Total Solutions

SHAREPOINT GOVERNANCE DRIVING ADOPTION

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RESULTS

According to a 2015 AIIM (Association for Information and Image Management) report:

The project has not been a success, 7%
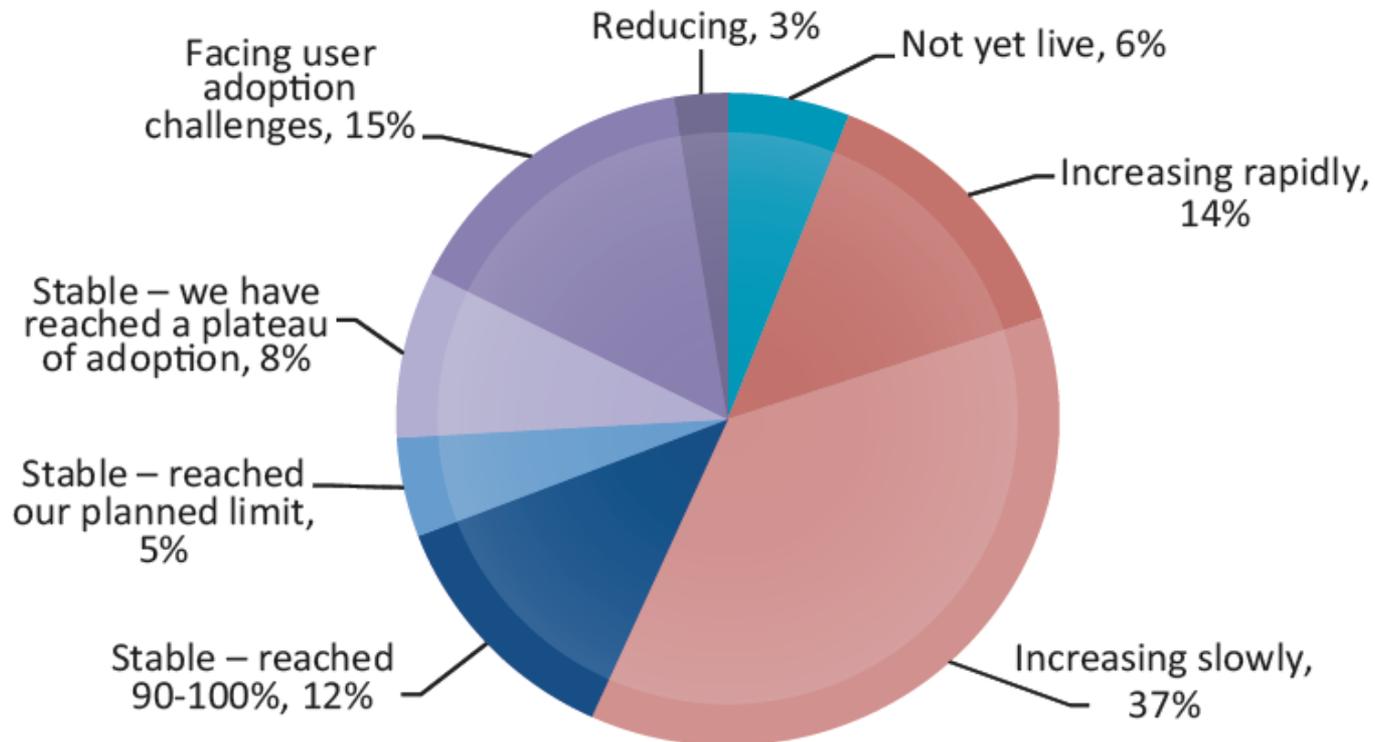
We have achieved all we planned and it is a success, 11%

We have struggled to meet our original expectations, 30%

Just about there as planned and moving forward, 26%

It's doing the job but progress has stalled somewhat, 26%
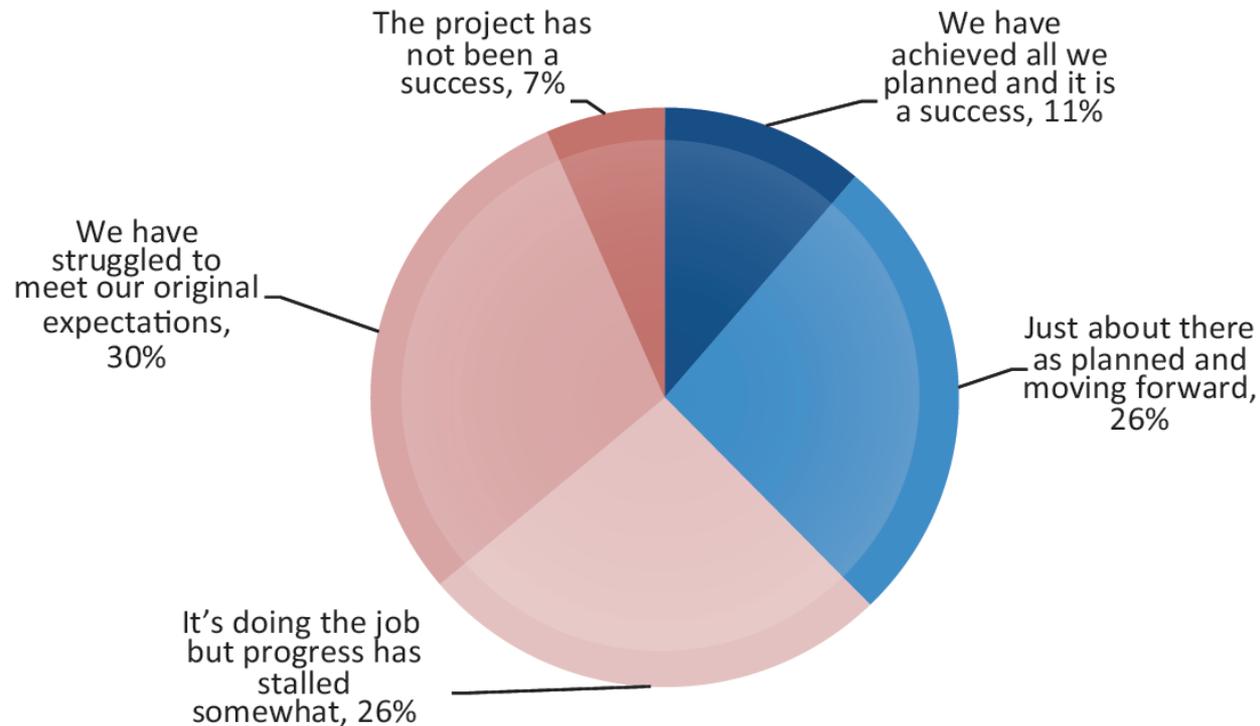
Source: AIIM 2015 Report

RESULTS

Also according to the 2015 AIIM report:

Pie chart showing:
- Reducing, 3%
- Not yet live, 6%
- Increasing rapidly, 14%
- Increasing slowly, 37%
- Stable – reached 90-100%, 12%
- Stable – reached our planned limit, 5%
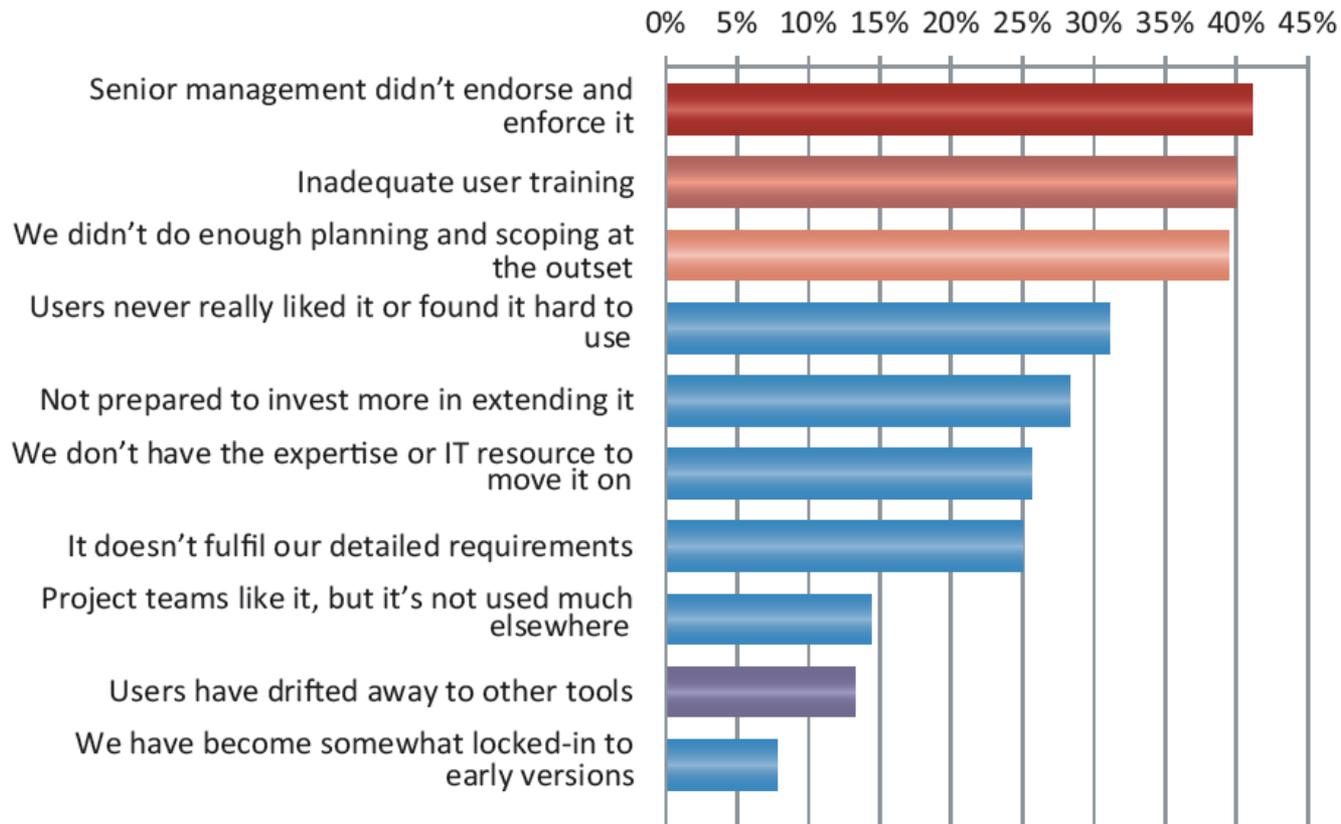- Stable – we have reached a plateau of adoption, 8%
- Facing user adoption challenges, 15%

Source: AIIM 2015 Report

WHY?

Also according to the 2015 AIIM report:

Source: AIIM 2015 Report

WHAT IS GOVERNANCE?

Source: Technical Diagrams for SharePoint 2013

WHAT IS GOVERNANCE?

Governance means different things to different people.

- IT
  - Controlling who has access to what
  - Controlling what functions are available and to whom
  - Managing how an environment grows or shrinks (is provisioned or de-provisioned).

- Legal & HR
  - Making sure that sensitive data is secure

Who else?

WHAT IS GOVERNANCE?

- Accounting
  - Keeping track of how much revenue is spent or generated

- Finance
  - Controlling what is spent and on what

- Management
  - How to measure the success (or failure) of the initiatives you're responsible for

- Executives
  - Where the organization is, where it's going, what are its priorities, and how well is it progressing along the path?

- Everyone
  - How content is categorized, organized, managed, and found!

GOVERNANCE

Where you have been

Where you are

Where you are going

SUCCESSFUL GOVERNANCE

Rule #1: Successful governance is **driven by the business.**

To get to where you're going, you **must** have governance:

- To prioritize the business needs

- To drive user adoption of the tools

- To control and manage the growth and change of the information

How?

KEY ELEMENTS

Governance is specific to your organization.

To answer the one "H" question, we can answer the standard five W's for your organization:

GOVERNANCE – WHO?

Rule #2: Governance **must** be done by a team

Who should "do" governance within an organization?

- Technically, everyone contributes.

- Members should range across all parts of business
  - At least everyone who is affected by SharePoint

- Must have a champion in the executive / C-suite
  - Someone who can make the tough choices about which business issues get priority!

GOVERNANCE – WHAT?

What is the governance group responsible for?

Easy!

Creating the governance plan:

- What are the priority issues facing the business?

- How do we solve them?

- What do people need to use the new solutions?

- How do we make sure people are using the right tools?

The answers become your governance plan…

…more on that later!

GOVERNANCE – WHEN?

Start governance **before** you roll out the technology!

If you've already rolled it out, start introducing governance as soon as you can.

When does the governance group meet?

- In the beginning, early and often.

- After that, regularly, but with less frequency.

- …until the next SharePoint upgrade…
  - Note: in Office 365, you'll need to meet regularly at least to review the Office 365 roadmap, and how it will affect your organization.

Rule #3: Meetings should be public whenever possible, and **must** be communicated well in advance.

GOVERNANCE – WHERE?

It's a collaboration platform…work anywhere! ☺

Oh, you mean "Where does governance happen?"

- Of course, in the governance group

- But also in all the business units we've defined so far…

GOVERNANCE – WHY?

Why do governance at all?

Only do governance if you want to have a successful implementation!

- Per Eric Riz, successful means, "you've transformed your business so that people use SharePoint to complete their daily tasks"

- The group must decide priorities for the business first to guide the SharePoint implementation

Rule #4: To be successful, governance needs an active participating governance group and a built-in feedback loop.

GOVERNANCE – HOW?

Based on your priorities, you start by laying the foundation to build the solutions that will solve these prioritized problems.

(You did set these priorities, didn't you?)

Laying the foundation might involve:

- Technical solution(s)

- Policies and procedures to support the solution(s)

- Changes in business practices
  - New ways of thinking and working

GOVERNANCE – HOW? (CONTINUED)

The answer to "How?" almost always involves:

- Training, training, and more training – around the changes in the business, software, and processes

- Communication, across all levels, often, and repeated
  - What you're doing / offering / changing
  - When the solution will be available
  - How you use it

Did I mention training and communication?

GOVERNANCE PLAN

What is that again?

Let's talk a little more in depth about the governance plan

- It's a map, and eventually a route, continuously updated

- The governance group uses the map to make sure they're going in the right direction

- It's not complete when you start…nor is it **ever** complete

- It should draw a picture of your SharePoint implementation - and how it will change - over time

- It should be transparent
  - Everyone should be able to see the plan and at the very least give feedback.

GOVERNANCE GROUP - AGENDA

Sample ongoing agenda:

- What does the business need next? What are the next priorities?

- What needs to be rolled out next to whom? Who will do the work?

- Who will communicate and what do you need to create buy-in?

- In what ways will we offer training and guidance?

- Do we have supporting policies and procedures? If not, who creates them?

- Who is now responsible for what is being rolled out in SharePoint? After the rollout?

- Do we need to make changes to the:
  - Taxonomy
  - Information Governance
  - Permissions

- Who will communicate what's happening and what's now available to the organization?

GOVERNANCE PLAN – HOW?

How do we make a map?

WHAT NOW, BWANA?

By now, you've realized that the map **and** the journey are different for everyone.

You've also realized that the map is never complete, and for much of this journey, you really need an experienced guide.

There are several resources in the last slides to help you with directions…

…but the best guide is always one who has made the journey before you.

GOVERNANCE NAMES TO KNOW

- Susan Hanley - http://www.susanhanley.com

- Eric Riz - http://www.ericriz.com/

- Benjamin Niaulin - https://bniaulin.wordpress.com/

RESOURCES

- AIIM 2015 Report

- Microsoft Ignite 2015 - A strategic and Pragmatic Conversation on Governance – Eric Riz

- Strategies for SharePoint – Eric Riz

- Office 365 Customer Success Center - User Adoption

- SharePoint Governance – Guides, Links and Downloads

- SharePoint Governance – Benjamin Niaulin

- Governance Policy and Guideline Questions – Susan Hanley

- Susan Hanley's White Papers

- Essential SharePoint 2013 Appendix

GOVERNANCE

Where you have been

Where you are

Where you are going