

# Driving End User Adoption for SharePoint 2010

Sharee English

SeattlePro Enterprises



# Pain Points

- Employees Unaware of Powerful SharePoint Features
- SharePoint Deployed Without Governance
- User Community Not Involved in Planning SharePoint Site Use
- End Users Expected to Create or Manage SharePoint Sites
- Inefficient Use of Document Management Features
- Uncertainty that Confidential Information is Secure
- Added Training Needs Burden Staff
- SharePoint Training Not Based on End User Needs
- Help Desk Unable to Answer SharePoint Questions
- Change in Organizational Culture Required for SharePoint to Be Accepted

# SharePoint Projects Should Be Like Any Other Major Successful IT Project

1. Executive & business sponsorship is key
  - Cant just be driven by IT
2. Define business goals, vision & success criteria
  - Then measure & report actuals vs. planned
3. Begin with the end in mind
  - Plan for multiple phases & iterations
  - Develop a release roadmap

# SharePoint Projects Should Be Like Any Other Major Successful IT Project

4. Information architecture, governance & (simple) templates are huge
5. Consider use case scenarios, usability & user interface
  - How will end users interact with SharePoint?
  - WIIFM – What's in it for me?
6. Think about training and communication plans
7. Migration & upgrade planning
8. Drive & reward desired changes in behavior
9. Have a feedback look – formal (surveys) & informal
10. Internal marketing & case studies

# Critical Factors in Planning

- Governance Plan
- Taxonomy Plan
- Factor time in for training
  - End Users
  - IT Administrators
  - Developers
  - Designers
  - Contributors
- Develop a communication plan
- Internal user groups & champions
- Think about process & role changes
- First phase will take the longest

# Governance Planning

- Key members from various business units - not just IT
- Focus on the vision and long-range goals
- Ability to adapt to changes in requirements
- Relevancy to needs of the organization

[Sample Governance Plan](#)

# Taxonomy Planning

- Governance team that will own and manage the taxonomy
- Classification of information according to categories
- Focus on the business, not on SharePoint

[Metadata Planning Worksheets](#)

# Communication Planning

- What SharePoint is
- Governance and taxonomies for use in SharePoint
- Building excitement for what SharePoint will be able to do in their environment
- How it fits into the existing ecosystem of technologies
- What it might be replacing
- Discovering and building SharePoint advocates

[The SharePoint Dude Communication Plan](#)

# Training Planning

- Focuses on the needs of individual users
- Holds users accountable
- Teaches the technical "how-to" about SharePoint
- Shares the reasons and best practices for using SharePoint
- Incentivizes employees
- Provides key competency certifications that encourage and build confidence when key concepts are mastered

[University of Colorado Sample Training Plan](#)

# Find your “Killer” Application

- \* Ideally content or functionality that is only available on the “SharePoint Channel”

# Scorecards & Dashboards

Operations Detail

	3Q1 CY 2004			Trend	3Q2 CY 2004		
	Actual	Target			Actual	Target	
<b>Revenue</b>							
Revenue	\$11,386,315	\$11,386,315	0%	↑	\$14,371,807	\$14,371,807	0%
Channel Revenue	\$7,102,685	\$8,051,000	-12%	↑	\$8,935,377	\$10,359,000	-14%
Internet Revenue	\$4,283,630	\$4,283,630	0%	↑	\$5,436,429	\$5,436,429	0%
<b>Sales</b>							
Sales Amount	\$11,386,315	\$14,613,989	-22%	↓	\$14,371,807	\$12,524,947	15%
Internet Sales Amount	\$4,283,630	\$4,410,140	-3%	↓	\$5,436,429	\$4,711,993	15%
Sales Qtr	31,517	46,426	-32%	↓	43,669	34,669	26%
Avg Sales Amt	\$1,872	\$2,461	-24%	↓	\$2,697	\$2,009	31%
Retailer Avg Sales Amt	\$15,997	\$22,521	-29%	↓	\$19,856	\$17,997	13%
<b>Margins</b>							
Gross Profit Margin	15.77%	18.0%	-12%	↑	15.39%	18.0%	-14%
Retailer Gross Profit Margin	0.3%	5.0%	-94%	↓	-0.9%	5.0%	-108%
Expense to Revenue Ratio	24.6%	18.0%	-37%	↑	18.8%	18.0%	-10%

**KPI Details**  
**KPI: Gross Profit Margin**  
 Metrics: Target  
 Reason: Fixed Value  
 Row Path: Margins/Gross Profit Margin  
 Column Path: Q1 CY 2004/Target  
 Actual: 15.77%  
 Variance: -12%  
 Calculation: Increasing is Better  
 Banding Method: Band by normalized value of Actual/Target  
 Status Band: Stoplight

Status Band	Value
On Target	>= 0.22
Slightly Off Target	0.22 to <= 0.58
Off Target	< 0.18 or less

Gross Profit Margin (2004) Gauge



Customer Scorecard

	FY 2004 Actual	Target	Trend
<b>Customer Growth</b>			
Growth in Customer Base	440.8%	30.0%	↑
Customer Count	17,432	3,868	↑
<b>Customer Satisfaction</b>			
Average Customer Survey Rating	8.1	7.5	↑
Number of Complaints	81	80	↓
<b>Customer Management</b>			
Close Call Percentage	36%	49%	↓
New Product Acceptance Rates	31%	29%	↑

Sales by Country (Pie Chart)

Sales by Region (Pie Chart)

Gross Profit Over Time (Line Chart)

Gross Profit by Region (Stacked Bar Chart)

Decomposition Tree: Internet Sales Amount



# Enterprise Search

**FAST Search** Search Results Adam Barr

All Sites People

market analysis Preferences Advanced

Result Type: 1-10 of 260 results Sort by: Relevance

**Any Result Typ...**

Microsoft Powe... (92)

Microsoft Exce... (83)

Microsoft Word (51)

**Site**

Any Site

fastdemo17.fas... (260)

**Author**

Any Author

System Account (260)

Alan Brewer (33)

Contoso (24)

Eduard Dell (13)

show more v

**Modified Date**

Any Modified D...

Past 24 Hours (0)

Past Week (0)

Past Month (1)

Past Six Month... (260)

Past Year (260)

Earlier (0)

**Company**

Any Company

Contoso, Ltd (228)


Federal Depos... (72)


**Adventure Works - Market Opportunity Analysis - Recommendations**


... Deliverables: **Market Opportunity Analysis Matrix** ... software on the **market** to automateTransportation ... Create a **marketing** campaign ... Deliverables: **Market Opportunity Analysis Matrix** ...

Authors: System Account Alan Brewer Date: 10/12/2009 Size: 6MB  
<http://fastdemo17.fastsearchdemos.net/Custo...> Opportunity Analysis - Recommendations.pptx

Close Preview | View In Browser | Similar Results







**Adventure Works - Market Opportunity Analysis - Request for Proposal**

... Vendors for the **Market Opportunity Analysis**. Contoso team conducted **market opportunity analysis** to ... **DRAFT Market Opportunity Analysis Page 1 of ...**

Authors: System Account Tibb Ringstrom Date: 10/12/2009 Size: 108KB  
<http://fastdemo17.fastsearchdemos.net/Custo...> rtunity Analysis - Request for Proposal.docx

View In Browser | Similar Results

**Adventure Works - Market Opportunity Analysis - Sales Pitch**

... **Market Opportunity Analysis** Contoso team conducted **market opportunity analysis** to uncover new ... deliverables: **Market Opportunity Analysis** documentation and ...

Authors: System Account Alan Brewer Date: 10/12/2009 Size: 5MB  
<http://fastdemo17.fastsearchdemos.net/Custo...> rket Opportunity Analysis - Sales Pitch.pptx

Preview | View In Browser | Similar Results

**Adventure Works - Market Opportunity Analysis - Project Proposal**

... conducted **market opportunity analysis** to uncover ... implementation of the **Market Opportunity Analysis**. Recommend ... information into the **Market Opportunity Analysis** software ...

Authors: System Account Alan Brewer Date: 10/12/2009 Size: 40KB


**Related Searches**


Market Opportunity Analysis


Mobile Market Analysis

Market Trends Analysis

**People Matches**

 David W. Derwin  
Product Manager  
1099 Contractor

 Tibb Parts  
Accounting Manager  
Accounting

 Ted Bremer  
Business Process Manager  
Project Management

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**MSDN/TechNet Results**

Step-by-Step Guide to Bulk Imp...  
This creates a LDIF file named Marketing.ldf, by connecting to the server named HQ-RE...  
<http://technet.microsoft...>

Marketing System Database Tabl...  
The Marketing System stores data in three SQL Server databases. Most of the marketing...  
<http://technet.microsoft...>

Marketing System  
The Commerce Server 2009 Core Marketing System (Marketing System) is a high-performan...  
<http://technet.microsoft...>

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# Idea & Innovation Management

## IdeaExchange

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View my profile

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Post Your Idea

### Spotlight on Research Tools – Make Your Idea Better!

**ThinkWeek:** In addition to Idea Exchange, Microsoft employees have shared their ideas and new thinking in the form of ThinkWeek papers. Check out ThinkWeek papers and add comments and ratings to any paper.

**Research tool:** Develop your current ideas and thoughts with relevant content. The Research tool helps you identify and pull contextually similar documents from different sources, such as ThinkWeek papers, LCA-Approved Patents (Owned and Licensed), MSR Publications and Bing, and delivers the results in a practical format. Microsoft has a wealth of knowledge and information generated by employees just like you, and the Research tool taps into this treasure trove to make it accessible and useable by employees!

#### Top Ten Ideators

- ashwinn (62)
- patriand (29)
- craigwi (22)
- tonyso (22)
- ross (21)
- ryanco (20)
- benitah (18)
- jennam (18)
- mattge (18)
- assenh (17)

#### Top Ten Collaborators

- bwill (112)
- rohamp (57)
- martinp (53)
- jecath (49)
- erik (39)
- roking (32)
- jp martin (29)
- jchismar (24)
- davevr (22)
- dani (20)

### Hot Ideas

Viewing: Entire Site

Subscribe to new ideas Top Ideas Highly Commented Popular New Ideas

Browse: 1 2 3 4 5 of 172 Go to Page

VOTE FOR

Score  
763

#### The Microsoft Store

Todd Bremner

Original Idea from Todd Bremner --The more we pursue Consumer electronics and the home market, the more I wonder why we do not have the Microsoft Store – and without it, I wonder how we are ever going to get the consumer to become connected to us in ...More

84 Comments  
Email to  
2319 Views  
888 days ago

Grassroot Idea  
Add to My Favorites

VOTE FOR

Score  
311

#### A mouse for the blind

Mario Esposito Vincent Bannister

Oculus is an alternative display and input device aimed at the blind, essentially a tactile screen and mouse replacement. It represents UI elements on a surface of touch-sensitive variable-height pins.

12 Comments  
Email to  
575 Views  
901 days ago

Grassroot Idea  
Add to My Favorites

### Download the Gadget



Download the IdeaExchange Gadget to access ideas from your desktop.

### How it Works

More >

The Idea Exchange is an enabling tool to help Microsoft employees bring ideas to fruition.



Sort tags: Alphabetically Search

Windows N&S (6) Delivery Processes (14)  
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SS Strategy for Enterprise Services (5) Whitespace (12)

advertising (185)

### Live Feed

What's New...

#### Idea: Sharepoint Site Instrumentation

Posted By: oneshid  
Date Posted: 3/23/2010 11:34:42 AM  
Site Instrumentation component provides Users/Admin a better insight ...More

#### Idea Update: Sharepoint Site ...

Posted By: oneshid  
Date Posted: 3/23/2010 11:30:16 AM  
Site Instrumentation component provides Users/Admin a better insight ...More

# Crawl, Walk, Run with SharePoint

- <http://tinyurl.com/SPCrawlWalkRun>

[Chris Bortlik's Blog](#)

# Crawl –

- 1<sup>st</sup> impressions matter – look & feel, usability
- Tackle governance, migration planning & information architecture
- Start with out of the box SharePoint features & minimum customizations
- Search

# Walk – LOB Applications

- Internally – SharePoint portal & “surround” strategy
- Enterprise Search
- Records Management
- SharePoint Composite Applications, Custom Workflows, & Business Intelligence
- Extranet Collaboration Sites
- Web Content Management

# Run – Enterprise Applications

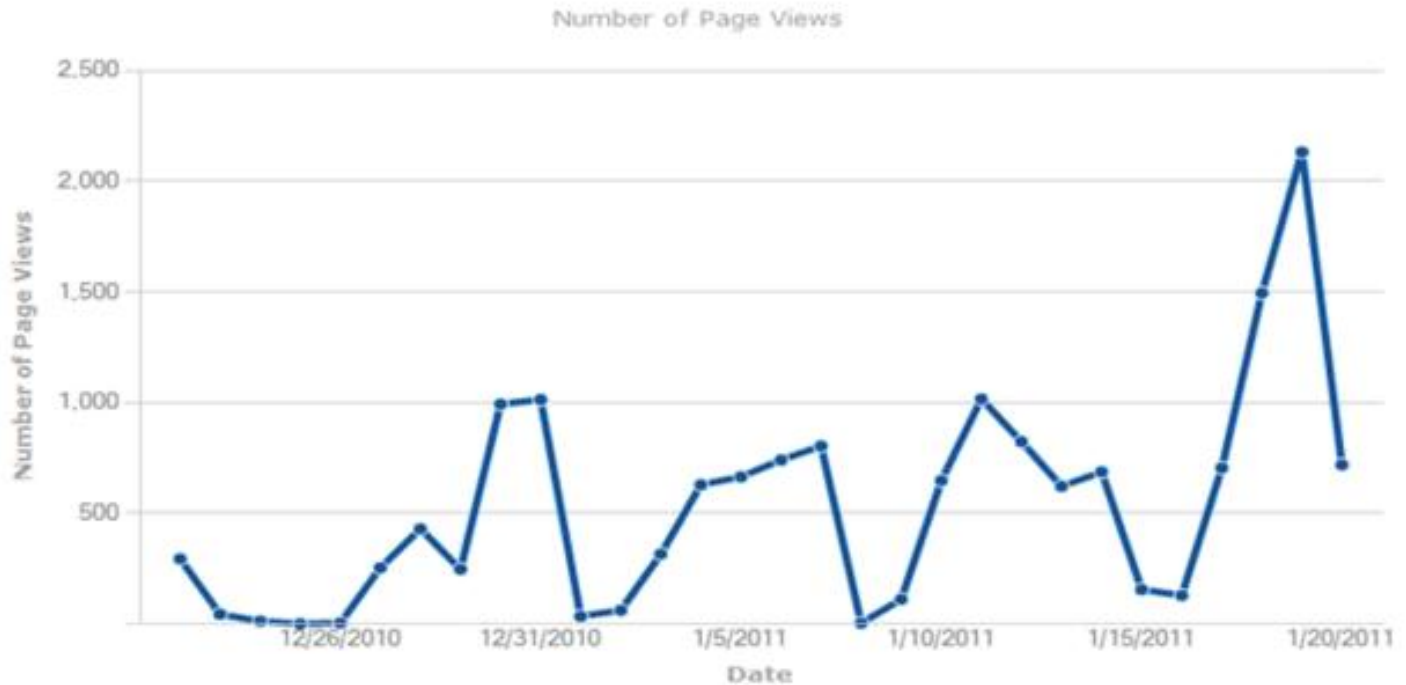
- Web Content Management – I
- Internet Sites
- External commerce site integration
- Custom SharePoint .NET & Open XML
- Advanced systems integration

# SharePoint 2010 Analytics

<http://tinyurl.com/spanalytics>

Date Range 12/22/2010 - 1/20/2011 (UTC-08:00) Pacific Time (US and Canada) [Change Settings](#)

- Summary
- Traffic
  - Number of Page Views**
  - Number of Daily Unique Visitors
  - [Number of Referrers](#)
  - Top Pages
  - Top Visitors
  - Top Referrers
  - Top Destinations
  - Top Browsers
- Search
  - Number of Queries
  - Top Queries
  - Failed Queries
  - Best Bet Usage
  - Best Bet Suggestions
  - Best Bet Suggestions Action History
  - Search keywords



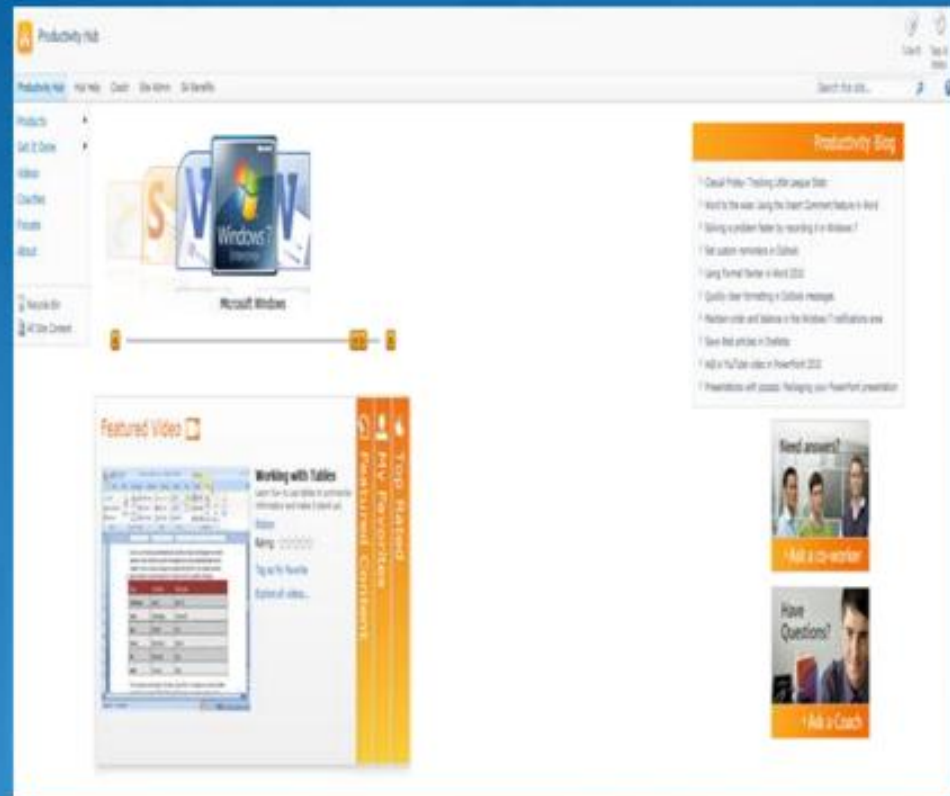
Data Last Updated: 1/16/2011 10:28:39 PM

Inventory	Date†	Number of Page Views
Storage Usage	12/22/2010	294
Number of Sites	12/23/2010	43
Top Site Product Versions	12/24/2010	12
Top Site Languages	12/25/2010	0
	12/26/2010	4
Customized Reports	12/27/2010	253
	12/28/2010	429

# The Productivity Hub

## Continuously Updated Content for Users

- **Format:** Pre-loaded SharePoint site collection
- **Content:** End user productivity training in a variety of formats (documents, videos, podcasts, etc.) with free quarterly updates
- **Blog:** Tips and tricks for end user productivity
- **Train the trainer:** Coach program
- **Products:** Office, SharePoint, Windows, OCS, LiveMeeting, Visio, Project



<http://tinyurl.com/spprodhub>

# SharePoint 2010 Adoption Paper

<http://tinyurl.com/spadopt>

## Sharepoint Server 2010 Adoption Best Practices White Paper

### Brief Description

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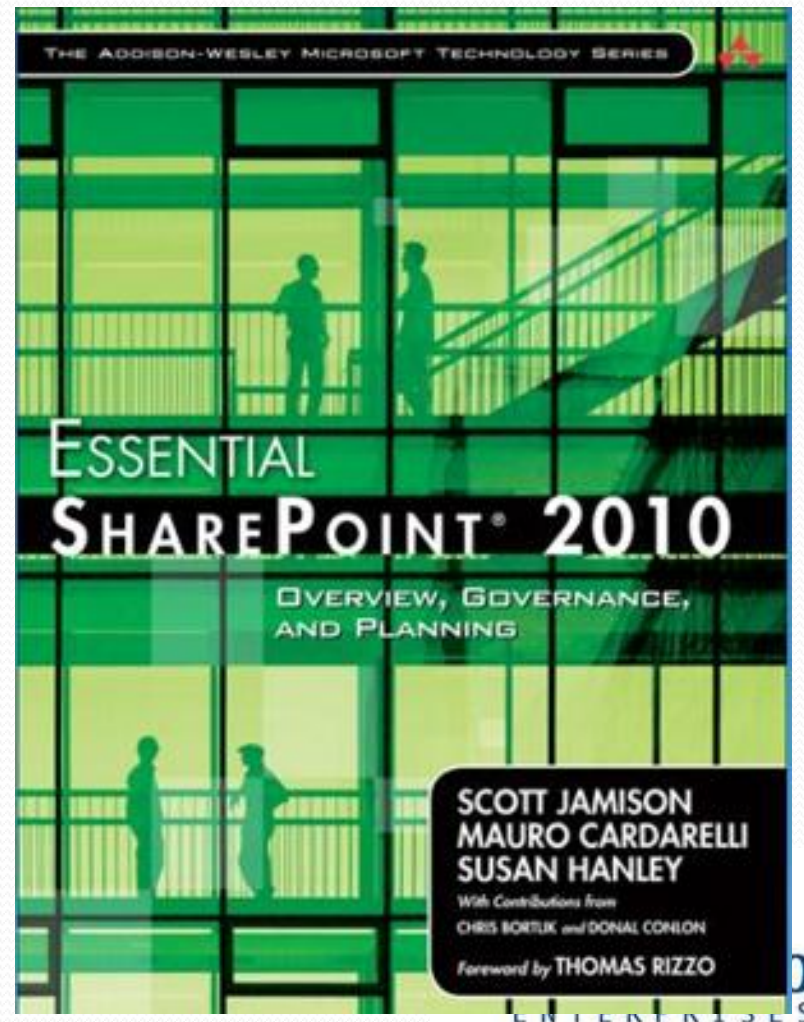
In this white paper, you will learn how to plan, organize, and create a SharePoint adoption plan. We'll also provide some examples of how to integrate your governance plan into the training and communications plans for your solution.

### On this page

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- ↓ [Quick Details](#)
- ↓ [Overview](#)
- ↓ [System Requirements](#)
- ↓ [Instructions](#)

# End User Reference



# Local SharePoint Support

- SharePoint Users Group
- SharePoint Connections on Tour
  - San Diego May 3-5
  - San Francisco May 9-11
- SharePoint Saturday Sacramento – June 18
- SeattlePro
  - Training
  - Consulting

# Summary

- Just because you build it, doesn't mean they will come (WIIFM)
- Users of SharePoint have jobs & other options to get their work done
- Not having a plan is planning to fail
- Use Phases
- Crawl, walk, run
- Training & Communication planning is key