Chapter No. 1

"Defining a SharePoint IT Strategy"
In this package, you will find:
A Biography of the authors of the book
A preview chapter from the book, Chapter NO.1 "Defining a SharePoint IT Strategy"
A synopsis of the book’s content
Information on where to buy this book

About the Authors

Peter Ward has worked with Collaboration Technology for over 20 years and is the founder of Soho Dragon Solutions, a New York-based SharePoint consultancy. He has worked with some of the largest and most profitable companies in the U.S. and also the small ones, which he calls the Fortune 5,000,000.

He has always been a software guy, but is not much of a gadgeteer. In fact, he's probably a late adopter. He teaches yoga part time in NYC. He likes to serve up the perfect vegetarian dish. He has co-authored Microsoft SharePoint 2010 End User Guide: Business Performance Enhancement and Workflow in SharePoint 2010: Real World Business Workflow Solutions.

I would like to thank my wife Peggy for being the unofficial editor of the book, even though she uses Lotus Notes at work and her company is the most anti-Microsoft company out there.

I would also like to thank the following people who assisted me with reviews and valuable input: Steve Malcolm, Ron Margalit, Jeff Gellman, Chris Geier, Jim Mc Fadden, Kanwal Khipple, and Michael Albers.

For More Information:
Pavlo Andrushkiw, MCSE, MCTS, and CTT+, has spent nearly a decade in the Microsoft space, delivering complex infrastructure solutions to a plethora of clients in various verticals. In his IT career, he has already been a Network Engineer, Systems Administrator, Web Developer/Administrator, Consultant, Trainer, Project Manager, and Infrastructure Architect. His passion and enthusiasm for properly integrating Microsoft stack products has made its way into the Amazon EC2 cloud, where he now migrates and deploys complex production environments for enterprise clients.

A special thanks to God through Whom all things are possible, to my parents for their encouragement in all my endeavors, to my beautiful wife who is pregnant with our first child and is still managing to provide unrelenting patience and support, and to my future child who is already grumbling about Microsoft licensing practices from the womb.

Paul Galvin has been working in the IT industry since 1991. He started as a staff programmer and began consulting in 1994 and never stopped. In 2008 he was awarded an MVP and in 2010 he was acknowledged to be in a group of the 50 most influential people within the SharePoint business community.

Richard Harbridge is an internationally recognized expert in Microsoft SharePoint. He has defined, architected, developed, and implemented well over a hundred SharePoint solutions from small implementations on a single server to implementations with over 80,000 users in international organizations.

He is a contributing author for the business side of NothingButSharePoint.com and is also an active facilitator for the SharePoint Business Community to enable people, groups, and organizations to work more effectively to collaborate and achieve a greater level of shared understanding around non-technical SharePoint-related challenges.

Michael Hinckley MCITP, MCTS, has been specializing in solution architecture for organizations that span from small businesses to global corporations for over 10 years. He is a recognized speaker and evangelist for Microsoft SharePoint and Business Intelligence stacks. His driving goal is to deliver successful and efficient business solutions for clients.

William Nagle is the Director of Field Operations at K2, where he helps organizations and partners realize the business value of process automation around SharePoint and other Microsoft technologies. He joined K2 after eight years of service at Microsoft Corporation where his career spanned the E-Business Server product groups including Commerce Server and BizTalk. His interest shifted towards helping companies efficiently manage business processes while working as a Senior Consultant at Microsoft Consulting Services.

For More Information:
Microsoft SharePoint for Business Executives: Q&A Handbook

The depth and breadth of the SharePoint technology can be quite daunting to any executive who is managing a SharePoint technical team, or is facing the challenge of determining the next steps with an upcoming SharePoint deployment within their organization.

This book is structured to answer those initial questions and provide you with a roadmap to understand the SharePoint technology, as well answering questions that you should be asking or will be asked by other departments' managers or an executive board.

This book will demystify the planning and managing of the SharePoint technology and you will learn how to identify and implement high business-value projects with simple, non-technical answers.

Why this book

All six authors have participated in successful SharePoint deployments within different industries and on various scales. All have witnessed train-wreck deployments that could have been avoided if, at an executive level, there was a better understanding of the application and a wider awareness of the business impact of the product, installation, and development options prior to project kick-off meetings or even determining the locations of servers.

Although some of these so called "train wreck" projects had highly technical and experienced professionals making what appeared to be logical decisions with an approach that had worked on previous non-SharePoint IT project deployments, most processes fell short because of a lack of understanding of the product deployment approaches, capabilities, technical skills required, and the reactions and responses to SharePoint deployments by the business community.

For More Information:
Going off the rails

Often businesses start off with an installation of the free SharePoint version with enthusiastic business sponsors who have visions of how SharePoint could meet their business needs. This is normally reinforced by reading the blazingly successful case studies from the Microsoft website, and by attending webinars/seminars provided by the Microsoft Partner community.

Then SharePoint goes viral. That is, employees who have used SharePoint in previous jobs start saying SharePoint can do this, that, and so on. (Note that they are not saying how it was done, and the budget and the resources that it needed.)

Fast forward three months—multiple site collections and team sites, an uninformed IT department, a stack of SharePoint books, and a lot of reactionary effort unrelated to people's jobs is spent on trying to learn a product and making it fit to a business process.

Fast forward another three months and you see disillusion among the user base, IT wondering how to get a handle on this technology, the support from users is waning, and the person who spearheaded the initial SharePoint activity over the past six months and who was leading the learning of the SharePoint technology has left and is working for someone else.

This train wreck story (yes, so early in the book) might seem a bit extreme, but it is not far from the truth, from what the authors have witnessed and is a classic case of not thinking ideas through.

William Deresiewicz, who gave a lecture to the plebe class at the United States Military Academy at West Point in October 2009 said:

*I find for myself that my first thought is never my best thought. My first thought is always someone else's; it's always what I've already heard about the subject, always the conventional wisdom. It's only by concentrating, sticking to the question, being patient, letting all the parts of my mind come into play, that I arrive at an original idea. By giving my brain a chance to make associations, draw connections, take me by surprise. And often even that idea doesn't turn out to be very good. I need time to think about it, too, to make mistakes and recognize them, to make false starts and correct them, to outlast my impulses, to defeat my desire to declare the job done and move on to the next thing.*

The moment I hear someone say they are 'Trying to do something', it normally means that they will not succeed in the task. You don't try to cross the road, you cross the road.
How this book will save you money, and, just possibly, your career

With a section header like this, it sounds too good to be true. However, if a project is not staffed correctly, implemented without a business strategy, or is misaligned with the business's strategy, problems will arise. This may sound obvious, but a .NET developer cannot start working immediately with the API without training or coaching and a .NET developer who may have technical knowledge, is not an administrator. This knowledge and insight can be key to a successful SharePoint deployment.

This is a very common mistake made by companies, including Microsoft Partners, attempting to build a SharePoint practice. This is covered in more detail in Chapter 6, How to get the .NET Developers on Board Quickly?, and Chapter 8, Managing your First SharePoint Project, of this book.

This book follows the Data, Information, Knowledge, and Wisdom (DIKW) hierarchy, where the authors have applied their wisdom to knowledge of the SharePoint technology and projects that they have participated to information and data. This is illustrated in the following figure:

The authors' SharePoint wisdom provides insight for the reader to increase their effectiveness with SharePoint decision making process.

For More Information:
Example: The .NET developer

A few years ago, one of the authors was consulting at a government department in New York and working with a newly hired CIO who asked his team to assist with their first SharePoint implementation. SharePoint had just been deployed and a few small applications were complete, and they wanted technical knowledge transfer to their .NET developer so that they could take ownership of the technology and the on-going maintenance. At this point in the deployment, there was no custom development.

He was the only resource they had and concerns over single developer/ administrator fell on deaf ears. The developer, who had no administration skills with limited SharePoint knowledge became the department's technical point of contact and product evangelist.

Prior to training, we informed the developer that he needed to read a 500-page SQL server book on SQL server and a 100-page installation manual that we had written to help him (even though SharePoint had already been installed in their environment and the developer would probably not be using this skill in the near future). After the training the developer had a lot of knowledge of the backend SharePoint technology, but little practical implementation skills of the technology.

Three months after the engagement, the author was called in by the CIO and was asked to review a project that had been deployed in the SharePoint environment.

Well, you can imagine, the developer had developed a wonderful .NET solution for the SharePoint platform. However the forms, workflows, and security features that were in the application were all custom developed and could all have been deployed out of the box in SharePoint, in probably a fraction of the time and be more easily supported (if they had someone with basic end user SharePoint knowledge).

This is unfortunate for the developer, because he was a contractor and probably felt that he had to build a solution with his skill set or he would be replaced. But you have to admire his mind set, "Don't worry, I can do it."

Shortly after this meeting, the author did hear back from the developer as he was asking about how to make the content on SharePoint externally available to users, without a VPN connection. The author was asked about his IIS (Internet Information Services) skills. There was a long pause on the phone and the sound of a few keyboard strokes; presumably a Google search occurred. His response was, "Don't worry, I can do it."

For More Information:
The CIO is no longer with this organization. This may or may not be related to this SharePoint project. You can only speculate.

This experience is personally frustrating to witness because it impacted careers and undermines the reputation that SharePoint can add real business value to an organization. So if situations like this can be avoided, it is a winner for everyone.

How to use this book

Our advice is simple. Read the book from cover to cover. It should be a quick read. Please feel free to make notes of the functions and any familiar process takeaways, and use post-it notes to label important techniques to which you want to refer. In fact, mark it up with a pen and think about how to apply the answers to an upcoming SharePoint initiative, where to do some further research on a topic, or discuss with other co-workers and team members to share and exchange ideas.

This book is designed to be a primer to understanding the SharePoint technology and how to deploy and support it and not to be an endpoint to your SharePoint learning process.

What This Book Covers

Chapter 1, Defining a SharePoint IT Strategy, outlines the first broad process of solving business problems with the SharePoint technology and to fully understand the magnitude of the business issues.

Chapter 2, Just Enough Governance, bridges the gap between the uncontrolled environment so often seen with a SharePoint environment, and the approval and documentation-heavy processes you see in other business areas. It introduces the topic of governance in such a way that most business executives and IT leadership understand inform the readers that SharePoint can be governed just like every other platform.

Chapter 3, Deployment Roadmap, gives readers the appropriate introductory knowledge to aid them in deciding how to go about installing or upgrading SharePoint within their organizations. With a myriad of available versions and deployment options including on-premise, hosted, and cloud-based, business executives need to know what their options are, what their concerns should be, and what criteria to use to best choose the optimal venue for their SharePoint deployment.

Chapter 4, SharePoint in the Clouds, addresses important considerations for cloud-based SharePoint deployments, with a focus on Office 365 (Microsoft's premier offering) and Amazon EC2, the largest available public/private cloud. As cloud technologies mature, they are becoming more attractive to organizations for production use, and IT management needs to know the benefits and pitfalls of what the cloud can do for SharePoint.

For More Information:
Chapter 5, *SharePoint and Important Trends*, outlines IT trends that affect a SharePoint deployment in your company and educates the reader that SharePoint is not a simple application. It's an enterprise platform that is used in many different disciplines, industries, and corporate cultures. In this chapter, we explore how SharePoint is being used and leveraged within vertical markets and horizontal markets. In order to effectively determine how to invest in your SharePoint implementation, it's important to understand Microsoft's positioning, the vendor marketplace, SharePoint's competitors, and industry trends that will impact your SharePoint investments.

Chapter 6, *How to get the .NET Developers on Board Quickly?*, provides an approach to bring .NET developers up to speed quickly and avoid the pitfalls many other organizations have inadvertently stumbled over in the last few years. Microsoft will be the first to tell you that SharePoint is itself a .NET platform. It follows that since .NET is a mature and widely adopted technology, you'll have a rich and deep market of resources from which you can draw highly skilled SharePoint developers with minimum effort. Similarly, you may reasonably believe the same of your existing, .NET-skilled IT staff. However, you'll also quickly find that SharePoint requires your development team to acquire a fair amount of specialized knowledge.

Chapter 7, *Growing SharePoint Capacity and Meeting Staffing Resource Needs*, delves into what skill sets are required for SharePoint implementations, how to evaluate what your real staffing needs are, how to leverage existing resources more effectively within the organization, and how to evaluate external experts/consultants to augment your organization's capabilities. As SharePoint implementations grow and become more successful within your organization, how do you handle managing, evaluating, and acquiring the necessary talent to keep it going?

Chapter 8, *Managing your First SharePoint Project*, discusses criteria for selecting that "first" project, pitfalls to avoid, and best practices to follow to ensure that it's both a successful project and a template and shining example that will help your organization move forward with confidence and success with SharePoint. Many companies' first SharePoint projects fail to meet the business requirements that justified their investment in the first place, let alone provide lasting value down the road. That's a shame because it does not need to, and should not, turn out that way.

For More Information:
Defining a SharePoint IT Strategy

Your organization is considering whether to install SharePoint, and you are now envisioning what it can do for your company. But you also need to consider costs versus benefits, keeping in mind your company's directive of "being more strategic with IT spending". The time has come for your team to clearly define an IT strategy to guide your upcoming SharePoint deployment.

This chapter outlines a series of simple, common-sense steps to help define and implement a strategy that is aligned with the business, while simultaneously not being a huge distraction to operational work. This presents a different approach to typical "strategy sessions" which generally lead to a long-winded document, rife with complex diagrams, impressive-sounding technologies, and perhaps even some Excel clippings (with financial machinations in an attempt to give the whole thing an air of business legitimacy).

Q: Can you define what a strategy is?
A: A strategy is a plan of action designed to achieve a specific, long-term goal or result. This plan of action has explicit methods and maneuvers designed to accomplish pre-defined goals, but it can also be steered to perhaps achieve a level of differentiation against the competition, or to gain a competitive advantage. A strategy can also be implemented to guide and drive the overall aim of an organization.

The time dimension of a strategy should be subdivided into definable milestones and should include employees, shareholders, vendors, and customers. Obviously, timeframes will vary by organization and project type.

For More Information:
Defining a SharePoint IT Strategy

Strategies, however, are not tactical plans detailing the technical implementation of a technology your company is interested in. If your "strategy document" mentions IP addresses, networking equipment, or server farms, it’s likely that your original initiative has mutated. Strategies are usually defined by senior management who do not want to be bogged down with technical details; developers and administrators generally dislike and don’t participate in long strategy sessions.

A strategy could even be considered proactive observation: gathering information on the activities of specific departments, the company as a whole, the marketplace, the competition, and making decisions based on an analysis of this data.

Q: What is an IT strategy?

A: An IT strategy is a plan to achieve specific IT goals and results. In short, it is a roadmap of what, when, and why, regarding the IT ideas/initiatives that have been agreed on between the business users and IT department.

These goals should be defined by both the business and IT department. They need to balance competing objectives from multiple departments, take into consideration the breadth of the goals, prioritize them, and reclassify accordingly.

Who makes the ultimate decision on the prioritization depends on the organization’s structure and internal politics. If the CTO/CIO report to the CFO, then the priorities tend to swing towards reducing costs. If the reporting structure is to the CEO, then the priorities reflect company growth. Additional priorities that may overlap into an IT strategy include marketing and brand recognition of the organization.

An IT strategy is a journey which leads to a series of milestones, perhaps defined and redefined quarterly, annually, or every five years (yes this is a long term in IT). These milestones should be shared among all senior management, employees, and contractors involved in the projects.

For More Information:
It is not a single meeting and a series of PowerPoint slides to impress management that are then e-mailed to a group.

Someone senior within the organization must be accountable for the process.

For the purpose of this chapter, typical strategies could be aligned with your organizational goal, along with the assumption that most of the IT goals aid business operations.

These goals are stated in two lists as follows. The first is business-centric, whereas the second set is more IT-centric. It is how an IT strategy should be defined and implemented:

- Improve decision making
- Improve compliance for accurate records/policies for future access
- Reduce overall manpower requirements by improving efficiency
- Reduce overall risk

Other examples of goals, which could also be classified as objectives or subgoals, may include the following:

- Enable wide adoption of application
- Invest in platforms that are easier to maintain
- Reduce overall maintenance costs

Both sets of goals are equally important not just in what is actually being delivered but also in the timing of each goal.

The most important goal is not that the SharePoint application was delivered on time, but that a user adoption level was reached at a certain point. This is a key issue with SharePoint applications.

For More Information:
The following figure illustrates a deployment using the strategic approach. The strategy is split into definable phases and goals with a defined end date. Notice how some of the activities (Projects, Adoption, Organization, IT, and Infrastructure) of the phases are split between business and IT initiatives.

<table>
<thead>
<tr>
<th>Phase</th>
<th>Projects</th>
<th>Adoption</th>
<th>Organization</th>
<th>IT</th>
<th>Infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Intranet migration</td>
<td>Training: Essentials I</td>
<td>Existing business units</td>
<td>Deploy support and helpdesk plan</td>
<td>Configure, custom and third-party web parts</td>
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<td></td>
<td>Asset library</td>
<td>Essentials II</td>
<td>Market data</td>
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<td>Health check</td>
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<td></td>
<td>Project Man, Workbench</td>
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<td>Asia PAC</td>
<td></td>
<td>Production</td>
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<td>My sites</td>
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<td>Governance plan</td>
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<tr>
<td>II</td>
<td>Intranet - Workflows</td>
<td>Training: Essentials I</td>
<td>Develop awareness of SharePoint</td>
<td></td>
<td>Configure, custom third-party web parts &amp; .Net</td>
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<td></td>
<td>InfoPath forms</td>
<td>Essentials II</td>
<td></td>
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<td>Dev. Env.</td>
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<td>SP Designer</td>
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<td></td>
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<td>InfoPath</td>
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<td></td>
<td></td>
<td>BI</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>III</td>
<td>Further engage business units to identify business impact of the SharePoint platform to their business operations</td>
<td>Training: Essentials I</td>
<td>Migrate all overseas instances to single SharePoint deployment</td>
<td></td>
<td>Configure, custom third-party web parts &amp; .Net</td>
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<td></td>
<td></td>
<td>Essentials II</td>
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<td>BI</td>
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Some of the goals are continuous to the endpoint of May 2013 as illustrated. Of course, additional phases can be added to the IT strategy.

It is recommended that, at the end of each phase, a meeting should be held among IT personnel and the business to discuss the phase that has ended, identify successes, failures, and how improvements can be made for the next phase. This post mortem review process should be documented, and applied to the next steps.

For More Information:
Q: How do you create a SharePoint IT strategy?

A: The business and IT department need to meet and discuss objectives and capabilities. This will take more than an hour. Depending on how large the organization is, the strategy meeting would take at least a day, perhaps two and it would be beneficial to have an outside person with SharePoint expertise facilitate the discussions.

Before embarking on an IT strategy specific to SharePoint, it would be a good idea to understand the capabilities of this technology. Before scheduling any strategy meetings, it's important to understand, at least at a high level, the value that SharePoint brings to an organization, what it takes to achieve this value in terms of time, money, and resources, and also what SharePoint will not solve or fix (such as bad business methodologies).

A typical strategy workshop should cover the following agenda:

**Day 1: Diagnostics**
Typical agenda for the day would be:

**Intro to workshop—discussion**
It will cover the following points:

- Introductions and objectives
- Workshop methodology

**Company background—discussion**
It will cover the following points:

- Company size and background.
- Business drivers—people, processes, and business.
- Imperatives and priorities.
- How is IT challenged? Are there legal implications and would the legal department need to be involved?
Defining a SharePoint IT Strategy

The Focus on IT environment—discussion
It will cover the following points:

- IT roles
- Projects/initiatives and applications
- Dependencies — costs, resources, services, and service levels
- IT Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis
- Current SharePoint deployment (if this exists)

Current IT core applications—discussion
This discussion will cover the following points:

- Overview
- Availability
- Performance
- Security
- Compliance
- Mobility
- Application categories
- Ownership and control

Future IT core applications—discussion
The following points will be covered:

- Projects/initiatives and applications
- Cloud
- Third parties
- Application categories
- IT priorities
- Risks — security, compliance, performance, availability
- Overall profile

For More Information:
Review—discussion
At the end of the day, the workshop facilitator should write up notes for the next day. This process is similar to an ill patient visiting a doctor (Day 1) and the doctor presenting a treatment plan to the patient (Day 2).

Day 1 complete at 5:00 p.m.

Day 2: The treatment plan
Typical agenda for the day would be:

Initial findings and review—discussion
It will cover the following points:

- Application categories
- Overall profile
- Priorities risk register (SMART)
- SharePoint match
- Impact assessment
- Ownership and control
- External considerations

The Gap analysis
Gap analysis will cover:

- Technology
- People
- Processes

Priorities, actions, and agreement
It will cover:

- Risks
- Budget
- Adoption—IT, users, and business units

For More Information:
Defining a SharePoint IT Strategy

- Political wins
- Mapping SharePoint to business needs
- Third-party tools and customization

**Review—discussion**

The review covers:

- Maximizing impact (cost versus value versus number of people impacted)

Day 2 complete at 5:00 p.m.

During day 2, the group will identify in-scope applications that could be moved to the SharePoint platform, or determine whether to build them or not. This is logged on the priorities register.

During these two days, discussions and actions occur. If decisions cannot be made during these days, they need to be made shortly after this strategy session. If this is a large company, maybe extra days are required.

The result of this could be:

<table>
<thead>
<tr>
<th>Application categories - HR</th>
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<tbody>
<tr>
<td><strong>Functionality</strong></td>
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<tr>
<td>Expense System</td>
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<tr>
<td>Knowledge base</td>
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<tr>
<td>Timesheet</td>
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<tr>
<td>On boarding</td>
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<tr>
<td>Policy Document Review</td>
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<tr>
<td>Performance Management</td>
</tr>
<tr>
<td>Skill set finder</td>
</tr>
<tr>
<td>PDF forms on intranet</td>
</tr>
</tbody>
</table>

**Bold** - functionality that will not be replicated in SharePoint

For More Information:

The results of the ranking of the priority register is illustrated in the previous figure and the methodology of the business impact ranking process is illustrated as follows:

**Day 3: A successful SharePoint implementation plan**

Typical agenda for the day would be:

**Next steps—discussion**

It will cover:

- Strategy plan (strategy deployment approach figure)
- Table of actions

**Summary and close out**

The following points will be covered:

- Overall findings
- Outputs
- Action plan for 90-day actions

Day 3 complete at 4:00 p.m.

For More Information:
Defining a SharePoint IT Strategy

Your SharePoint IT strategy will also need to work in tandem with other existing IT strategies and resources, so it is important that they are synchronized with this strategy session. In addition, the strategy should be shared with other groups within the business such as infrastructure, sales, and marketing, such that they are on the same page in understanding the requirements and potential competing resources.

Q: What is the intended outcome of the workshop?

A: This workshop's findings will need to be discussed with other senior management to determine who will be the ultimate budget and resource approvers. For post-workshop conversations, the deployment roadmap approach figure at the beginning of the chapter provides a visual description of the roadmap for management's understanding, as well as a Gap Analysis. This tool identifies where your organization currently is with its SharePoint deployment, and defined future steps. The following figure is a typical Gap Analysis that shows the current and future states that relate to the organization's technology, people, and processes. It asks two core questions: "Where are we?" and "Where do we want to be?" By asking these questions, management has the opportunity to allocate resources to projects and initiatives, and to identify the gaps between goals and resource allocations.

This tool does involve determining, documenting, and approving the variance between business requirements and current capabilities.

If you wish, the Gap Analysis tool can be used to benchmark your goals with other companies and other assessments. Once the general expectation of performance in the industry is understood, it is possible to compare that expectation with the company's current level of performance.

For More Information:
Another post-workshop tool is a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats). The following figure is a SWOT analysis diagram that identifies the four components of the analysis:

Management often loves these figures because they are good talking points for members of the workshop and are definable and actionable for the teams.

For More Information:
Q: Who needs to be involved with the process?

A: A variety of organizational personnel will be involved in the development, execution, and analysis of any IT strategy at different times.

The key to success is the input from IT and business management who have the ability and authority to assign resources to the project, and to authorize business initiatives as they relate to SharePoint.

Because a strategy is not a single project, there generally is not a single business sponsor, but rather senior members from both the IT and business sides of the organization. To increase the chances of success, these individuals should be involved from the beginning of the strategy defining process. The business sponsor is responsible for communicating the overall objectives they seek to accomplish with the assistance of IT. During this dialogue, the IT sponsor is responsible for understanding the high-level feasibility and risk as well as the desired functionality; this is the Risk Registry. Once these items are understood, the IT sponsor will need to come back with the proposed IT strategy to meet these goals. It is the IT sponsor’s responsibility to understand the resources required to ensure successful execution of the IT strategy. Initial resources to consider may include IT personnel, operational personnel, and helpdesk personnel.

Your advocates may come from various disciplines. A good place to start would be the management teams of those individuals most likely to benefit from the prioritized list. However, do not forget resources that help to drive the adoption and solicit feedback once your solution is live.

If you work in the IT department, you may witness continuous requests for IT resources or initiatives with the SharePoint platform for business users. This is good, because they see you or your department as a strategic asset that can help them solve problems. If this is the case, then some of these requestors should attend the SharePoint workshop or at least see the post-workshop findings.

If you work in the IT department and the business community in your organization does not make requests, then there is a chance your department is not viewed as a strategic asset and you may be even viewed as an operational cost. If this is the case, the workshop is an opportunity to bring perceived value to the business.
Funny you should say that...

Up to this part of the chapter the reader has been introduced to a process of how to define an IT strategy for SharePoint for their business. This section of the chapter answers questions that the reader may now have about how to apply knowledge from this chapter to their organization.

**Q: Do I need to get the CEO involved?**

**A:** A typical IT strategy does not require the CEO's hands-on involvement. However, an IT strategy, at the end of the day, truly serves only the corporate strategy.

Ultimately, there is really only one true strategic player in the organization: the CEO and his or her counterparts on the board. All the other officers of the corporation must use their respective departments to help the CEO execute the company's strategy. Most business units align their activities to the corporate strategy and similarly, IT must wrap its strategy around the business's.

Therefore, by all means, share your finding with the CEO to demonstrate that your department is supporting the corporate strategy. Most CEOs care about dominating a market or increasing sales and not necessarily whether or not you have a deployment plan for any product. So the last thing you really want is a non-technical person being very influential with an IT strategy that they don't understand.

**Q: Why is a SharePoint strategy different than other IT products?**

**A:** It is because SharePoint is a platform. It can be difficult to define the functionality that has or could have been deployed to the business, so the milestones/endpoints are different than those for a typical application such as a CRM system.

Also for a SharePoint strategy to become a deployment reality, there are several dependent technologies that SharePoint relies on, which need to be in place and set up correctly for the initiatives to work. For example, user profile synchronization needs to be configured appropriately with Active Directory in order for the organization chart in My Sites to work.

For More Information:
Defining a SharePoint IT Strategy

An application is like Microsoft Word, a program that is very clearly defined for the single purpose of writing documentation. As stated many times in this book, SharePoint is a platform for web applications to be developed on.

This is why SharePoint can be difficult to define and describe to people. Another term you will hear is that it is the Swiss Army knife of Microsoft's web offerings, because the tool has many blades.

Microsoft will often explain SharePoint with the pin wheel, which is illustrated as follows:

![SharePoint Pin Wheel Diagram]

Given SharePoint's broad functionality and its potential to be used by any employee in an organization, defining a strategy can be a challenge. This is unlike a Customer Relationship application where generally only the sales and marketing departments are involved and processes are already defined.

Another reason why defining a SharePoint strategy is unique is because employees may have had an experience with SharePoint at a previous job, and want to repeat this experience again. What they often do not realize is that their previous experience may have consisted of a customized SharePoint environment, or one augmented with third-party components. These employees end up surprised and disappointed when their expectations don't comply with the current deployment.

It is essential to educate the user community about SharePoint if you really want to leverage it's functionality. It is important to gauge the level of interest and time that business users have and are willing to spend on SharePoint awareness.

For More Information:
Q: What are the pitfalls of a SharePoint strategy?

A: The biggest pitfall would be to neglect involvement of the business in forming an IT business strategy.

If IT attempts to create its own "strategy" centered on technology, there will be a problem. A division between IT and the rest of the organization will increase as most other business units have aligned their activities to the corporate strategy.

The name of the game is for an IT strategy to support the corporate strategy.

It's a bit like the used car salesman trying to peddle the high-margin two-seater sports car on the lot, despite the fact that the customer explicitly mentions a wife, three kids, and the 80-pound family dog. The salesperson may have a deep mastery of the technical and aesthetic attributes of the sports car, but his "strategy" is at odds with the customer, no matter how knowledgeable he is about the product or how it could be applied to the customer's problem.

As a technologist and business person, you can avoid these pitfalls by marrying technologies with the corporate strategy and keeping in mind that a successfully executed strategic objective is more important than the tools used to get there. Yes, this may mean that .NET development may have to wait. This mindset adds a healthy dose of pragmatism to IT and aligns IT with the rest of the organization and brings a results-oriented focus to IT.

Rather than cooking up ROI numbers, or attempting to assign a "business benefit" to the cost of sending a single e-mail, this mindset puts IT in the business strategy and produces or enables business results and can be seen as a true business partner.

Thus you can begin to see that business involvement is crucial for validation of goal, approach, and partnership during the development and go-live phases. Once the business is involved, you can set a path for success and most of the remaining pitfalls can be avoided with effective project management.

Planning pitfalls may include aspects such as failing to schedule well-defined project milestones. Specific to IT planning, having the right skill sets in place is critical. This is where experience and up-to-date training will pay dividends. Take time to identify gaps in knowledge or experience. As long as the void in skills is identified, you can plan around it with a combination of training and outsourcing. Otherwise, you risk embarking on a very expensive training exercise and possible project failure.

For More Information:
"Scope creep" is another common pitfall when dealing with IT projects. It's common to come up with additional ideas on how IT technology can be applied. The challenge will be to decide how to track and accommodate requests for changes in scope. As project budgets and timelines are established at the beginning of the project, it is important to incorporate a methodology on how to respond to scope changes up front as well.

Knowing how to say no or when to push back is a great trait to avoid this pitfall. Having too rich a functional goal mixed with a delivery timeline that is too ambitious will set you up for falling far short of expectations. By keeping business values top of your mind, you will be able to make the right trade-off in this area.

Another common pitfall with an IT strategy is failing to properly accommodate for dependencies. These dependencies vary from needed resources (hardware, personnel) to availability of system interaction (parallel IT projects, test data, migration windows of opportunity, and so on). As is the case with skill sets, take time at the commencement of the project and strategic milestones to check your dependencies and have a contingency plan where needed. Of course this does not help when a five-year strategy is at the mercy of the yearly budget review.

Adoption is also often overlooked while considering IT business strategy because it is easy for IT personnel to neglect adoption. This is because they will undoubtedly know more on how to use the system or application because they built it and they may fall in love with their own project while forgetting to put themselves in the shoes of the end user and business management. IT adoption can be aided with a mix of proper training, evangelizing, and desire to understand the business.

Lastly, it is important to remember that an IT business strategy is more of a journey than a destination. Just as business needs evolve, the technology that we can apply to aiding the business seems to evolve even quicker. With this in mind, your knowledge of the IT world should always be growing and your methodologies should constantly be refreshed.

Q: Why do we really need an IT strategy?
A: In short, the strategy will help prioritize IT efforts to support the business requests. The key aspect of an IT strategy is to manage expectations of both the business and IT department so that both parties know what to expect and when.

In the first figure of the chapter, there is a clear roadmap of SharePoint deliverables for the business so budgets can be defined and resources allocated. The details of how this is done do not necessarily need to be agreed upon in the strategy meeting. In fact, given that the budget is not defined at the workshop, some initiatives may not be feasible.
By having an IT strategy for SharePoint, return on investment can be identified with some effort and initiatives being approved and prioritized.

Without a strategy, there is normally a passive approach to a SharePoint deployment, where initiatives are not coordinated among departments and low value processes are used with SharePoint, such as fancier and more expensive set of shared drives rather than a usable ECM system with findable information assets.

Research by AIIM stated that half of SharePoint implementations proceed without a clear business case (which shows lack of direction from the start); only 22 percent of the organizations provide users with any guidance on corporate classification and use of content types and columns; one third of the organizations have no plans as to how to use SharePoint, while one fourth of the organizations say IT is driving it with no input from information management professionals.

Digging deeper
This section of the chapter outlines areas of an IT strategy that the reader may wish to know more about.

Q: Any final words of advice on this?
A: Rushing off to "the next big thing" after completing a phase or a project of the first phase of the strategy road map is a bad idea. But even in the most successful projects, there are usually items still remaining. Additionally, after a few weeks or months "in the wild," the people using the fruits of your labor may have some great and often simple-to-implement ideas for improvement. However, the project is complete, deployed to the specified scope, and your resources are working on another project.

This problem often happens with SharePoint projects, when phase II functionality is urgently required to meet business expectations and perhaps prevent an initiative stalling, yet the additional resources and perhaps an already large investment of time and money is allocated to other projects.

This is typical of SharePoint projects partly because the end user actually knows what they really want, once they realize that they have to use SharePoint and experience what they requested.

In short, a small additional effort can have dramatic effects, accelerating and amplifying results. Therefore, you may want to factor in a six-month revisit on projects and should not be afraid to move projects out of phases, or even eliminate them if the business value will be trumped by a phase II project.

For More Information:  
Defining a SharePoint IT Strategy

Often IT will say to the business this is the initial foundation for future growth, but if you allow the project team, momentum, and leadership to scatter, never to return again, the effort and time of building that complex foundation is reduced to nothing. SharePoint deployments like other deployments require a support team.

Summary

In this chapter you have been guided on how to create a SharePoint strategy for your organization, and been shown the information and actions that are produced after the strategy workshop.

The strategy challenges and pitfalls were also explained.

This is the first chapter of the book and has given the reader the knowledge to begin to explore SharePoint deployments within an organization. We recommend that you review this chapter again once you have read all the other chapters of the book so you are fully aware of the deployment strategies, and what is needed to staff your resources and build capacity, and ultimately have a successful SharePoint deployment that delivers business results.

For More Information:

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