

The logo for Total Solutions features the word "Total" in white with an orange '@' symbol, and "Solutions" in white with a blue '@' symbol. The background is a complex geometric pattern of triangles in various shades of blue, brown, and grey.

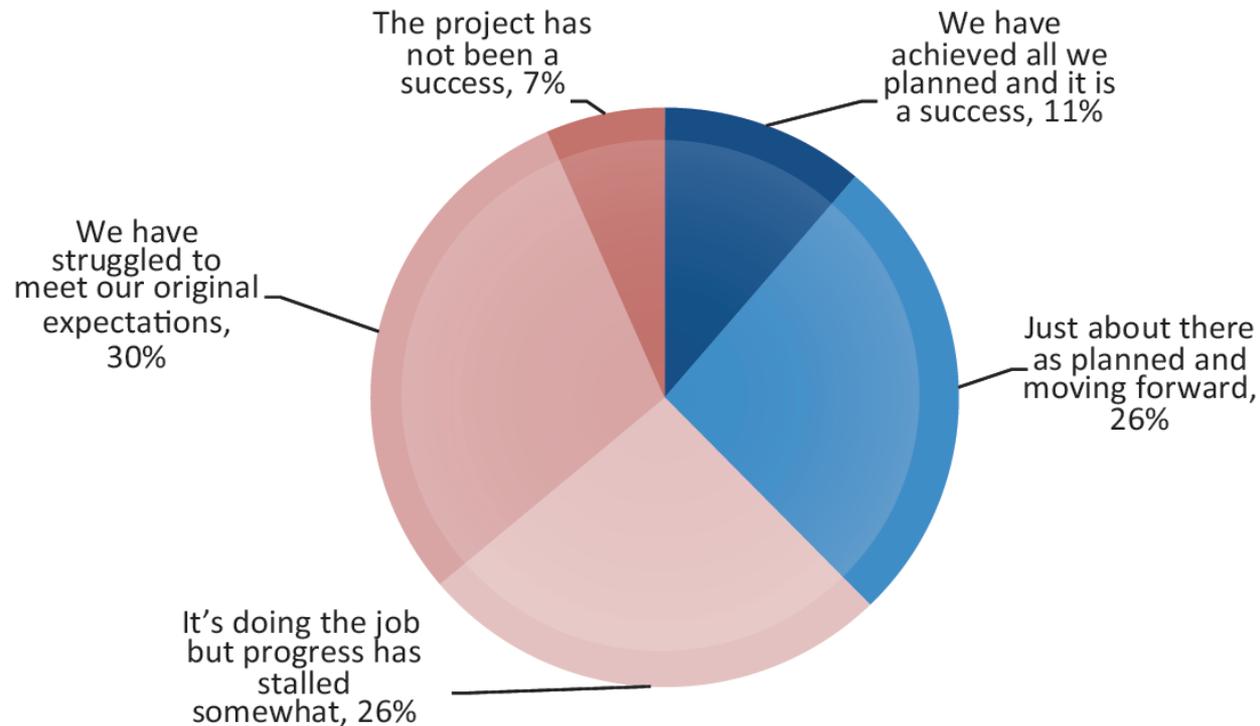
# Total Solutions

**SHAREPOINT GOVERNANCE  
DRIVING ADOPTION**

BJ Walraven  
[bwalraven@totalsol.com](mailto:bwalraven@totalsol.com)

# RESULTS

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

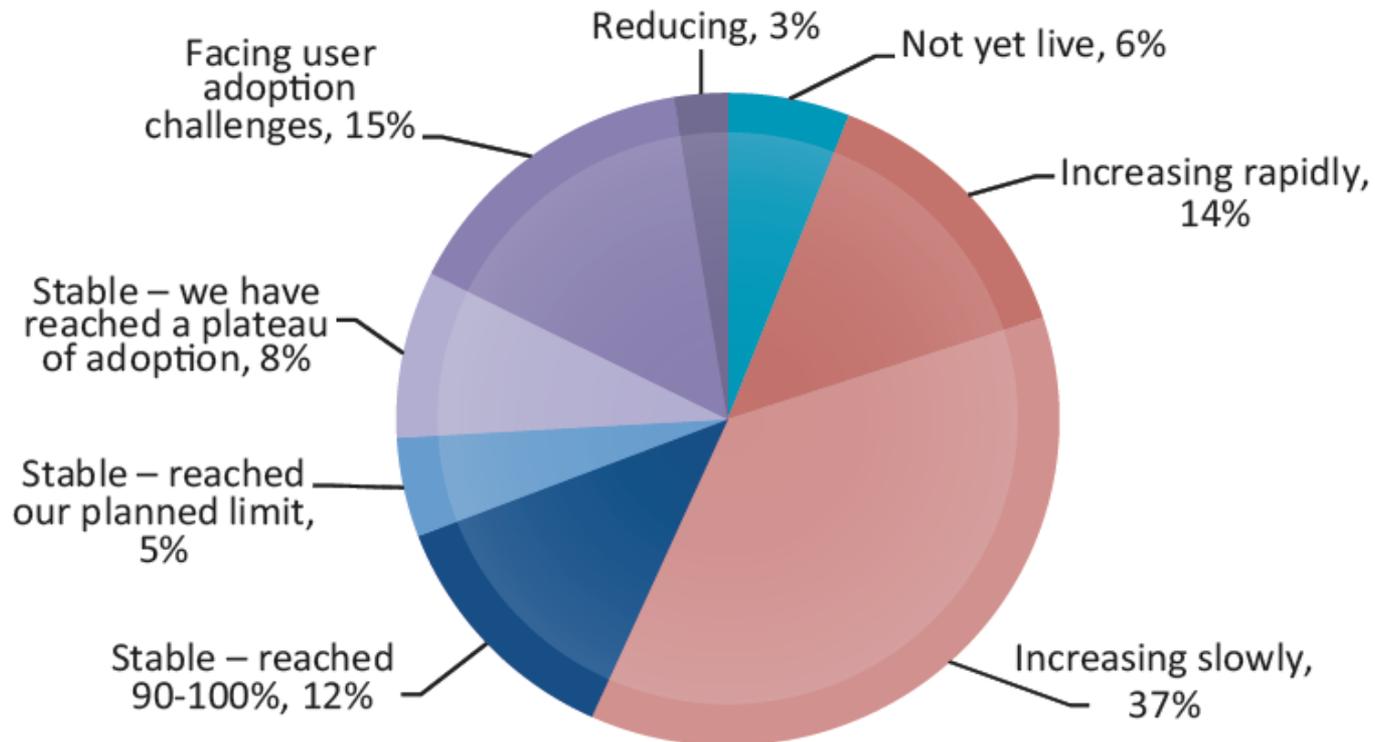


Source: [AIMM 2015 Report](#)



# RESULTS

Also according to the 2015 AllM report:

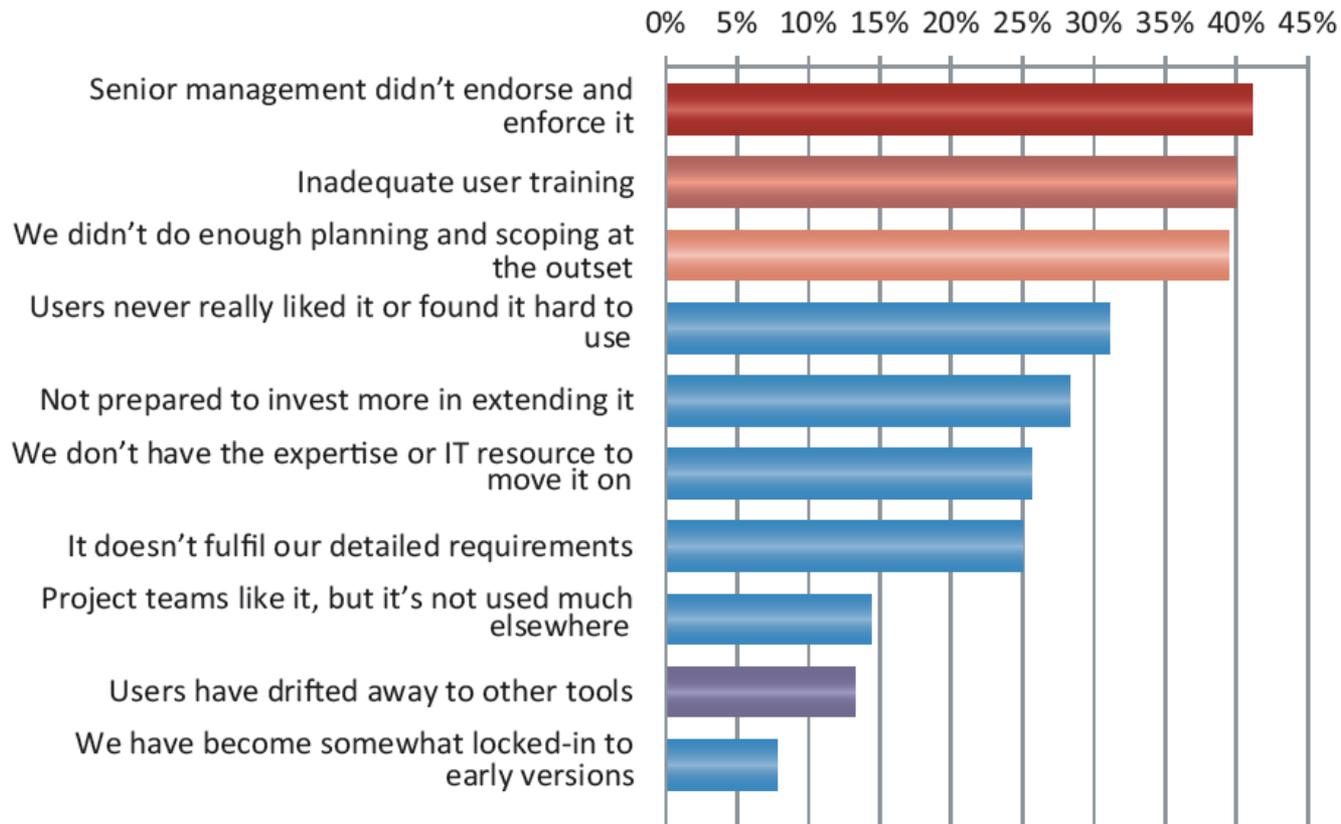


Source: [AllM 2015 Report](#)



# WHY?

Also according to the 2015 AIIM report:



Source: [AIIM 2015 Report](#)



# WHAT IS GOVERNANCE?

Microsoft  
SharePoint

## What is governance?

SharePoint 2013

### IT governance

How will you control the services that you offer? What will you provide with each service? What will you include in service level agreements for each service? And how do you prevent proliferation of unmanaged services?

**What to govern:**

- Security: Information, network, application, privacy
- Costs: Do the costs of IT services add value or detract from it? Do they? What are the costs of the services? Do you have a budget? Do you have a cost center? Do you have a profit center? Do you have a loss center?
- Service quality: Do the services meet the needs of the users? Do they meet the needs of the business? Do they meet the needs of the industry? Do they meet the needs of the market?
- Compliance: Do the services meet the requirements of the law? Do they meet the requirements of the industry? Do they meet the requirements of the market?

**IT service governance**

What are the IT services that you offer? What are the needs of the users? What are the needs of the business? What are the needs of the industry? What are the needs of the market?

**IT governance**

What are the IT services that you offer? What are the needs of the users? What are the needs of the business? What are the needs of the industry? What are the needs of the market?

### Software + services

**1**

- Application portfolio: Identify the applications that you have and their status.
- Application lifecycle: Understand the lifecycle of the applications and how to manage it.
- Application security: Ensure that the applications are secure and meet the requirements of the law.
- Application performance: Monitor the performance of the applications and ensure that they meet the needs of the users.
- Application integration: Ensure that the applications are integrated with each other and with the other systems in the organization.

**2**

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### Deployment governance

Deployment governance is the process of managing the deployment of SharePoint 2013 in your organization. It includes the following:

- Deployment strategy: Define the strategy for the deployment of SharePoint 2013 in your organization.
- Deployment plan: Develop a plan for the deployment of SharePoint 2013 in your organization.
- Deployment execution: Execute the plan for the deployment of SharePoint 2013 in your organization.
- Deployment monitoring: Monitor the deployment of SharePoint 2013 in your organization.
- Deployment reporting: Report on the deployment of SharePoint 2013 in your organization.

### Information management

### Content + Information stored by users

How will you govern the information in your organization, such as documents, files, Web sites, and Web pages? How do you measure the information's usability and manageability? Who has access to that content? How are you making content available internally and externally and to whom?

**Information architecture**

Information architecture is the process of organizing and structuring information to support the needs of the users. It includes the following:

- Information architecture strategy: Define the strategy for the information architecture in your organization.
- Information architecture plan: Develop a plan for the information architecture in your organization.
- Information architecture execution: Execute the plan for the information architecture in your organization.
- Information architecture monitoring: Monitor the information architecture in your organization.
- Information architecture reporting: Report on the information architecture in your organization.

**Information management tools**

Information management tools are used to manage the information in your organization. They include the following:

- Document management: Tools for managing documents, such as SharePoint Document Set and SharePoint Document Template.
- Content management: Tools for managing content, such as SharePoint Content Organizer and SharePoint Content Organizer Web Part.
- Information management: Tools for managing information, such as SharePoint Information Management System and SharePoint Information Management System Web Part.

### Basic concepts

**Governance Segments**

Information is the most valuable asset of any organization, and governance is the process of managing that asset. It includes the following segments:

- Information management: Managing the information in your organization.
- Application management: Managing the applications in your organization.
- IT governance: Managing the IT services in your organization.
- Software + services: Managing the software and services in your organization.
- Deployment governance: Managing the deployment of SharePoint 2013 in your organization.

**Governance and Site Types**

Information is the most valuable asset of any organization, and governance is the process of managing that asset. It includes the following site types:

- Enterprise site: A site that is used for enterprise-wide information.
- Departmental site: A site that is used for departmental information.
- Team site: A site that is used for team information.
- Project site: A site that is used for project information.
- Public site: A site that is used for public information.

**Governance Team**

The governance team is responsible for managing the information in your organization. It includes the following members:

- Information management: Managing the information in your organization.
- Application management: Managing the applications in your organization.
- IT governance: Managing the IT services in your organization.
- Software + services: Managing the software and services in your organization.
- Deployment governance: Managing the deployment of SharePoint 2013 in your organization.

**Governance and Training**

Information is the most valuable asset of any organization, and governance is the process of managing that asset. It includes the following training and adoption strategies:

- Training: Providing training to the users of the information in your organization.
- Education: Providing education to the users of the information in your organization.
- Content: Providing content to the users of the information in your organization.
- Search: Providing search capabilities to the users of the information in your organization.
- User Adoption: Encouraging the users of the information in your organization to use the information in your organization.

### Application management

### Custom solutions

How will you manage the applications that are developed for your organization? What customizations do you allow in your applications, and what are your processes for managing those applications?

**Customization policy**

Customization policy is the process of managing the customization of applications in your organization. It includes the following:

- Customization strategy: Define the strategy for the customization of applications in your organization.
- Customization plan: Develop a plan for the customization of applications in your organization.
- Customization execution: Execute the plan for the customization of applications in your organization.
- Customization monitoring: Monitor the customization of applications in your organization.
- Customization reporting: Report on the customization of applications in your organization.

**Branding**

Branding is the process of creating a unique identity for your organization. It includes the following:

- Branding strategy: Define the strategy for the branding of your organization.
- Branding plan: Develop a plan for the branding of your organization.
- Branding execution: Execute the plan for the branding of your organization.
- Branding monitoring: Monitor the branding of your organization.
- Branding reporting: Report on the branding of your organization.

### Information management tools

Information management tools are used to manage the information in your organization. They include the following:

- Document management: Tools for managing documents, such as SharePoint Document Set and SharePoint Document Template.
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**When thinking about content, consider the following:**

- What is the content? (e.g., documents, images, videos)
- Who is the content for? (e.g., internal, external)
- How is the content managed? (e.g., version control, metadata)
- How is the content accessed? (e.g., search, permissions)
- How is the content protected? (e.g., security, backup)

Microsoft



# 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?

SharePoint Surveyor

Mode: Content

Delivery: Details  
<https://totalsol.sharepoint.com/delivery>

Lists Libraries

List Name	Item Count	Security	Url
▶ Best Practices <span>Note</span>	9	Inherits	/delivery
▶ Client Contacts <span>Note</span>	116	Inherits	/delivery
▶ EATT Changes <span>Note</span>	3		/delivery

Permissions

Name ▲	Permissions
Daniel Charlton <span>Note</span>	Everything
Joe Dormer <span>Note</span>	Open, BrowseUserInfo
Nick Freling <span>Note</span>	Open, BrowseUserInfo
Rebecca Quasney <span>Note</span>	Open, BrowseUserInfo
	ViewListItems, OpenItems, ViewVersions,



# 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](#)



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