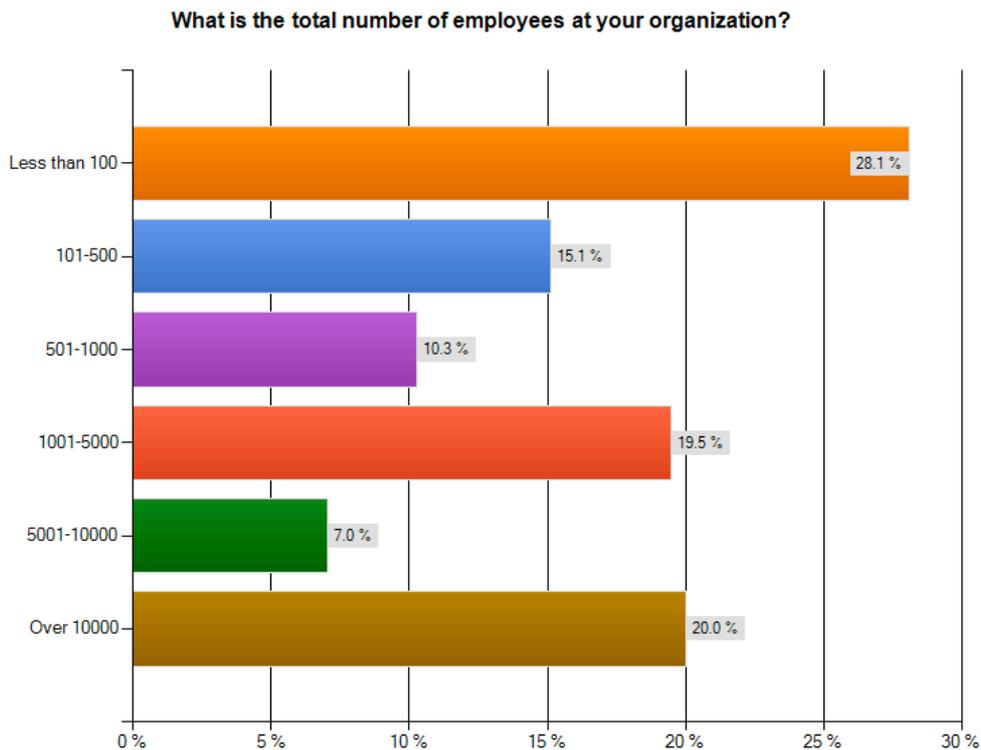
- Central Desktop features prominently in this survey due to the special encouragement given by Central Desktop (the vendor) to users of its service to participate in the survey (see resources.michaelsampson.net/2010/03/useradoption-centraldesktop.html)

At a user adoption level, a big implication of dealing with multiple tools is developing a clear understanding and shared commitment within the organization about where each tool is best used. In cases where there is just one tool (SharePoint), the user adoption work is easier (but not necessarily “easy”), because users only need to adopt one place to get their work done. When there are multiple tools in play, people have to slice and dice their work across multiple places—and therefore the level of capability required to know where each type of work activity should take place is much higher. That presents some challenges for simplifying the work environment.

Question 2. Size of Organization

Respondents were almost equally split between organizations with less than 1000 employees and those with more than 1000 employees. The largest group of respondents (28.1%) was from organizations with less than 100 people. The second largest group of respondents (20%) was from organizations with more than 10,000 employees. See Figure 2.

Figure 2. Organizational Size



RESPONDENTS WERE FROM VARIOUS SIZED ORGANIZATIONS, WITH THE LARGEST CONCENTRATIONS BEING UNDER 100 EMPLOYEES AND OVER 10000 EMPLOYEES.

Question 3. Written User Adoption Strategy

Only 16% of respondents indicated that their organization has a written User Adoption Strategy document or plan. **16.2% of respondents said they did have a written plan; the remainder (83.8%) said they did not have a written plan.** That is quite startling given the financial investment required to implement SharePoint! However, given the responses shared throughout the survey, it is clear that many respondents had a plan of some description, but it just wasn't written down.

There are benefits to having a written plan, such as:

- The process of writing down your thoughts shows that you have thought through the user adoption challenge, and that you have developed an approach to dealing with user adoption. Deliberate intent is required to write a plan.
- You have something to show to others, as a communication device, and as a tool to encourage shared thinking and dialogue. Given the breadth of use cases to which SharePoint can be applied, one would think this would be a good thing to have!
- It demonstrates that more than one person is involved; it's not a lone ranger approach. As we explore shortly the dynamic around the role of influential people in the user adoption process, having more people involved upfront is a good thing.

Finally, by documenting the user adoption strategy, I am not advocating a long and wordy document that merely takes up shelf space. One page will do, especially for smaller organizations. The one page strategy should contain the written summary of what will happen during the user adoption process—the various strategies that will be followed during the user adoption process. For example, it might say:

- We will start with base concept training.
- We will identify key opinion leaders in our firm, and make special efforts to educate them on the potential of SharePoint.
- We will run workshops with different teams and groups to explore the use of SharePoint to streamline and improve their work.

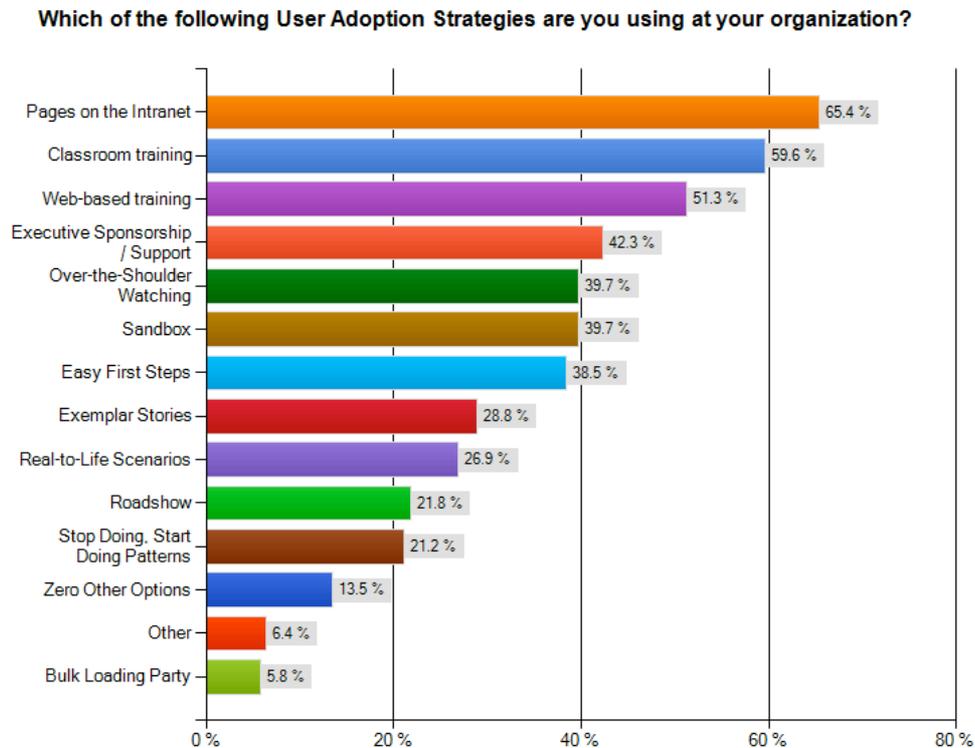
Finally, make sure you post the “one page strategy” in SharePoint! That's where it should be!

Question 4. User Adoption Strategies in Use Today

Respondents were shown a list of User Adoption Strategies at the beginning of Question 4—each with a name and a 1-2 line description. The list is re-produced in the section “The Options” (see Page 5 of this report), and included classroom training, web-based training, pages on the Intranet, and 10 others.

After reading the list, respondents were asked to indicate whether they were using that strategy, or not. Note that the question at this stage of the survey was a “yes/no” answer—the strategy was being used by the organization, or it wasn't. Ranking of the effectiveness of the strategy was the focus of a subsequent question. See Figure 3.

Figure 3. User Adoption Strategies Being Used



RESPONDENTS INDICATED WHETHER THEY WERE USING A PARTICULAR USER ADOPTION STRATEGY OR NOT. THE MOST COMMON STRATEGY WAS PAGES ON THE INTRANET.

The basic strategies are used most frequently. Education or training on basic concepts—via pages on the Intranet (65.4%), classroom training (59.6%), and Web-based training (51.3%)—are all focused on helping new users understand the features and capabilities of SharePoint.

After this “top three” grouping, however, the intent of the strategy changes. Executive sponsorship / support, over-the-shoulder watching, sandbox, easy first steps, exemplar stories, and so on, are all focused on applying the basic concepts of SharePoint within a particular group or organization. The intent isn’t education, but rather application.

Respondents were given the opportunity to comment about “Other” strategies they were using. Comments included:

- Brown-bag lunches, or “lunch-and-learn” sessions where a demonstration is given of SharePoint. One respondent wrote: *“We hold ‘lunch & learn’ sessions with Collaboration Leads (SharePoint Team Site owners) demonstrating their successes with the toolset for real results and team/business value. These advocates inspire enthusiasm in others, but also have had the unexpected outcome of encouraging friendly competition—we call it the ‘I want what she’s having’ syndrome—that has pushed various key individuals in the business to exploit collaboration via SharePoint in their own areas.”* From my perspective,

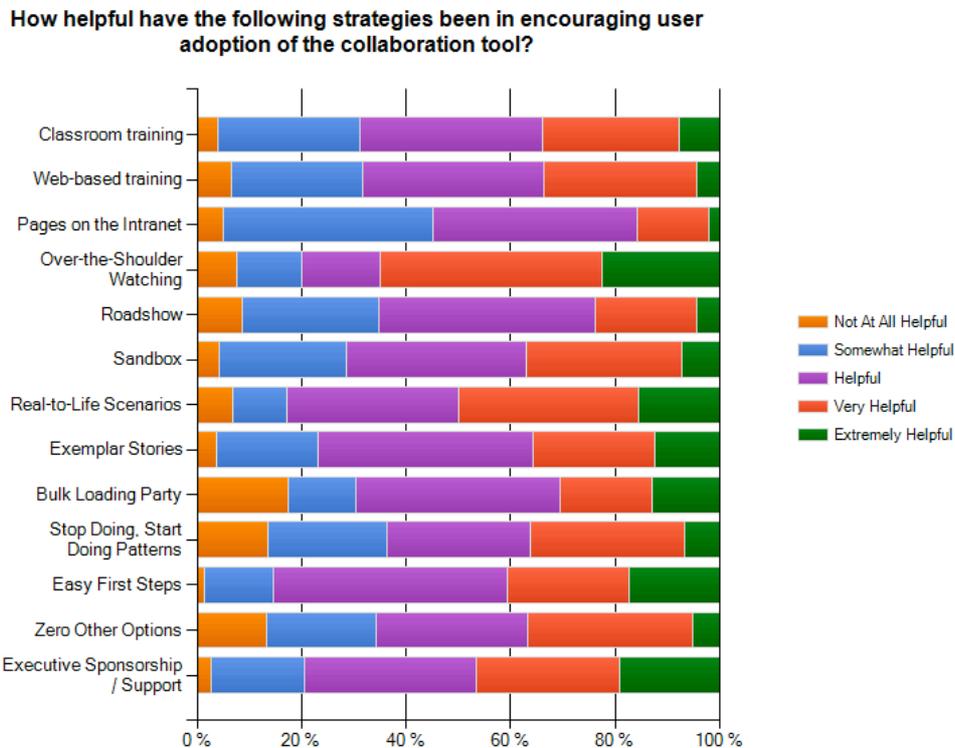
that “unexpected outcome” is the whole point of holding lunch-and-learn sessions of this nature! That’s exactly what you are looking for.

- Influential people who are willing to advocate the use of SharePoint can be very helpful. One respondent commented, *“Having someone who champions its use at every opportunity and is prepared to get involved in lots of things which may not, at first, seem directly relevant. In other words looking for any opportunity to use it.”*
- An adoption focus for end users isn’t always top-of-mind for SharePoint implementation partners. One respondent was honest enough to write: *“We are a Microsoft partner and SharePoint implementation firm. Many of us are first introduced to SharePoint from the developer’s perspective. Implicitly, we expect people to somehow assimilate the user aspects as well. You’re on your own in terms of the latter.”*
- Other approaches included Train-the-Trainer (in a geographically distributed organization), Internal User Groups (for sharing ideas and spreading best practices), and Organic Adoption (hoping that people will pick it up themselves with minimal oversight and direction).

Question 5. Effectiveness of User Adoption Strategies

In order to drive an understanding of the perceived effectiveness of each strategy, respondents were asked to rank the strategies they were using on a 5-point scale—“Not At All Helpful” (orange), “Somewhat Helpful” (blue), “Helpful” (purple), “Very Helpful” (red), and “Extremely Helpful” (green). The effectiveness of each user adoption strategy is shown in Figure 4.

Figure 4. Effectiveness of User Adoption Strategies



RESPONDENTS REPORTED THE PERCEIVED EFFECTIVENESS OF EACH USER ADOPTION STRATEGY. ADD THE RED AND GREEN PORTIONS OF THE BAR TO GET A QUICK SENSE OF EFFECTIVENESS.

This is where the results get interesting.

- Pages on the Intranet is the most commonly used strategy, but is the least effective (15.7% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”).
- The most effective strategy was Over-the-Shoulder watching (65% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”). However, it was only the fifth most used strategy.
- Some strategies that are not so commonly used are effective when they are used. For example, “Real-to-Life Scenarios” was ranked ninth (9) in being used as a strategy, but is the second most effective strategy (50% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”). Likewise for the “Zero Other Options” strategy: it is one of the least used strategies (ranking 12th of 13), but it ranked sixth in effectiveness—36.8% of respondents using the strategy said it was either “Very Helpful” or “Extremely Helpful”.

Common Strategies vs. Effective Strategies

The key insight from Questions 4 and 5 is that, generally speaking, the most commonly used user adoption strategies were not ranked by the respondents as being the most effective strategies for encouraging user adoption. What was commonly used did not always equate with what was seen as effective.

However, that's only half of the truth. The second key insight is that the most effective user adoption strategies rely on the most commonly used user adoption strategies being implemented first. Somewhere people have to be trained on the basic concepts of the tool—how to describe SharePoint, what its various tools are, how it works conceptually. This is essential material that provides the underlying context for the more personal touch—the over-the-shoulder watching (one-to-one coaching), the zero other options, real-to-life scenarios, easy first steps, and others.

This survey data therefore provides widespread empirical support for the recommendations in the “*SharePoint for Business: A Six Step Strategy for Achieving Collaboration Success and Improving Business with SharePoint*” report (resources.michaelsampson.net/2008/02/sfb.html) that I wrote in 2007. Basically Step Three of that report advocated a multi-stage process when introducing SharePoint, starting with training on basic concepts, and then moving to more personalized exploration and wider group impact analysis.

Question 6. User Adoption Strategies: What Worked Well

Respondents were asked to share any free-text comments about what worked well in their User Adoption Strategies work. Of the 185 people using SharePoint, 131 respondents provided a comment to this question. Note that this question was focused on gaining insight into the effectiveness of different user adoption strategies, but without the constraint of funneling answers into pre-defined categories. It was a free-text question! What follows is an analysis of the common themes mentioned in Question 6, based on a coding methodology developed and applied to each of the answers.

There were six commonly mentioned strategies:

- One-to-one coaching.
- Exemplar stories.
- Internal champions.
- Improve current processes, as in “demonstrate the benefit”.
- Zero other options
- User-centric design.

Let's examine each in turn.

Strategy 1. One-to-One Coaching

The effectiveness of one-to-one coaching was mentioned in the comments from 19 people. This was by far the most commonly mentioned strategy that respondents felt worked well. Comments from respondents included:

- “After a series of instructor lead classes on how a team could use SharePoint to organize their information and communicate with team members, most participants seemed mildly

interested and a few went on to establish a team site (from a standardized template). Of those, a few have grown more interested and asked for one-on-one coaching and training. Those who received the special attention REALLY got it and you could see the light bulbs going off in their head. This has led to teams taking a fresh new approach to the information they generate and maintain and there is a palpable amount of energy and interest behind this. I am hopeful that this will be contagious and that these early and enthusiastic adopters will become exemplars. So a broad based blanket approach of the basic topics to everyone, followed by more intense and personal coaching on a select few teams has been our approach. I am hopeful that the user base will become stronger and the movement will become more grass roots.”

- “Walking the floor and offering hands-on support from an internal evangelist or a roll-out project team member (an expert on SharePoint).”
- “One-on-one mentoring and tutoring.”
- “One-on-one 'over the shoulder' type training with key staff who then rolled SharePoint out to the remainder of the team.”
- “One-on-one hand holding for the most part.”
- “One-on-one sessions (over the shoulder)—where we can individually guide users and make the light bulbs go off. The trouble is once we walk away and let go of their hand, the new patterns may or may not stick. They seem to get it and enjoy it while we are there, but will commonly fall back into business as user and not keep growing.”
- “One-on-one visits followed up with continuous visits and assistance.”
- “Showing people, sometimes one-to-one, how SharePoint will make their life easier and/or make it easier for the whole team.”
- “Sit-down session with individual staff and classroom training in a small group.”
- “Training users who had a need, one at a time and face-to-face.”
- “We are very early in our adoption process for SharePoint, so I will speak to our adoption success with our previous collaboration workspace tool: eRoom. We had grass-roots support for this product, since at the time it was our company's first and only technical solution for team workspaces and therefore was eagerly adopted. We required mandatory training before users could have access, initially performed in classroom or in 'over-the-shoulder' settings, and eventually available through web-based training (both self-paced and WebEx style) which we considered KEY in successful user adoption. By requiring that users learn what was POSSIBLE with the tool, we enabled and empowered them to do their jobs better.”

In reading the above list, notice the nuances.

- One-time interventions are less effective than using one-to-one coaching (in its various forms) as a sustained effort over time. If the user is visited once, and then ignored, change in behavior is not going to take place.
- One-to-one coaching works best as part of a process.
- What works well for user adoption on SharePoint has worked for other tools in the past. This means you can reduce the risk within your SharePoint user adoption strategy by leveraging lessons and successful approaches from previous endeavors.

Strategy 2. Exemplar Stories

The second most frequently mentioned strategy was the use of exemplar stories—capturing and talking through the real life situations from your organization where other people have already used SharePoint to great effect. Exemplar stories work because it sets the technology of SharePoint within a business process or context, and gives people the opportunity to go and talk directly to other people in their organization who have already blazed the trail. Respondents mentioned this strategy 9 times. Comments included:

- “At our firm, what worked really well were the exemplars—not so much when just presented as 'stories' but very much when held has informal 'touch, see, taste' demonstrations with a follow-on Q&A session.”
- “Presenting case studies of how others in the company have used SharePoint to solve a business problem. We are also encouraging SharePoint champions to spread the word on the possibilities of the technology.”
- “Testimonials that give proof from real projects work well. It shows that SharePoint is more than an unproven top-down mandate.”
- “The most helpful approach we found was conducting a pilot with a specific group, and then having them share the success story with the rest of the business in their own words.”
- “The real life example stories with links to web-based training worked well. They allow readers to get a sense of the potential and then dig deeper if they choose.”
- “Users would much rather hear about how the technology worked for others who were doing the same job as them than from IT!”

The richer the exemplar story is the better. Provide details. Describe before and after effects. Let people ask questions. Enable people to talk directly to the people who were (and are) involved. Use the story to spark people’s interest in further engagement, social interaction and influence, and understanding.

Strategy 3. Internal Champions

The effectiveness of internal champions—people who will actively advocate the use of SharePoint as a standard approach to business—was the third most frequently mentioned strategy. If you choose (or discover) the right champions, they put a human face on SharePoint, and use their organizational, social and verbal influence to encourage other people to adopt and embrace SharePoint. Respondents talked about internal champions in a variety of ways, including:

- “Learning the benefits first hand and then setting an example.”
- “Brown bag sessions work really well. It provides a vehicle to build out your champions, and provides a place for asking questions and having interactive dialogue with other champions.”
- “End user champions to support colleagues.”
- “Finding 'champions' who spread the message. This has been very successful in building the use of discussion boards.”
- “A good selection of early adopters to spread the word.”
- “Having a champion who could engage clients and listen to their needs and quickly prototype a possible solution.”
- “Having the key players and executives use the system.”

- “Initial findings show that tech savvy people learned about SharePoint through roadshows, a relationship with IT, or through some awareness tactics, such as exemplar stories and scenarios on the Intranet. Some people took training, while others just played with the tool and became self-taught. They then became advocates and got their team onboard.”

If the IT department has been the prime mover in bringing SharePoint into the organization, then a key task they should attack as early as possible is the identification of credible people outside of IT who will active champion for SharePoint. Most business people have a greater likelihood of listening to non-IT folks.

Strategy 4. Improve Current Processes

SharePoint can be used for many different tasks, and one strategy that a number of respondents mentioned was focusing that use on improving current processes. Do something with SharePoint that end users see as valuable and beneficial, and you're half way home! Comments to this effect included the following:

- “In my experience the only way to get users onto SharePoint is if you capture a process they are using and make it more efficient. I've experienced working on long projects and developing ideas closely with the users only to find they asked for an ideal. And they reverted back to their existing low-tech process because that's what works for them and that's their day-to-day bread and butter. It's very important to watch what the users do on a daily basis and see if you can make that easier and more efficient.”
- “Keeping it simple and finding functionality that was simple and solved a common problem. For instance at my company there are many recurring meetings. There's always been an agenda that was distributed and printed for the meeting. After the meeting there was always a delay in getting minutes and action items out. By introducing the meeting site sub-site, we streamlined the distribution before and after meetings.”
- “Staff seeing the potential of the new system compared with the old way of collaborating.”
- “Focus on adding value for the users; what's in it for them.”
- “Having facilitated meetings/conversations with staff about what they need/want.”
- “Making the system do something useful that people actually wanted.”

Strategy 5. Zero Other Options

Another frequently referenced user adoption strategy was Zero Other Options. People wrote about the power of making SharePoint “the single place” to do work, compared to providing a set of alternate and equally valid places. The multiple option approach leads to confusion among users, and makes user adoption much more difficult. Comments included:

- “Basically just banning LAN Folder use for most cases and making people move documents into SharePoint.”
- “Web-based training for new social spaces and consulting to get the social environment implemented. Encourage replacement of email with social communities. Post emails to social communities and then refer to the social content instead of the email content.”
- “Making the old intranet inaccessible.”
- “In most cases I built new tools to replace old ones then removed the old ones.”
- “Removing other options.”

Thus the key lesson from this feedback grouping is to not sabotage the use of SharePoint by keeping alternate systems in place. Treat SharePoint as the place to work, and expect that everyone will step up to using it.

There's another side to this though. You can't start with the zero other options strategy; that will only succeed in turning people off. A couple of people mentioned the problems with the zero other options strategy in their responses to Question 7:

- "I don't think taking the old functionality away is necessarily is a good thing—I tend to believe that a replacement system (10 years after the release of the previous system) should be so simple and effective, people should find it difficult to resist using it."
- "I don't think the zero option works well—it sends the wrong message to users. We're doing this, and you have no choice, and we don't care if you don't want this solution to the need for collaboration tools (from the mouth's of users)."

So how do you use the zero other options strategy? Start with the other strategies that the survey respondents have mentioned—training, one-to-one coaching, finding target solutions of value, and so on. At some point, however, SharePoint has to become the place where work is done. I heard a good example of how to use the zero other options approach at a recent SharePoint Collaboration and Governance master class in Ireland. One attendee shared this story:

"Our engagement approach is to work with a specific group within our organization for three months. We learn about their work, and explore ways of improving their work through SharePoint. During the initial two months we develop a joint understanding of where and how improvements can be introduced, and we build a SharePoint solution to address their requirements. It is agreed at the beginning of the process, however, that at the three-month mark, they will no longer be able to use their current file shares. We turn them off at the end of our engagement with them."

Strategy 6. User-Centric Design

The final strategy that a number of respondents mentioned could be called the User-Centric Design strategy. While there is a degree of overlap between this strategy and strategy 4 above ("Improve Current Processes"), it is worthwhile to call out these comments in a different vein.

- "We gave site administrators 4 hours of hands-on workshops, and then met with them and their teams to suggest ways they could begin using SharePoint."
- "Presenting at meetings and getting feedback about how others wanted to use the system. I'm thinking in particular about a wiki project where we were moving from one CMS to SharePoint. We were already using a wiki for Help-and-How-To topics for the current CMS, but what was not working was that people were still contacting the support group to make changes to the wiki when they saw that a procedure had changed or was inaccurate. We wanted to make the new wiki feel owned by all, so we wanted it to be started by all."
- "The most helpful approach we found was conducting a pilot with a specific group, and then having them share their success with the rest of the business in their own words."
- "We were responsive to user input and tried to assist in improving the system continuously—so they could continually find benefits."

Other Strategies

A variety of other strategies were mentioned in the free-text comments, including:

- Executive sponsorship and support, including getting executives to actually use SharePoint as part of their work.
- Offering coaching to intact teams, rather than one-to-one.
- Running demonstrations by internal or external parties, to show what could be done.
- Creating proof of concept examples that people could try out.
- Offering a sandbox where people could have a go at configuring a SharePoint site for a specific need, and thereby learning what could be done.
- Using a variety of training methods—such as classroom, webinars, and train the trainer—and doing so on a regular basis.

Question 7. User Adoption Strategies: Doing Differently

The final question of the survey asked respondents to comment on what they would do differently with respect to user adoption, assuming they were able to start over. Of the 185 people using SharePoint, 131 respondents shared their perspective. There were four common and recurring themes in what respondents wrote in their free-text answers:

- Develop a strategy first; don't start without knowing how you will proceed.
- Work to secure more support from executives and managers.
- Offer more effective training.
- Make use of the real-to-life scenarios strategy.

Let's look at each in turn.

Recommendation 1. Develop a Strategy First

By an overwhelming margin, the most frequent comment about doing things differently was to start with a strategy for user adoption. Respondents reflected that the actual user adoption they were getting was not in line with their hopes or expectations, and so would have done more to plan for adoption from the beginning. Sample comments were:

- “A more disciplined and more thought out approach.”
- “Be more organized in the effort and take it more seriously.”
- “Create a formal user adoption plan; offer more options for learning about SharePoint; most importantly, create an internal SharePoint users' group at the beginning of the rollout.”
- “Create a more measurable plan to assess adoption success.”
- “Create a plan.”
- “Double the funding and effort, rather than the training and communications coming haphazardly or informally. Create a more coherent message with a running theme that users can relate to and latch on to and follow. Try not to do too much at once, but keep the frequency and relevance of messages high.”
- “Get more support from executives and plan a strategy. Still have time to work this out, but need more resources both in staff and financial backing.”

- “Have a strategy. Period. :)”
- “I would plan it out more carefully. This time we were a bit ad hoc.”
- “Put a strategy in place as the starting point; do proper new starter training on our SharePoint structure rather than just say that because someone has used SharePoint before then they have blanket access; proper guidance materials, both hard copy and electronic; better use of page design to draw attention to key areas; document naming conventions; but more important than anything time to draw out real use cases and therefore build up best practice - lessons learned on an ongoing basis.”
- “Started out with a strategy - what we have done has worked fairly well having just evolved naturally, but we are in a position now where managing the demand for new features and functionality is becoming a challenge (victims of our own success I suppose!).”

Recommendation 2. More Executive and Managerial Support

The second most common refrain from survey respondents was the greater need for executive and managerial support for the rollout and implementation of SharePoint. Executive support can range from verbal encouragement (which is “good”) through to their actual use of SharePoint as part of their work (which is “great”). Executive involvement sends two critical signals:

- It gives credibility to the use of the tool. The executives were using it, so it must be credible. Survey respondents noted the power of the “If executives are using it, I should use it too” signal.
- It sends the signal that executives could learn to use the tool, and by implication, that if executives could learn to use it, then others probably could too.

Comments from respondents about executive and managerial support included:

- “Set goals, get management support, and create a need for users to use it.”
- “Get executive sponsors to use the tools and tell personal success stories.”
- “Ask for more support from Management.”
- “Get buy in from the upper level earlier, because while a grassroots strategy worked well for getting a solid base of dedicated users, our work is often flummoxed due to upper level executives reverting to old systems and email attachments.”
- “Get executive commitment, use-by-example.”
- “I would search for a strong sponsor inside my organization.”
- “More executive support. I think many saw it as a fad and just didn't connect with the business value and productivity gain potential from this technology. They saw it as just one more upgrade and a nuisance.”
- “Push for more involvement from management. Those sites that moved ahead the most were driven from the top.”

A couple of respondents noted the difficulties in securing executive and managerial support:

- “Executive support has been hard to manage and maintain as part of the process.”
- “I am a SharePoint Adoption Consultant with a background in Organizational Change, so this is my primary line of work. I use all the tools that you list in various capacities as needed to meet my clients' goals. I will continue using most of the adoption tools in my toolkit, although I find it most difficult to get executive buy-in on the importance of focusing on the soft side of technology. They are not comfortable with dealing with the

people issues and politics that must be managed in order for SharePoint to become the enterprise solution that that the executives envision.”

Recommendation 3. More Effective Training

More effective training was the third most frequent comment. This was mentioned in a variety of contexts—do more training, do more classroom training, do less classroom training, do training as part of staff induction, offer more online training, offer less online training, and more. Comments from respondents included the following:

- “Develop detailed explanations of how to set up document libraries with metadata as opposed to folders. Possibly a fleshing out of the possibilities inherent in Slide Libraries and wiki sites as well.”
- “Offer staff training sessions.”
- “Attend a class (there was no money in the training budget for this).”
- “Develop some classroom training before hand and conduct basic classes.”
- “Scripted the hands-on training better and using smaller classes. The training went well, but the classes were large (30+) and it was difficult to pace the training—even with the use of assistants.”
- “Commit more resources to face-to-face, just-in-time training.”
- “Minimize classroom training sessions.”
- “Online on-demand quick walkthroughs would have been useful, because not many staff members showed up to the classroom style training.”
- “Offer more formalized training, especially at the introductory level. Incorporate SharePoint training into all new hire training plans.”
- “We had serious problems with staff turnover where new staff were not being inducted correctly and essentially 'made it up' as they saw it, rather than the way we did it.”
- “Training delivered live—even via webinar—was perceived as a waste of time. Colleagues responded MUCH better to training 'at their own pace,' whether reading or watching on screen.”

How do we reconcile this plethora of advice, much of it conflicting? I propose two basic rules in keeping with the wider findings of this survey:

1. Offer training on the basic concepts of SharePoint. What is a document library? What is a list? What is a view? What is a site? Depending on the time pressures that people are under, and whether they learn best by listening or reading, will dictate whether they take better to a real-time training session (in a class or online), or whether they prefer to take the training at their own pace.
2. Personal attention on how to apply those basic concepts within someone’s work will be necessary. Think back to our discussion from earlier about the value of one-to-one coaching—this is where the application of basic concepts takes place.

In summary, training can be effective, but you have to do it right—and the type of users you have at your organization contextually defines “right”.

Recommendation 4. Real-to-Life Scenarios

The final recommendation involved the use of real-to-life scenarios as a user adoption strategy. A number of respondents commented on the power of these scenarios to demonstrate opportunities and help users visualize the benefits of embracing SharePoint. Comments included:

- “At first glance, the Real to Life Scenarios (already started on these, with the business case) have been hugely compelling—I work at a publishing company, so it is VERY narrative—so I will probably exploit further.”
- “Real-to-life scenarios and Exemplar stories are being developed for next phase.”
- “More user stories to focus less on SharePoint and more on how work life would be enhanced.”
- “Thought through and developed several killer applications.”

Other Recommendations

Respondents left a variety of other recommendations, just less frequently. Common groupings of other recommendations were:

- Have more resources, as in more people and money available.
- Do more engagement with users around their needs and requirements.
- Make it real for the user. Show how their work processes will be improved by using SharePoint.
- Make it easy to use SharePoint.
- Use exemplar stories as a way of demystifying the technology and how it can be used.
- Implement a governance plan for SharePoint. As discussed in chapter 4 of SharePoint Roadmap for Collaboration, user adoption is part of governing the use of the technology within a business or organizational context.
- Take a zero other options approach, where SharePoint becomes the place to work.

Conclusion

This report has provided insight into how organizations currently using SharePoint are encouraging effective adoption of SharePoint tool by their users. By analyzing the survey responses, I propose this fundamental rule: **While users have to understand the basic capabilities of SharePoint, it's the personalization and contextualization of those capabilities within their work process that is the key to user adoption.**

Thus your user adoption strategy will be most effective when you deal with both aspects:

- Implementing specific strategies that educate users on the basic capabilities of SharePoint; and
- Implementing specific strategies that demonstrate the application of the basic capabilities of SharePoint within the user's work, role and processes.

Both aspects are essential, so if you help people understand basic capabilities without the personalization and contextualization, then it is unlikely that end users will adopt SharePoint. They will hear the "what", but will not understand the "why".

In concluding this report, then, I leave you with three key recommendations:

- **Educate staff on SharePoint.** If you have a small organization, do it in person with small groups. If you have a larger organization, leverage alternative ways of delivering the fundamental education on capabilities: your own pre-recorded Web-based training, pages on the intranet, or the Web-based training material from Microsoft or other training providers.
- **Get influential people using SharePoint.** If the executives at your organization are using SharePoint, tell everyone. Better yet, get them to tell everyone. And even better still, get them to make it part of their work life, not something special or different. The executives point others in the organization to material in SharePoint. Files are stored and reviewed from there. Calendars and task lists are maintained there. Business processes happen in there.
- **Focus personal attention on applying SharePoint to work.** Regardless of the size of your organization, make a sustained effort to connect the "what" of SharePoint with the "why" of people's work. Explain the vision of how SharePoint can be used. Give scenarios from your work and processes of where it can be used. Make it the place where work happens, and remove alternatives.

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