

Leading Practices for Planning and Implementing a SharePoint Environment

David Drever

- Solvera Solutions

- Microsoft Office Servers and Services MVP
- Senior SharePoint Consultant
- Leadership team member Saskatchewan SharePoint Office365 User Group
- SharePoint JoAT (Jack of All Trades)



Email : davidmdrever@outlook.com

Twitter : [@DavidMDrever](https://twitter.com/DavidMDrever)

LinkedIn :

<https://www.linkedin.com/in/david-drever-a4b489a>

Topics we will cover

- What is a Leading Practice
- Why should we consider following leading practices
- Leading practices

My goals for this session

- Allow you to learn from my experience
- Get you thinking
- Help you be ready for the next implementation of SharePoint (installation or project)

What are Leading Practices

- A method or process that best fits your situation
- Helps you end up with the best solution at the end of the day
- Accepted by many to be the most correct way of doing something

Why Should We Use Leading Practices

- Increases quality and efficiency
- Has been proven to work time and again
- Usually developed\created by people with a great deal of experience and knowledge in the area the leading practice deals with.

Experience over training

- Training usually only covers generic situations
- Don't train with the expectation they are ready to plan and deploy
- Involve those who have done this before

Experience over training

- Advantages
 - Will end up with a better implementation
 - Designed with long term growth in mind
 - Have learned from THEIR mistakes (one can hope).
- Disadvantages
 - Cost
 - Sometimes difficult to know if they have enough experience

Build a proof of concept

- Determine the High Level Business Requirements and configure the POC to meet as much of this as possible with OOTB features
- Create a basic environment
- Let your SMEs make use of it before building out requirements

Build a proof of concept

- Pick a project or two that is contained exclusively with SharePoint
- Do NOT move the POC into prod when complete

Build a proof of concept

- Advantages
 - People learn what they need before they finalize the requirements.
 - Will help you determine the level of engagement you will receive from your users
 - Helps you have a “practice run” for creating your environment
 - Project team and business may find that what was thought to require custom coding could be accomplished using SharePoint OOTB features, but in a way not considered

Build a proof of concept

- Disadvantages
 - Can extend the time of your project
 - May be hard to get adoption

Involve the Business from the start

- Don't leave to just IT
- Ensure the business areas that will use it the most (from implementation) are included from the beginning
- Ensure the business gets to use the POC
- Ensure managers understand SMEs in their area are needed, not just people who might have the free cycles.
- Work with the SMEs to create high level test scenarios for the POC

Involve the Business from the start

- Advantages
 - Better adoption once implemented
 - Business has better understanding of SharePoint when it is implemented
 - Business processes have better chance of being steam-lined with the implementation
 - May have to turn some business away or put off because they know what SharePoint can do for them.

Involve the Business from the start

- Disadvantages
 - May have to turn some business away or put off because they know what SharePoint can do for them.
 - Hard to get business involvement if they aren't familiar with the product
 - Key people may not be available when you need them to be.

If integrating, get more experts.

- Don't assume your team can muster up the knowledge
- Ensure your experts (for all the systems) understand the end result the client is looking for

If integrating, get more experts.

- Advantages
 - Will end up with a better implementation
 - Designed with long term growth in mind
 - Have learned from THEIR mistakes (one can hope).
- Disadvantages
 - Up front cost
 - Sometimes difficult to know if they have enough experience
 - Sometimes, what each expert believes is the best method to integrate isn't the best method for you and vice versa.

Keep the “Big Picture” in mind, but plan small

- It's important to know what you want the system to do for you when it's done.
- Keep that in mind, but build it out in major components.
- Do not implement all at once. Build out the components as you create them.
- Be ready to change the small picture to better create the big picture

Keep the “Big Picture” in mind, but plan small

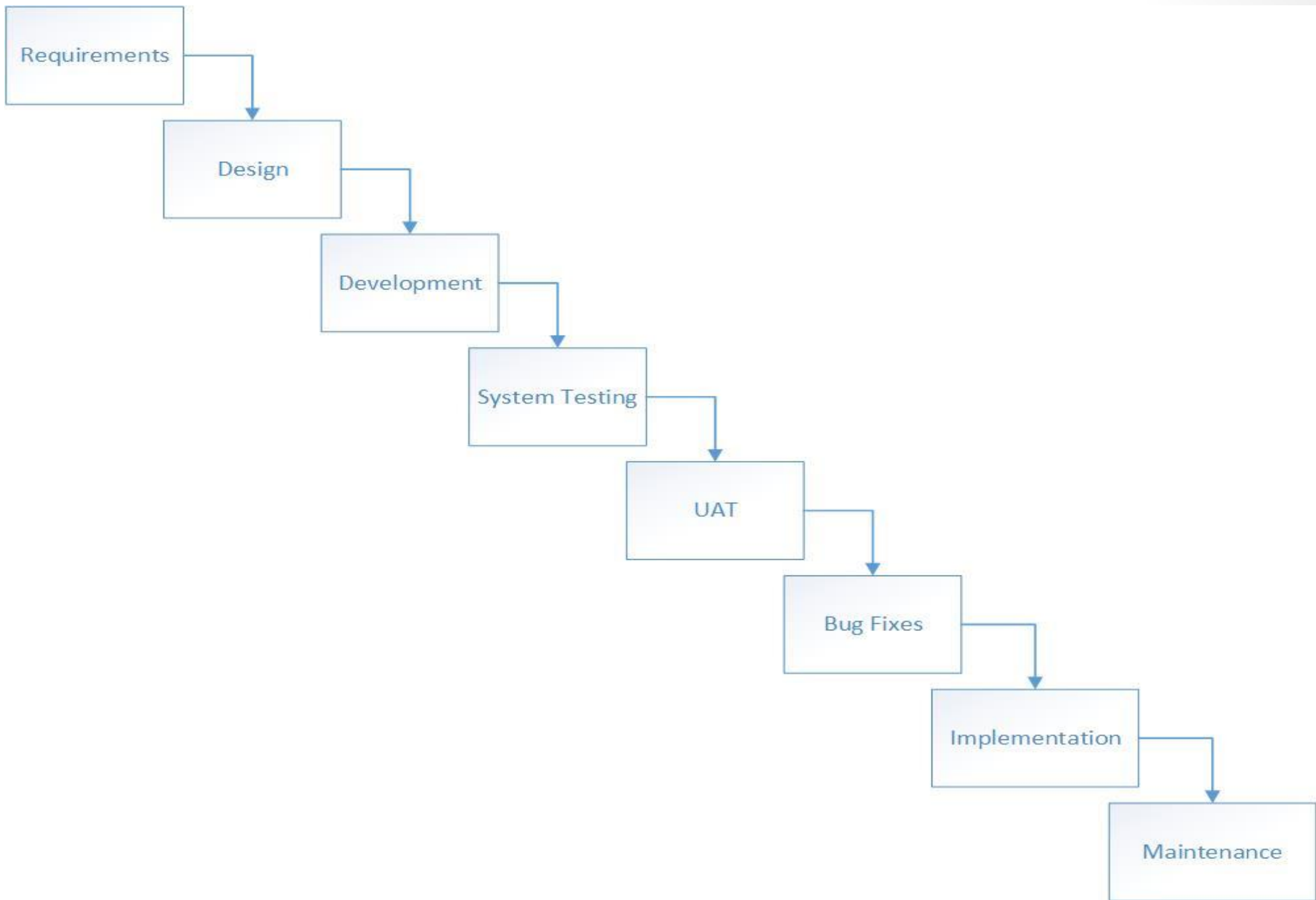
- Advantages
 - Being able to build the bigger picture in smaller pieces can increase the efficiency and can help keep things on budget and time.
 - Allows users to try out the features you are building and allows the knowledge of the final product to mature as the solution is built.
 - Allows for modifications to create a better solution in the end because their understanding has increased

Keep the “Big Picture” in mind, but plan small

- Disadvantages
 - Very Agile and with all things agile not everyone “buys” into it. If you don’t have buy in from everyone, it may falter
 - Possibility of it taking longer as this does allow for changes and enhancements

Stay away from Waterfall

- Waterfall is a bad fit for an implementation like this.
- Too many moving parts to completely catch them all in a Waterfall
- A SharePoint implementation is generally too long running to fit within a waterfall methodology.
- No option to try it out as you create the solution.



Stay away from Waterfall

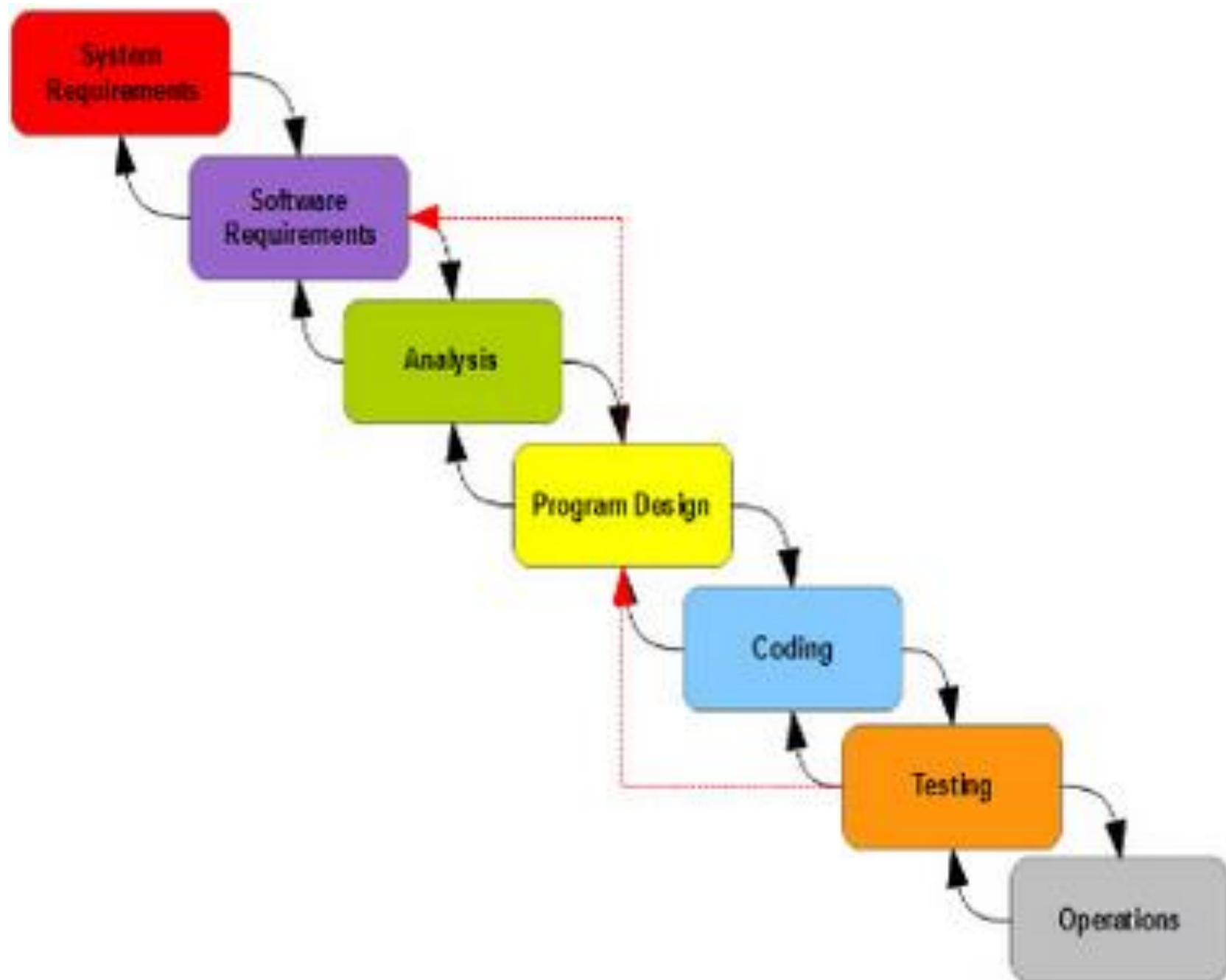
- Advantages
 - Opportunity to pick a methodology that better fits the needs of a project of this scope.
 - Able to follow the other leading practices outlined in this presentation.
 - Solutions will tend to be better as other methodologies tend to allow for changes as the solution is built.
 - Don't have to worry about "square peg, round hole"

Stay away from Waterfall

- Disadvantages
 - Lots of businesses like Waterfall so adoption will be hard
 - If the business doesn't usually work in a non-waterfall environment their implementation of another methodology may be lacking.

What if you have to use Waterfall?

- Attempt to implement a modified Waterfall method.
- Try to create demos for the SMEs to ensure things are turning out the way they expect and hope.



Give the process time...but not too much

- Ensure you give users the time they need to learn about SharePoint. Practice in the POC.
- Give them the time they need, but plan and stick to that plan.
- Define learning goals for the users
- Get feedback to help build out detailed business requirements and design
- Allow for buffer as well since changes will happen

Give the Process Time

- Advantages
 - Users have a better understanding of the solution
 - Stages aren't rushed.
 - Better chance at a better solution
- Disadvantages
 - Hard to gauge how much time is enough
 - Business sponsors may feel the team is sitting around doing nothing.

Metadata – It needs to be defined sooner than later

- Start stressing the importance of metadata and training in the use of it as early as the POC and business requirements
- Harder to setup metadata post-migration than it is during migration
- Process of setting up the metadata helps the business understand the “new” way of organizing data in SharePoint
- Setup internal workshops to setup metadata groups. Build the content types they believe will best organize their data.

Metadata. Sooner over later

- Advantages
 - Data is organized as it is migrated into SharePoint meaning it doesn't have to be done manually later
 - Less chance of a great deal of folders being created in libraries to organize the data
 - Provides a great deal of advantages besides sorting and filtering within SharePoint if it is there sooner than later.
- Disadvantages
 - It's a lot of work and "man-hours" to get done.
 - People are used to folders. It's a very different way of looking at organizing data.

Governance. You can't ignore it

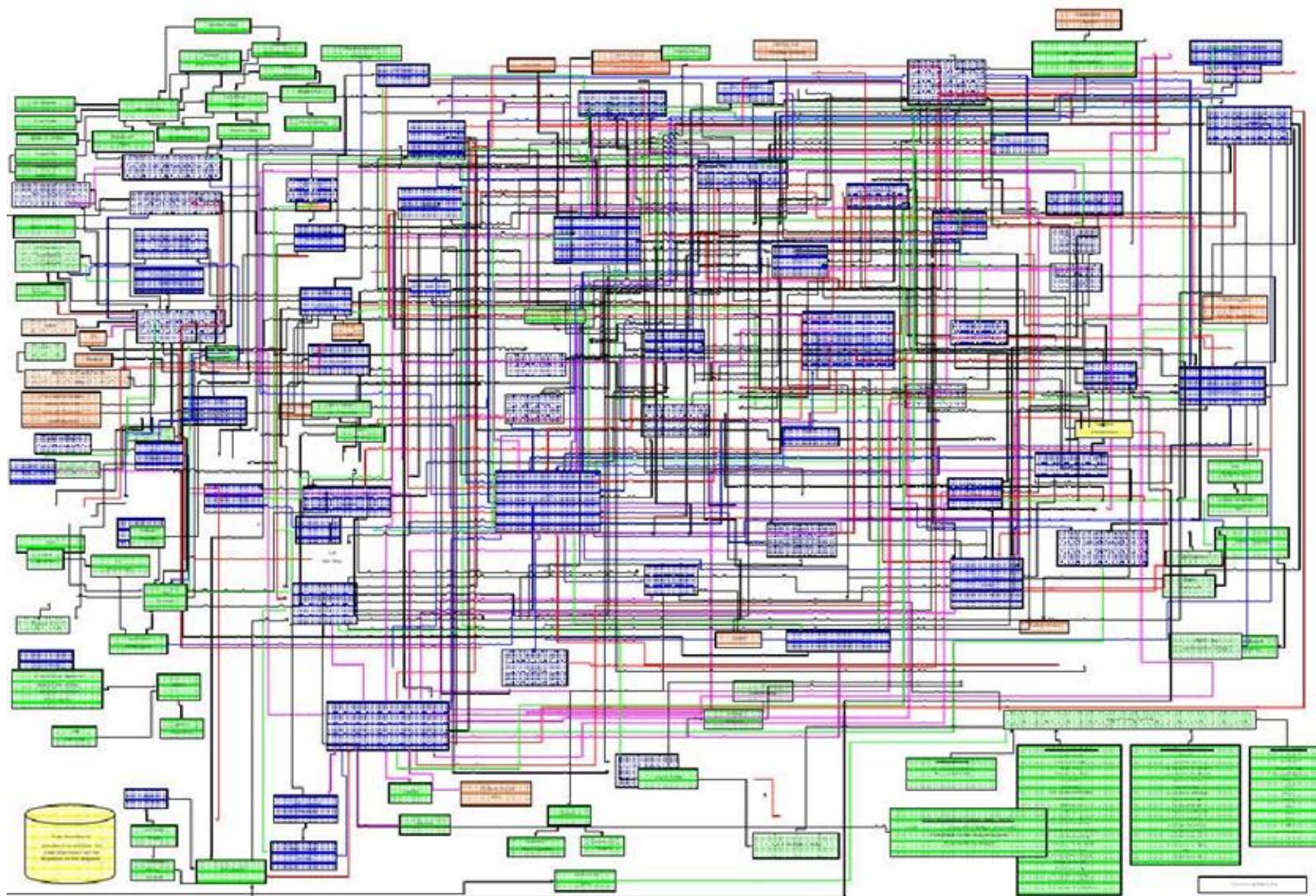
- Microsoft defines governance as follows:

“Governance is the set of policies, roles, responsibilities, and processes that control how an organization's business divisions and IT teams work together to achieve its goals. Every organization has unique needs and goals that influence its approach to governance”

Good governance can help you get a neat little SharePoint package



No governance can give you a mess



Governance

- Needs to be more than a document. It needs to be people too.
- Do not limit to IT. Business should be a big part of it.
- Don't overload the governance council
- Have teams or focus areas within the governance council

Plan to enforce governance

- Having a plan and people in place is all well and good, but ensure they can enforce the governance plan put in place
- Create a plan to enforce. What is to occur if a site or owner doesn't follow the decisions or policies put in place
- Ensure site owners at the least are aware of steps that will be taken for infractions against the governance policies

Plan for Operational Change Management

- Describe to users the changes they are going to see
- Explain as many of the disadvantages they will encounter
- Show them the advantages they will gain from the new system
- Understand that as a whole, people do not like change. Use OCM to help them see that this new system is going to make things better for them instead of worse.

Plan for Third Party Apps

- Should be part of the governance council role
- Determine the criteria when “purchasing” apps is acceptable
- Setup checklist that third party apps must meet
- Always be aware of risks that purchased software has to future versions of SharePoint

Ensure your design incorporates accepted best practices

- Technical best practices are there for a reason.
- Helps to ensure your environment is setup to run as efficiently as possible
- Don't get caught up trying to implement them all. Use the ones that affect you directly

Thank You!

- davidmdrever@outlook.com
- [@DavidMDrever](https://twitter.com/DavidMDrever)
- www.prairiedeveloper.com

