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HOW TO GET THE MOST OUT OF SharePoint

Advice for organizations that are new to SharePoint or are looking to get more out of their SharePoint implementation

KIEFER

White Paper

How do organizations get the most out of SharePoint?

SharePoint is a Microsoft offering that delivers a robust collaboration and content management platform. Unfortunately, many organizations aren't sure where they should begin and struggle with effectively implementing SharePoint.

We have discovered that many organizations don't have a clear vision on how they will deploy the technology. Kiefer Consulting has worked with clients to develop a SharePoint deployment and implementation plan that takes many things into consideration.

A few of those considerations include;

- Appetite for change
- Capacity for change
- Experience in deploying new technology
- User acceptance
- Motivation to change
- Identifying the benefits to users

User adoption is a critical step in SharePoint implementation. Kiefer is focused on designing SharePoint experiences that meet user requirements, are easy to use, and deliver a quality user experience.

Kiefer has published an eBook called the Consultant's Notebook. It's a valuable resource for any organization that is planning on implementing new technology. It offers perspectives on why digital business process transformation initiatives fail and offers ways to leverage against them.

Common SharePoint applications

SharePoint is super flexible. It can be used to solve for a variety of business challenges. This White Paper tackles 4 of the most common uses for SharePoint. We highly suggest considering one of these use cases as a jumping off point for any organization that is interested in doing more with SharePoint.

Here are **4 ways** to get more out of SharePoint -

This White Paper will take a closer look at these 4 use cases and offer valuable perspectives on each.

Collaboration & Co-Authoring

How do I collaborate and co-author with SharePoint?

Co-authoring is available for documents stored in OneDrive or SharePoint.

Have you ever had a document that multiple people in your organization are working on? Have you had to collect feedback, changes, or edits and had to aggregate all of the required updates to the document. If so, this use case is going to be interesting to you. With SharePoint, multiple users can work on a single document, simultaneously. This allows your team to have a "single-source-of-truth". Single-source-of-truth (SSoT) data, as defined by the Harvard Business Review, relies on one unchallengeable source within your own organization to deliver all the crucial data needed to run your business.

The key to maintaining a single-source-of-truth is highly dependent upon version control. It's preferred that the team work collaboratively on a single document to ensure that there are not multiple versions of the document circulating and that all updates are captured.

To co-author with others, you need:

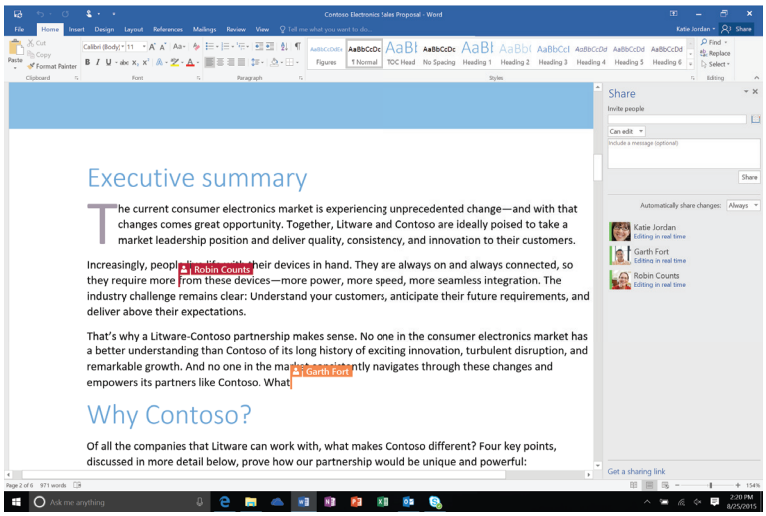
A shared collaboration space
OneDrive, OneDrive for Business, SharePoint Online and SharePoint Server are all useful collaboration spaces that support co-authoring.

Applications that support co-authoring
Microsoft provides a variety of applications that support co-authoring. Word and PowerPoint on all devices and versions more recent than Office 2010 support co-authoring. The Excel mobile apps and Excel 2016 with Office 365 also support co-authoring.

A co-authoring friendly document
Co-authoring is only supported on modern file formats including: .docx (Word), .pptx (PowerPoint), and .xlsx (Excel).

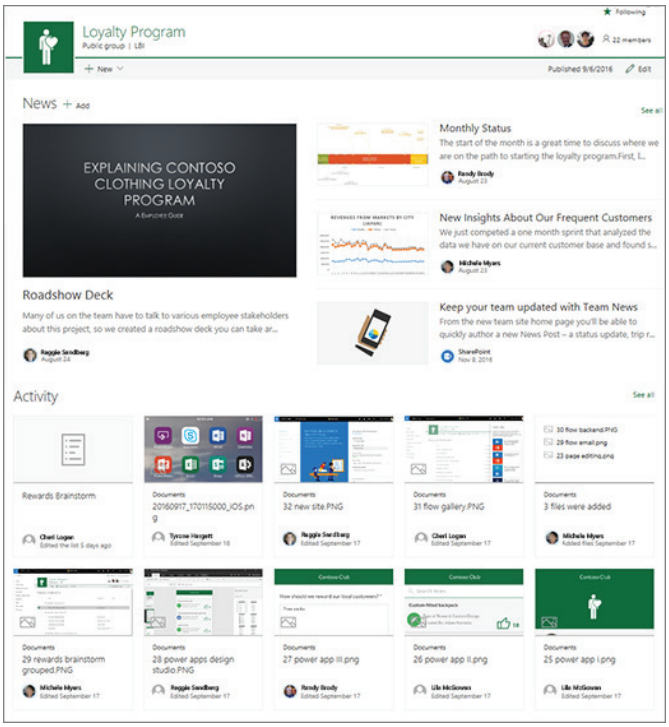
Edit permissions for co-authors
All co-authors must have permission to access and edit the documents.

Create or open documents for co-authoring
You can create documents in Office Online or Office desktop products. These documents can be co-authored.



Team Sites

Being able to collaborate is critical in today's business environment. High performing teams need to be able to quickly share information and conveniently review documents. Furthermore, this level of collaboration needs to take place regardless of the devices that the team uses or where team members are located. Technology has enabled teams to communicate with fewer barriers than ever before, however, some organizations struggle to get their arms around the technology that will put an end to the challenges of bringing teams together, speeding the flow of information and fostering collaboration.



Some of the most significant collaboration challenges are associated with collaboration on documents. Many organizations require team input and review on documents. Unfortunately, teams may lack the processes or technology to ensure that teams are going about collaboration in the right way. We often find that team members are editing an earlier version of a document or that changes to a document aren't made because of the clutter of versions flying back and forth.

Is this the right version?

Collaboration has amplified the versioning dilemma. If you've ever edited a team member's document that was titled "file_name_final_FINAL", you know all about the challenges of version control. Passing versions of a document from team member to team member via e-mail will ultimately result in the team making changes to documents that do not reflect changes made by other members of the team. We've seen organizations try creative file naming conventions help the document review process, but in the end, users are still stumped when it comes to determining whether or not the version they are editing is the most up to date version of the document.

This file is too big to send. Now what?

Many businesses use email as their primary mode of communication. With size limitations, e-mail has proven itself as not being the best place for enterprise collaboration. When the file you need to share is too big to attach, employees will resort to unconventional and risky methods of sharing information. It is common for users share information in using tools that are not approved by the organization. In some cases, users will get creative using e-mail and split a large file into multiple small ones. This practice results in more clutter and makes it challenging for the document owner to capture comments, recommendations or changes from their colleagues.

These two examples make a very strong case for a SharePoint Team Site. A centralized collaboration space where teams can store critical documents and collaborate.

Intranets

An organization's intranet has the potential to be a valued resource for employees. It also can become the most underappreciated and underutilized resource that the organization has invested in. If you want to build a great intranet, you have to connect users to relevant and up-to-date content – quickly. If you are unable to deliver the desired information quickly, users will lose confidence in the intranet. Once users stop using the intranet, they'll resort to using e-mail to locate and share information. This method is not only slow, but it also doesn't guarantee that users are working with the most current and up to date information.

When designing an intranet, our team relies on a proven process and methodology. Our approach ensures that the site we are building will meet the needs of the organization and that the employees will use the site. In this blog, we wanted to share a few best practices that we apply when building or "making-over" an intranet.

Create a Quality User Experience
If your organization's intranet isn't being used, has information that is out of date or is difficult to navigate, it is time to consider updating your intranet site. We start the process with an assessment of the user experience. The overall experience should feel unique and personalized. The intranet site should be easy to navigate and the information that is most important to the user should surface without issue.

More Than an Intranet - It's a Collaboration Portal
We have worked with clients to build a better intranet and have even taken things a step further by helping organizations deploy collaboration sites for document sharing, co-authoring, and document management. This makes the intranet not only a place to get information, but also a place where employees can collaborate to "do work".

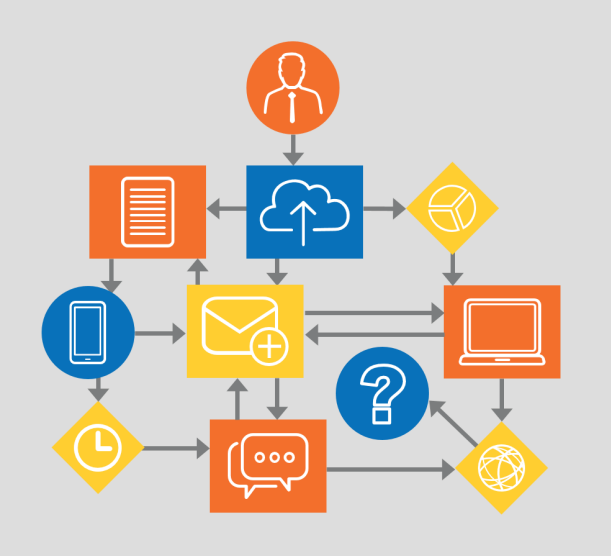
You Can't Have a Great Intranet Without Great Information Architecture
Information architecture and site design are also important considerations when building an intranet. We use a comprehensive set of tools to help ensure that information is easy to locate. One of our tools allows us to conduct tree testing. A tree test shows how users get to certain pages and allows us to identify if users are taking the wrong path to find information. The tool we use is by Optimal Workshop and it is a great product.

Great Search
Another characteristic of a great site is robust and reliable search capabilities. Being able to search the entire intranet site and using keywords helps users find the information they need fast. Our team of consultants have built awesome intranets using SharePoint and have leveraged the powerful search capabilities of the SharePoint platform.

Start with Understanding What Your Users Want and What They Need
Interviewing users is also an important activity in our process. User input is important when we are building intranets. Understanding what users are looking for in their intranet is critical in building something that users will gravitate to. User adoption is dependent upon an intranet that helps users do their job better. Our consulting team has a proven approach to validating user requirements and building sites that meet the needs of users.

Workflows

Kiefer has worked with clients to leverage SharePoint to improve business workflows. We have used SharePoint's built-in workflows, InfoPath, and third-party tools (like Nintex) to help clients bring efficiency to cumbersome business processes.



Digital workflows help organizations improve organizational efficiency and can help improve productivity. The software assists in managing tasks and steps in the process and automates manual processes. Digital workflows enable employees to concentrate on performing the work rather than managing the workflow.

Common workflows that Kiefer has supported

Approval

An approval workflow routes a document or item to a group of people for approval. Kiefer has helped clients build workflows to assist clients in an review / approval workflow. These processes are common across many organizations. We have often seen clients route important documents to a list of required reviewers in a file folder. This process can be automated and we have helped clients reduce the processing time by 60%.

Collect Feedback

A feeback collection workflow will route a document or item to a group of people for feedback. Reviewers can provide feedback, which is then compiled and sent to the person who initiated the workflow. Kiefer worked with a client to digitally route Request for Proposal (RFP)documents to multiple individuals to a gather input. The Kiefer built solution had a positive impact on the process and helped expedite the review process.

Collect Signatures

This workflow routes documents to a group of people to collect their digital signatures. We leverage best-in-class software to facilitate the collection of electronic signatures.

Publishing Approval

This workflow is similar to the Approval workflow in that it automates the routing of content to subject matter experts and stakeholders for review and approval. What makes the publishing approval workflow unique is that it's designed specifically for publishing sites where the publishing of new and updated web pages is tightly controlled.

About Kiefer Consulting, Inc.

Celebrating 30 years of client delivery success, Kiefer Consulting is recognized as the leading provider of online solutions for the State of California. Headquartered in Folsom, California, we provide a unique blend of talented team members with on-site collaboration that fosters teamwork and delivers results.

Recent client successes include the launch of the online properties for CalCareers (the California job site for those seeking employment in state service), public-facing websites for the California Highway Patrol and the Governor's Office of Emergency Services, an online cost-calculator for Covered California, and an award-winning mobile application for the California Lottery.

Kiefer Consulting is uniquely positioned to provide services to your organization because we have the experience and expertise. Kiefer staff members have served on the Emerging Technology Advisory Committee, Project Delivery Summit Advisory Committee, and the California Mobile Advisory Committee, and have also led local technical user groups. Kiefer project managers have taught courses for the Project Management Institute (PMI). Kiefer is considered a trusted advisors to numerous state agencies and has been recognized for the successful delivery of innovative solutions for clients throughout California, where our company and entire staff is based.

Kiefer Consulting has been successful in recruiting and retaining highly skilled, locally based individuals by providing challenging projects and opportunities for skills growth, and was a finalist for Sacramento Business Journal's Best Places to Work in 2017.

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