

# SHAREPOINT FOR COMMUNICATORS: FROM PLANNING TO CONTENT



A WHITE PAPER  
BY TOBY WARD



**PRESCIENT**  
DIGITAL MEDIA

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# INTRODUCTION TO SHAREPOINT

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SharePoint is a dominant force in the world of enterprise technology. In fact, it is present in some shape or form in about 80% of all medium to large organizations (and at least that amount in smaller, knowledge worker-based businesses). It's a powerful platform; but without the proper customization and add-ons, it can be hugely frustrating and overly simplistic.

In short, SharePoint is part enterprise content management (ECM) solution, part portal solution, part web development platform, part social media platform and a good portion of a complete digital workplace solution. It offers many, many solutions and functions – often too much for most organizations to grasp – but it is Microsoft's hope that it will become everything to everybody including the *defacto* platform for the company intranet, website(s) and extranet(s). In sum, it is an amazingly powerful solution, but often fails to live up to expectations for key components such as web content management.

*It's the perfect solution, if you have an abundance of time, patience... and money.*

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SharePoint 2019 was unveiled recently with great fanfare and buzz amongst those inside or close to the Microsoft community. To most average users and administrators without insider caché, the new release – three years in the making – was met with little more than a nod. And very few have indicated they will rush to implement. Though those with Office 365 automatically have access to the latest features in SharePoint Online.

SharePoint's greatest strength is its all-in-one approach – it's a portal, a content management system, a search engine, a social collaboration platform, a web development platform, and so much more. Its greatest weakness is that it's an all-in-one solution – everything and the kitchen sink; a jack-of-all-trades, a master of none. Some argue that SharePoint is a “mile wide, but a foot deep.” It offers so much, but some features are perceived as still ‘developing’ or even sub-par. Yet there are a lot of tools and features incorporated and with each release it gets better and better (though more complex).

“With Office 365, Microsoft currently offers the most powerful communication and collaboration suite on the market. And the latest announcements from the Microsoft Ignite conference across the main workloads like SharePoint, Teams and Power Apps prove that they continue to move forward fast in order to stay ahead of the game,” says Antoine Faisandier, CEO of Powell Software, a digital workplace software product that extends and enhances the Office 365 capabilities.

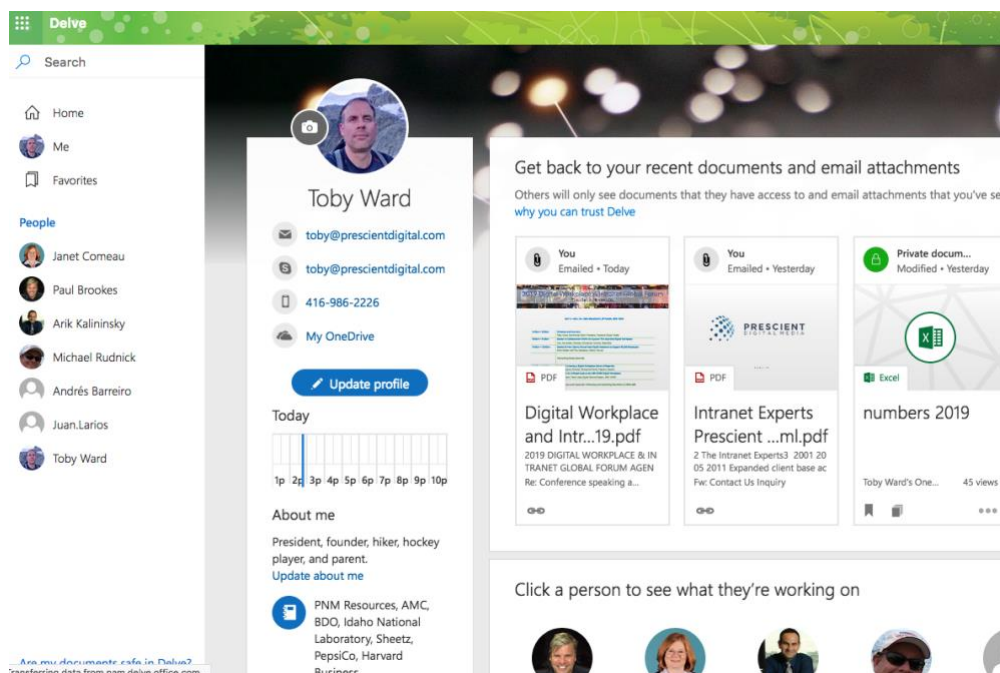
It's important to note that SharePoint is a technology. It doesn't include all the people, process and planning that is required to make any intranet technology work. Intranet technology will fail without careful planning, processes and committed people. Most of the key ingredients of a successful intranet in the digital workplace are based on people and process; technology is merely an enabler.

SharePoint 2016 was released in the Spring of 2016 and builds upon many of the features already introduced in Office 365. Most of SharePoint 2016's new features are behind the scenes from the administrative perspective. Much of the user experience, social and content management experience is untouched (as is the ribbon), with some exceptions.

Among the new features:

- **Delve / My Profile (About Me)** - *My Sites* disappears in favor of a new profile, *About Me*, that also uses the Delve inference engine.
- **Cloud / Hybrid** - Hybrid enables you to integrate your on-premises farm with the cloud, at your own pace.
- **Durable Links** - Resource-based URLs now retain links when documents are renamed or moved in SharePoint.
- **Image and video previews** - Preview images and videos in SharePoint Server 2016 document libraries.
- **Large files** - now supports uploading and downloading files larger than 2,047 MBs
- **Mobile** - an improved mobile navigation experience.
- **Search** - SharePoint search has now fully integrated the FAST Search engine, with more features and indexes for up to 500 million documents (per app).
- **Sharing** - better user sharing options, including a shared folder and invitation email notifications.
- **Microsoft Teams** - social project sites, akin to an enhanced *Team Site*, with chat, online presence, inline calling and messaging, including Skype and other third-party apps. It now includes voice mail.

We are Intranet consultants ([www.PrescientDigital.com](http://www.PrescientDigital.com)) and we principally use Office 365 - SharePoint Online (almost complete feature parity with SharePoint 2016) for enterprise content management—improving the way our organization functions in terms of employee collaboration and knowledge sharing specifically via document management and social collaboration (discussion groups, profiles and blogging being the most used social tools). Increasingly we use *Teams*, and we use it with external clients that can be invited to a specific team.



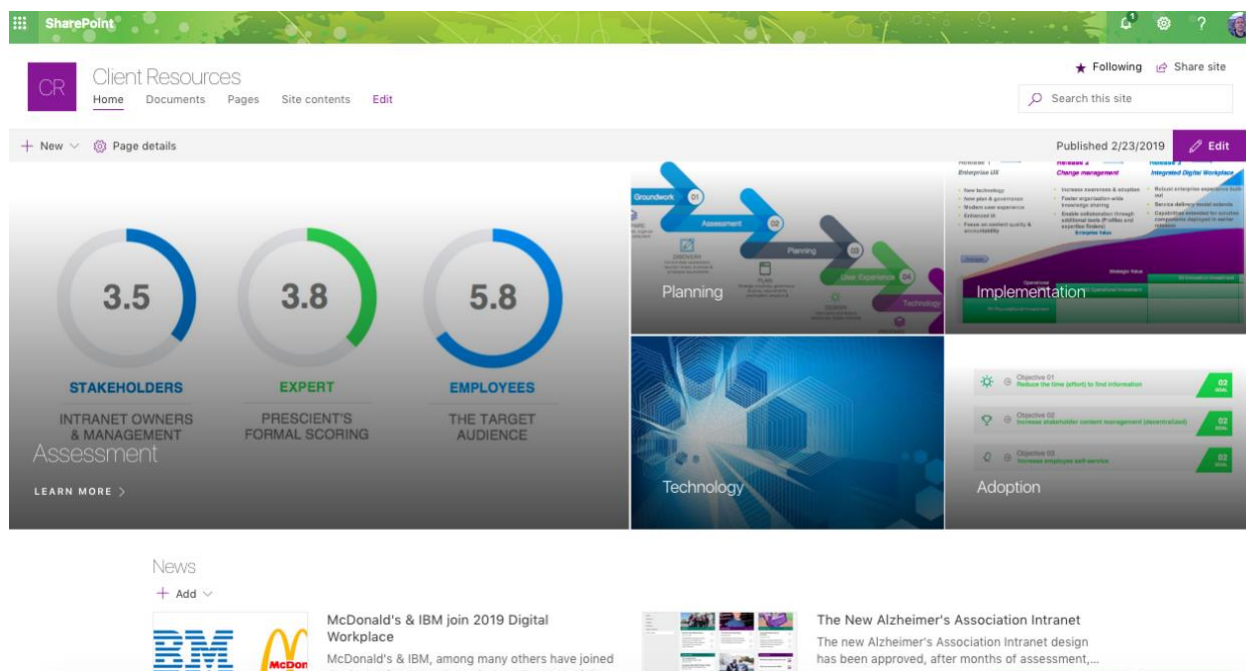
*Microsoft Delve showing My Profile in Office 365*

The solution could use improvement in terms of web content management / social media tools (e.g., wikis) and general usability. We also encountered many, many problems with deployment – customization and implementation requires more work than you might expect. Additionally, like most organizations, we customized the user experience, which can break (particularly specific webparts) with every SharePoint patch and upgrade. However, we found no issues with stability or scalability.

We switched to SharePoint Online because it is the market leader and 80% of our clients use SharePoint. We are first and foremost SharePoint intranet consultants who build and design other intranets, and therefore need to deeply understand the ins and outs of SharePoint.

The initial setup of SharePoint is very complex and requires a lot of work to customize, including hiring outside experts. The advice I would give to others looking into implementing this product is plan, plan, plan and expect to run over-budget (unless you hire very strong outside experts to develop and run your plan and budget) for customization activities. And do not underestimate the infrastructure required (servers and farm configuration) for your chosen solution.

However, using SharePoint out-of-the-box requires almost no set up and can be quickly deployed with a fully mobile responsive site using the ‘modern UX’.



### *The Modern UX of SharePoint, Office 365*

SharePoint 2019 features major upgrades to the user experience design and mobile access, including a new dedicated SharePoint app. The UX for SharePoint 2019 is noticeably superior to previous versions of SP. It's very clean and modern, with a major emphasis on images and video. The new "modern UX" is fully responsive, very clean and deploys quickly. However, it cannot be customized (easily).

***"SharePoint 2019 has the most UX (improvements) than we've ever delivered before in a SharePoint release"***

There are far more pros than cons, and there should be at the price Microsoft charges. The pros are all very good for corporate communicators and internal communications who typically own the 'front-end' or the intranet user experience (UX). It's easy to publish news and corporate content, and easy to update. Creating a truly custom user experience is more tricky and expensive, but easily executed with an experienced .NET development team.

## **MODERN VS CLASSIC**

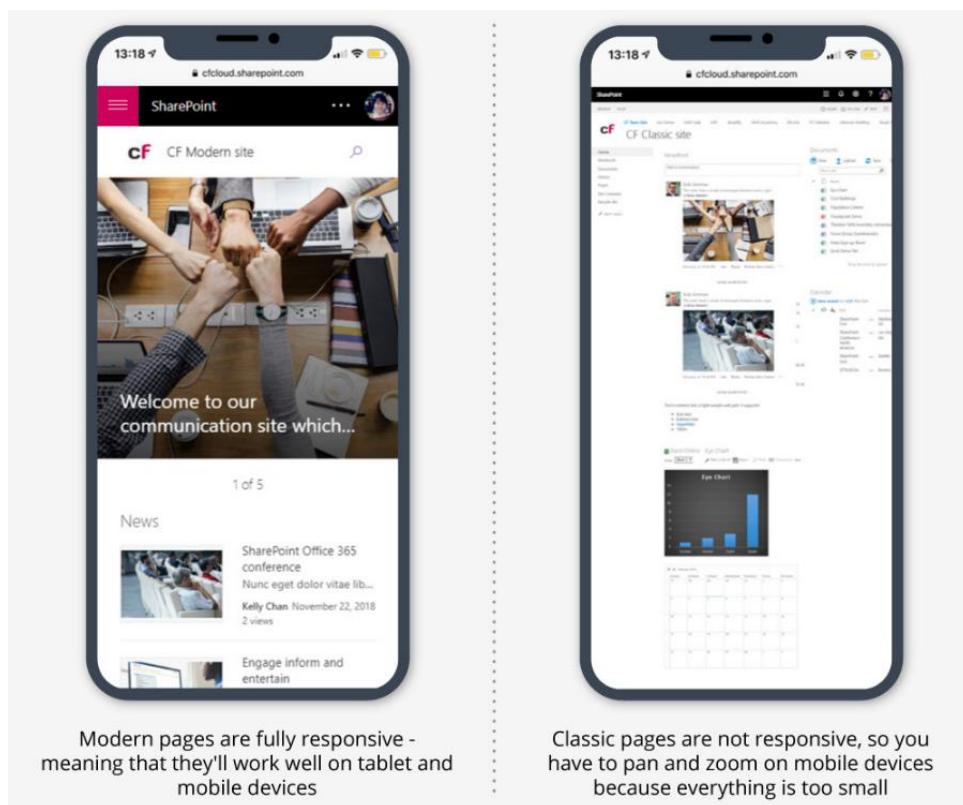
The new 'modern' experience in SharePoint represents the most visible improvement to SharePoint from the corporate communicator's perspective.

"SharePoint 2019 catches up the modern experience that's been available in Office 365 so that organizations that are running internal infrastructure can take advantage of the new modern pages," says Robert Bogue, founder of Thor Projects. "It makes designing responsive sites easier than ever before."



Most of the SharePoint intranet portals that are available today are based on the Classic UX. Office 365 (SharePoint Online) and SharePoint 2019 both offer classic and modern UX.

The standard way of deploying a classic SharePoint site is by developing the custom master page and the page layouts. The modern UX is an out-of-the-box approach where you can choose different templates and color schemes. It deploys fast and the solution is fully mobile responsive with a dedicated mobile app. Modern cannot be truly, fully customized (without problems). Classic can be customized, but is not fully responsive.



*Depicting Modern vs Classic mobile view, by Content Formula*

## CONTENT MANAGEMENT

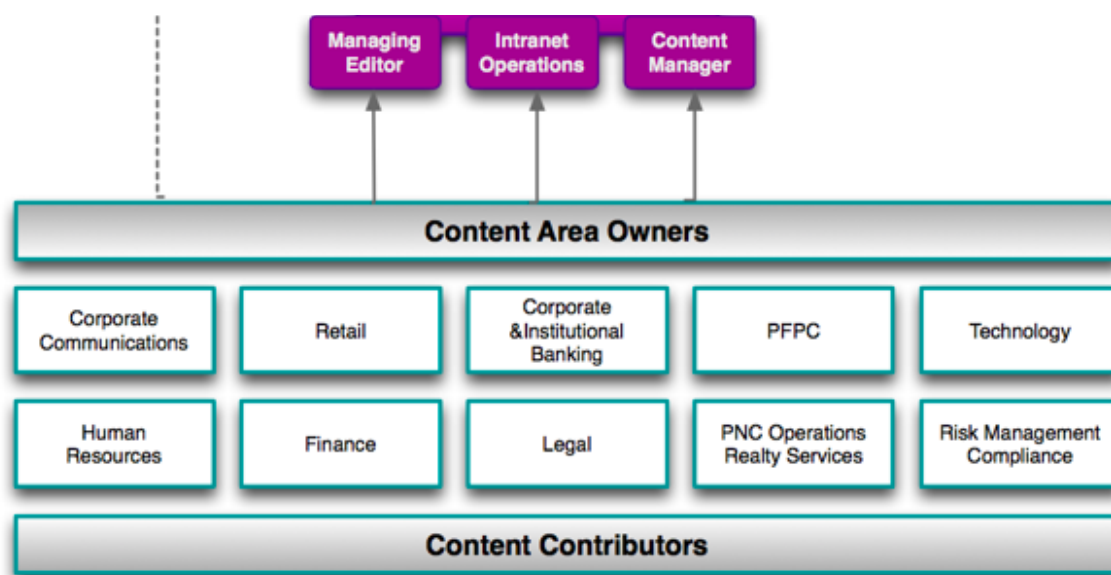
Walls don't work well for communicators in collaborative environments. Although a firewall is a requisite with any intranet, not just a SharePoint intranet, walls kill collaboration and employee collaboration, knowledge management (knowledge sharing) and content management.

For global organizations, like those featured at the annual [Digital Workplace & Intranet Global Forum](#), the key to a communicator's success is breaking down the walls that create functional, geographic and cultural silos. Content management and social tools cannot work in isolation; the digital workplace needs to continually break down barriers and build connections between disparate employee groups.

“Decentralized content management isn’t just a no-brainer, it is a must have for enterprises looking to drive an immersive and connected employee experience,” says David Maffei, President and CRO at Akumina. “The key is to enable an organization to spread content management responsibilities across a wider swath of leaders, contributors and thought leaders.”

Breaking down barriers by spreading the responsibilities and accountabilities across all areas of the enterprise is a key requirement to derive value from SharePoint.

“By managing content through an abstracted system, organizations avoid the hassle of duplicating and recreating content on different pages, templates and sites,” adds Maffei.



“This approach helps to increase the volume and quality of content by having subject matter experts directly involved in content creation rather than funneling it through a communications team. Combine this with content-author accountability around creating content that is useful, sticky and consumable and you start to develop a 360-degree view of what content is needed, what content is required and what content is overflow.”

Content management, regardless of the solution (SharePoint or other), works best when it is decentralized and responsibilities spread across the organization. When content management is consolidated within a single team, like corporate or internal communications, then great value is lost in the process. Content needs to be created and shared across the organization, regardless of how users access the digital workplace.

“The reach of a communicator changes when you’re using Office 365 with modern pages and the new approach to news,” adds Bogue. “Now we can get news to employees even in their mobile SharePoint application. In a world of mobile application experiences, we can now reach in and deliver news where users are.”



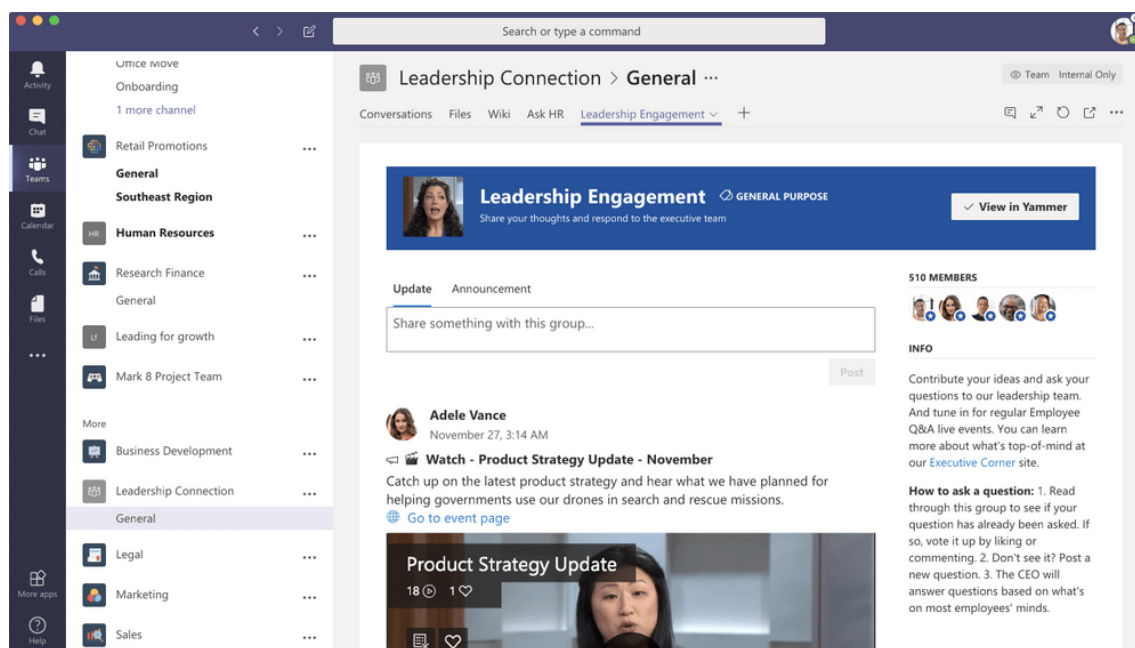
Decentralized content management empowers content owners to not only create their own content, but manage it offline and online, breaking down the silos that separate employees.

## SOCIAL COLLABORATION

The same is true of social collaboration tools. Social works best not when the tools work in isolated silos, but when they are integrated into the home page and other digital tools.

Yammer is still a stand-alone tool that is not easily integrated into other parts of the intranet. There's not even a natural link to it from SharePoint out-of-the-box. Microsoft is slowly learning this lesson the hard way. Finally, years after purchasing the floundering microblogging platform, Yammer has now been integrated into Microsoft Teams. And Teams, with integration into SharePoint, Outlook, Skype, and other Office tools, is becoming the ultimate social collaboration tool on the intranet because it's breaking down these walls.

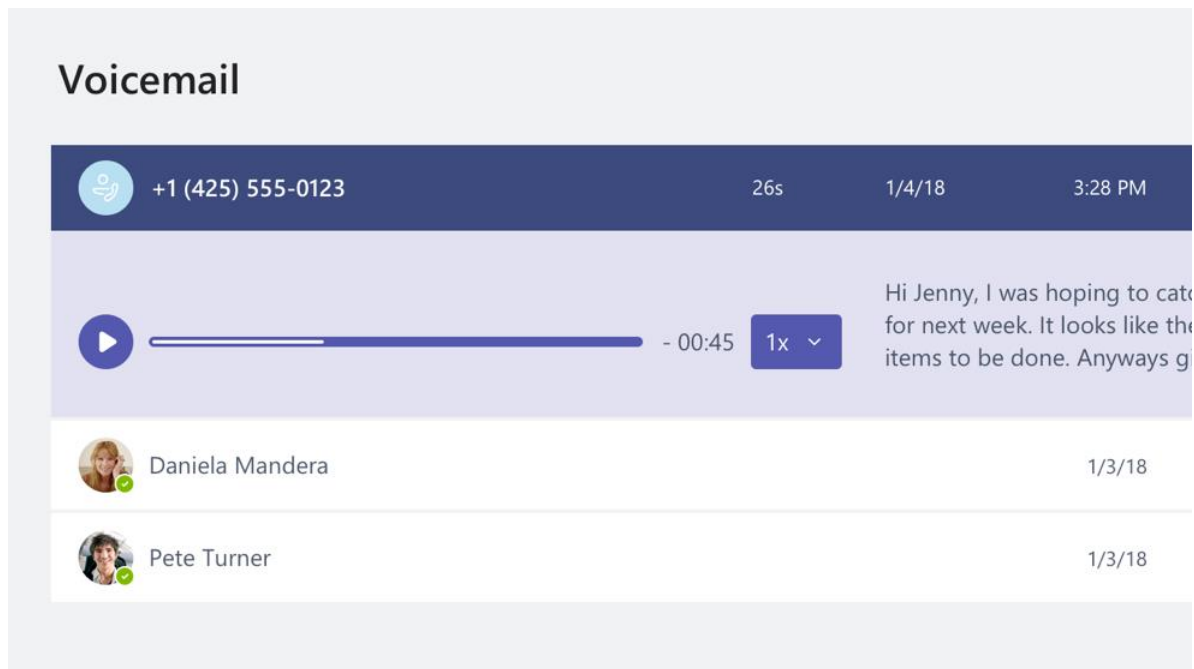
Microsoft Teams is an interesting addition to Office 365; many liken Teams as Redmond's answer to Slack. It's a little more involved than Slack and hardly as cool. It does, however, integrate with SharePoint Online and Skype, and is definitely worth a look if you're already a Microsoft customer. Despite some technology pundit reports, Microsoft Teams is not a replacement for Yammer, but a completely different tool.



*Yammer integration into Teams*

The threaded discussions and file sharing remind the user of Slack, but Teams also comes with traditional SharePoint libraries and wikis. Additionally, within Teams a user can initiate chat or video calls. There are tons of integration points and additions with other third-party tools (we've integrated Asana into Teams for project management) in addition to Yammer.

And now, Microsoft has just announced the integration of voice mail into Teams. Now you can leave voice mail messages with your Teams connections.



Select a voicemail in your list and use the playback controls to listen to the recording or read a transcript (if it's available).

Among the new UX features, particularly noticeable in the new SharePoint *Communications Sites*, are drag-and-drop web parts for image galleries, slideshows, hero slideshow and video. Perfect for communicators, communications sites are deployed in minutes, with a focus on employee news and photos that allow the communicator to cut-and-paste news stories from word and publish live in seconds.

## KEY LESSONS

Walls and social tools aside, there are a few more salient, key lessons that should be emphasized when implementing and working with SharePoint, that all communicators need to understand:

- Licensing represents a fraction of the cost
- Planning and governance are mission critical
- Social collaboration doesn't just happen, adoption is earned
- Content management needs to be decentralized with responsibility spread widely
- Change management is the key to success; employees and content creators need a lot of education and marketing support.

SharePoint is very good for a small to medium-size intranet in a .NET environment that requires a web development platform focused on enterprise content management and search. It can work for a large enterprise, but it is not cheap, typically requiring a lot of work and customization of the "classic" experience and doesn't always work as promised.

SharePoint cannot be everything to everyone, though Microsoft is working hard to make that happen.

## PLANNING

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Communications professionals need to operate with a plan. An intranet must operate from a plan. A failure to plan is a failure to communicate. Without a plan, the intranet will fail.

Like the content of your intranet, planning and governance is technology agnostic. Whether it's SharePoint or another portal or content management platform, the necessity for and the approach to governance is the same. Given its technology-neutral status in the realm of intranet evolution, planning and governance is largely applicable to any technology platform and as such is generic to start. While generic in nature, there are some components of SharePoint that require specific planning consideration. These are discussed and addressed b later in this paper.

As is the case with most intranets, it is simply impossible to achieve any long-lasting success without a clearly defined ownership and management structure. Far from being a buzz word or jargon, intranet governance provides clarity and rules specifically for the titles, roles and responsibilities of its owners, managers, stakeholders and contributors.

*“Without proper architecture and governance, I can guarantee you that SharePoint will fail.”*

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The powerful Teams or *team sites* can be deployed rapidly and can multiply like rabbits without proper rules for creating, archiving and deleting these sites. The more sites, the bigger the burden on the search engine to return relevant results. The more sites, the more content, and the tougher it will be for employees to find what they're looking for.

### NO OWNER

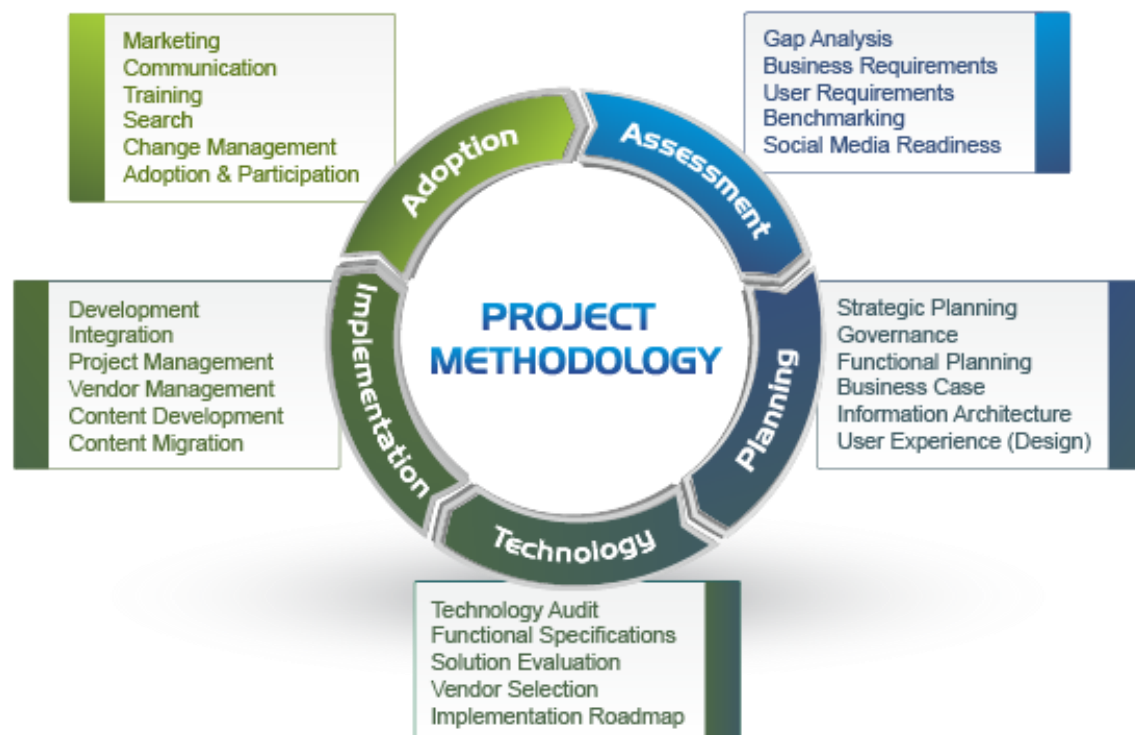
“I'm not really sure who owns the intranet.” This is a far too common refrain cited by many clients and conference attendees when answering questions about intranet ownership. Shockingly, even professional, experienced communicators answer with confusion – sometimes believing that they are at least a part owner, but not certain of even this.

Imagine your newsletter or annual report without an editor, a platoon without a lieutenant, or your IT communications department without an executive in charge. All might survive for a few weeks, maybe a year or two, perhaps, but all would die a slow death until someone put it out of its misery.

How can you operate a successful business or website if there is no clear owner? You cannot; it is simply impossible to achieve any long-lasting success without a clearly defined ownership and management structure. Websites and intranets are no exception, and the powerful team site features and easy

deployment features of SharePoint make it even more critical that they demand a rigorous plan and detailed governance model.

Politics and the issues of control, ownership and standards go hand-in-hand with intranet management and perhaps these issues, more than any other, have driven the requirement for planning and defined governance models – regardless of using SharePoint or another technology solution. Sadly, very few organizations have a well-defined governance model, and many of those have spent hundreds-of-thousands to millions of dollars on their website or intranet – amounting to extraordinary investments left to chance and execution on a whim.



## STRATEGY & PLANNING

Governance is but one component of a larger plan or strategy. A strategy has definition, is well documented, shared by all stakeholders and has key performance indicators (KPIs) or metrics to evaluate effectiveness. The strategy provides direction for executable actions (in the context of this white paper, we will treat strategy as synonymous with planning, though a strategy in the broader definition might contain many plans). For a website or intranet, a typical strategy would include the following elements:

- Vision
- Mission

- Target audience definition / segmentation
- Governance model
- Goals
- Objectives
- Action plans
- KPIs (or CSIs)

Strategy and planning is independent of technology and should precede the selection, architecture and implementation of SharePoint (or any technology). In fact, any choice for or work on technology before the development of plans and governance is synonymous with putting the cart before the horse; except this SharePoint horse is massive and can be very expensive.

Regardless of the technology, most intranets risk failure without a well-defined strategy. Even the smallest of intranets requires a strategy and plan. When it comes to the process of developing or redesigning an intranet, strategy encompasses the first two phases of our Intranet Project Methodology: Assessment & Planning.

## **ASSESSMENT**

During Assessment (Phase I of Prescient's methodology), the current state of the intranet is documented, and the needs and requirements for the intranet are identified. Assessment serves two important functions: documenting the needs and requirements of the user population, and identifying the priorities of the business and its stakeholders (aligning project goals with corporate goals and objectives). This phase often includes the following activities:

- Heuristic intranet evaluation (gap analysis)
- Business requirements analysis (and stakeholder interviews)
- User reviews
- User survey
- Focus groups
- Technical infrastructure analysis
- Benchmarking and best practices.



## PLANNING

Phase II, Planning, addresses the needs documented during the assessment. Intranet planning incorporates the strategic vision, governance model and the functional plan and maps out the strategic and tactical steps for designing the site or portal including:

- High-level vision and mission
- Goals and objectives
- Governance model
- Critical success indicators (KPIs)
- Business case and ROI
- Content management plan & policies.

As well, detailed tactical plans are drafted, including:

- Functional plan
- Information architecture
- Page wireframes
- Design concepts
- Usability testing.

## STRATEGY AND GOVERNANCE

### Intranet Strategy

Critical to the success of any plan is the understanding of the underlying strategy and how a content management policy supports the strategic direction and provides guidance in supporting the intranet mission statement, overarching goals and specific objectives.

### Mission Statement

The mission statement provides the highest level of strategic direction and guidance for the intranet team and states the intranet's purpose. For example, the mission statement might read:

*To support our mission, vision, and values by providing an innovative environment for collaboration, innovation, and interactive communications.*

## Goals & Objectives

Goals are overarching directives that expand upon the direction provided by the mission, and provide guidance for developing specific, measurable objectives. Objectives are S.M.A.R.T (specific, measurable, actionable, realistic, and time-sensitive). For example, sample objectives might include:

- Reduce e-mail volume (from X to Y)
- Increase ROI (by X%)
- Increase employee engagement (as measured by ...)
- Reduce time spent finding information (by X much)

## MODEL FOR SUCCESS

It is easier to look at planning from the top-down, beginning with the vision and visualizing the end state or model of success for the intranet. While a successful intranet looks very different from organization to organization, another way to visualize success is as a model or mental construct (the elements of success).

## THE NEXUS

It is not enough to merely look at a successful intranet and duplicate it for your organization; each organization is unique, has unique requirements, and what works well in one organization will not necessarily work well in another. Adopting a nexus approach helps to identify the most important elements needed to successfully bring people and content together. Nexus ['nEksls] comes from a Greek word meaning 'meeting place' (a fitting label given the intranet's importance as the only true, universal meeting ground or 'water cooler' in the average organization).



The most critical determinant of intranet success is people. In particular, the crucial participation and support of senior management (the heart or inner ring of the Nexus model: Executive Support) and the end users (the all-encompassing factor represented by the outer ring of motivated users of the Nexus model). The model therefore visually depicts the significant importance of people: both senior management and end users are critical factors during the development of intranet plans and governance.

The Nexus model therefore represents the desired end-state, not the process for getting there. The intranet is not a technology system or IT project, nor is it a communications vehicle or channel; the intranet is a business system that should represent and support all areas of the business. In fact, a successful website or intranet is really only one-part technology, and many parts people and process (beginning with strategy).

## GOVERNANCE

Governance defines the ownership and management model including:

- Management team
- Roles & responsibilities
- Decision making process
- Policies & standards
- Governance model

In short, governance supports or directs the content management initiative by putting in place rules and accountabilities (roles and responsibilities). This is the crux of feeding and caring for the intranet beast – rules are required and those creating content must thoroughly understand the details and their responsibilities.

Despite the need, SharePoint is not getting the planning and governance it deserves. According to the [Global Intranet Trends report](#), which reports detailed intranet data and findings from 227 participant organizations, most organizations have SharePoint (in some shape or form), but a pitiful 30% of those SharePoint implementers have an intranet strategy (including governance).

One SharePoint expert, who prefers to remain anonymous when citing this particular client, tells of a major bank in the U.K. that deployed SharePoint. A little more than a year later the bank had 23,000 SharePoint sites – a massive problem for the bank. “The way it was deployed and structured was deplorable... but that’s the bank’s fault, not Microsoft’s.”

Imagine the effectiveness of your intranet and search engine if users had to navigate 23,000 SharePoint sites, and search results from hundreds of thousands of pages?

An intranet cannot operate on software and hardware alone. More specifically, Microsoft provides the software, but it is the client's responsibility to build the plan and implement intranet governance.

When building a governance model for SharePoint, the major components should include:

- The umbrella ownership model – Centralized? Decentralized? Collaborative?
- Defined ownership structure (names and titles)
- Roles and responsibilities (jobs and duties)
- Decision making process (who is responsible for what and when)
- Content and development policies & standards (the rules of establishing pages, sites and content).

Politics and the issues of control, ownership and standards go hand-in-hand with an intranet. Sadly, very few organizations actually have a well-defined governance model, and many of those have spent hundreds-of-thousands or millions of dollars on their intranet – amounting to extraordinary investments left to chance.

## **OWNERSHIP**

Politics will kill your intranet. Without a well-defined governance model (and should your intranet survive the naturally occurring politics of competing priorities amongst various stakeholders – communications, IT, human resources, various business units, etc.) then the value the intranet or portal delivers will be severely hampered or trampled.

“If you don’t have structure, you’re going to constantly run into politics,” said Terry Lister, Partner and Leader of IBM Canada’s Business Consulting Services. “Without a governance structure with standards, different silos try to do something in parallel (their own thing) and it costs more... and will lessen the user experience.”

Much of the problem lies in the immaturity of this nascent intranet technology, and the lack of foreseen and required planning to accompany it. With the rational consolidation of intranet sites and services under a central site or portal, disparate departments and stakeholders such as corporate communications, human resources, IT and varying business units now must cooperate under a lone umbrella with a single intranet home page. Along with this ‘forced’ cooperation comes the predictable politics and competition for ownership of the intranet (and competition for valued home page real estate). Or worse, they don’t cooperate at all and go off and create their own intranet, investing and paying for separate technology, maintenance and staff.

The problem lies with the traditional growth and evolution of the intranet. Initially, when intranets first appeared in the early to mid-1990s, they were nothing more than a web brochure (a.k.a. brochureware) managed by a web developer who served as designer, writer and webmaster.

## INTRANET SPRAWL

As the technology grew up alongside its richer and more popular Internet brethren, corporate intranets evolved to include human resource and purchasing applications, collaboration tools, business intelligence and real-time reporting tools. Soon every department in the company had an intranet of its own, thus giving birth to 'intranet sprawl'.

Intranet sprawl is a toxic side-effect of SharePoint team sites. Left unchecked, site collections proliferate without the proper rules for deploying and managing these viral sites. It's not merely a SharePoint problem. Before the turn of the millennium, IBM's network was choked with approximately 10,000 intranet sites before they undertook a governance process and federation (consolidation campaign) that closed more than 6,000 intranet sites, saving the company untold millions (IBM claims it's saved more than a \$1 billion).

"It's ironic," adds Lister, "we wouldn't have these difficulties in a building where you have different groups existing together in the same space. But partly because of the way the intranet grew up, we didn't create a corporate view and you have to struggle to pull the intranet back and find something better."

Prescient Digital Media has identified four broad governance approaches or models:

- Decentralized (no single owner; do-what-you-like)
- Centralized (a single owner or department controls it all; highly bureaucratic; common in small organizations)
- Collaborative (shared ownership via committee)
- Hybrid, centralized (single owner, with collaborative accountability, decentralized content ownership).

**For more on SharePoint Governance, see the [SharePoint Governance white paper](http://www.PrescientDigital.com/Downloads) ([www.PrescientDigital.com/Downloads](http://www.PrescientDigital.com/Downloads))**

# SHAREPOINT INTRANET CASE STUDY: 3M

Global science company, 3M, applies science in collaborative ways to improve lives. The creator of the Post-It-Note built their new intranet using SharePoint Online in Office 365. More than 100,000 employees and users, including scientists, researchers and marketers use the new intranet, called *3M Go*.

The screenshot displays the 3M Go intranet homepage. At the top, there's a navigation bar with the 3M logo and 'Go' text, a search bar, and a user profile icon. Below the navigation bar, the main content area is divided into several sections:

- Featured News:** Includes a circular badge for 'Intranet Design Annual 2019 WINNER NN/g', a list of news items like 'Earthquakes don't shake us!', '3M Go named one of the world's top 10 intranets', and 'It's time to take your health assessment'.
- Upcoming Events:** A calendar view showing events for January 15th, 16th, and 17th, such as 'Office 365 Power Hour: Make Your Point with PowerPoint' and 'Tuesday Take-Home Meals: Shrimp or Chicken Pad Thai'.
- Company News:** A section with three news items, each with a photo and a brief description, dated January 10th, 14th, and 12th.
- My News:** A section with six news items, each with a photo and a brief description, dated January 11th, 9th, 7th, 6th, 4th, and 3rd.
- Popular 3M Go Sites:** A grid of 12 site tiles with icons and labels: PAY, BENEFITS & RETIREMENT; CAREER & DEVELOPMENT; INFORMATION TECHNOLOGY; TRAVEL & EXPENSE; ENVIRONMENT, HEALTH & SAFETY; LIBRARY PORTAL (ATLAS); POLICIES; ETHICS & COMPLIANCE; DIGITAL WORKPLACE (3M GO); SOURCING & SUPPLIERS; BUSINESS TRANSFORMATION; and LEGAL.
- My Delve Profile:** A section showing a user's profile completion status (100% Complete) and a 'GOOD JOB!' message, with an 'IMPROVE PROFILE' button.
- 3M Organizations:** A section listing various organizational units under the heading 'Business Transformation & Information Technology', including Aviation, Business Transformation & IT, APAC, ERP Solution & Optimization, Facilities & Services, Global Service Centers, Business Transformation, Global Service Delivery & BT, Americas, Information Technology, and Organizational Change Management.
- Get to Know 3M Go:** A section with a brief introduction and a 'Tools' section showing a list of available tools.

At the bottom of the page, there's a footer with the 3M logo, copyright information, and a stock price ticker for MMM (NYSE) at 192.21 USD, up 1.39 (0.72%).



3M Go connects more than 121,000 users in 70 countries with 15 different languages. Features include:

- a tools directory
- a customizable toolbar
- enhanced, advanced search
- mobile access
- targeted, personalized content.

The intranet was built based on findings and user research from more than 4,500 employees. In the process, 3M unplugged more than 20 disparate intranet systems that were frustrating its massive, global user base. The research process took three months; the complete redesign process took two years.

The success of the new global intranet has not gone unnoticed, winning two global intranet awards. In 2018, 3M Go was recognized with the Gold Award from Step Two in the *Intranet Essentials* category. The award focused on the insight, execution and impact of digital workplace sites and awarded 3M Go based on its “attractive, personalized global intranet based on extensive user research” that “delivers effective communications, improved search, multi-language content and more to over 100,000 employees and contingent workers across the world.”

3M Go was also a winner of the 2019 Intranet Design Annual Award from the Nielsen Norman Group. The Nielsen Norman Group offered high praise for the innovative intranet:

*“It should be no surprise that a company with such a rich history of innovation, including the creation of the original Post-It Note, could also conquer the challenge of creating a truly global intranet. The 3M case study humbly reminds us that even a complicated organization can deftly design an attractive and easy-to-use intranet that entices its users to keep coming back for more.”*

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The toolbar appears on every page and is customizable by the end user. Employees can customize their favorite top 10 sites, destinations or pages. A *See All Favorites* link shows more favorites, and lets users drag and drop to reorder, add or delete sites.

*Preferences* provides a hybrid between traditional personalization and customizable features. Users select preferences based on language, location and type of content, and the type of news they want featured in the *My News* webpart.

A *Submit News* form encourages anyone in the organization to create and submit news for publication to the home page.

## CONTENT MANAGEMENT

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Content is still king. Especially on the intranet.

Too many communicators are overly obsessed with design and look-and-feel; communicators must instead be obsessed with content and content quality.

It used to be said that feeding the intranet was akin to feeding a monster - scary, insatiable and growing at a rate exponentially faster than the biggest teenager.

Today, particularly with the advent and popularity of social media and SharePoint team sites (or the new Teams), our ability to create content easily outstrips our ability to easily manage and retrieve it.

Content management is the means by which content is created, stored, accessed, and reused. It's part people and process, and part technology. People create and manage the content, and process guides the creation and publishing process, while the SharePoint technology renders it live on the intranet.

Effective content management requires:

- organizational processes and rules
- motivated and active content providers, writers and editors
- appropriate technology solutions to support the content process and workflow
- users engaged with the site's content.

A content management plan provides details and guidelines for content requirements, roles and responsibilities, formatting and writing, organizational processes and rules. An effective content management plan is an essential component in supporting strong information architecture and effective, timely, and relevant content for employees. It helps ensure that content is easily found by site users and is easily updated according to the organization's standards.

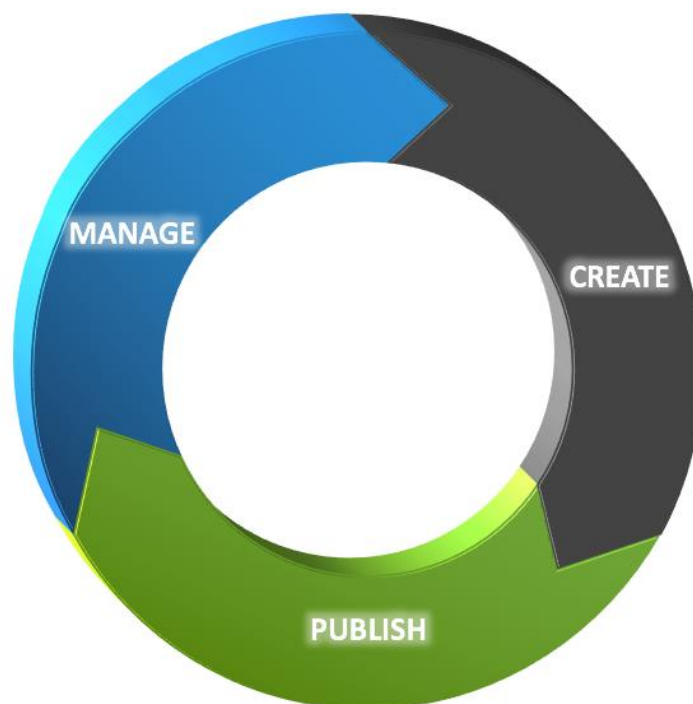
A detailed content management plan provides details on:

- **Assessment:** of current content and processes.
- **Creation:** of detailed information architecture and wireframes, taxonomy, metadata, workflow and documentation including policies.
- **Managing Content:** repurposing, rewriting, creating, maintaining, monitoring, and archiving.
- **Publishing Content:** rules for formatting, publishing, archiving and deleting content.

- **Maintenance:** storing, accessing, reusing/repurposing and resourcing.
- **Measurement & Growth:** measuring and analyzing for growth.
- **Writing:** writing and formatting for the intranet.

## CONTENT MANAGEMENT LIFECYCLE

There are many ways to define and depict the lifecycle for creating and managing content on the intranet. The most simple, usable depiction for the average content author and publisher is one that illustrates the three key components:



*Content Management Lifecycle*

### Create

To plan, write and approve content for the intranet.

### Publish

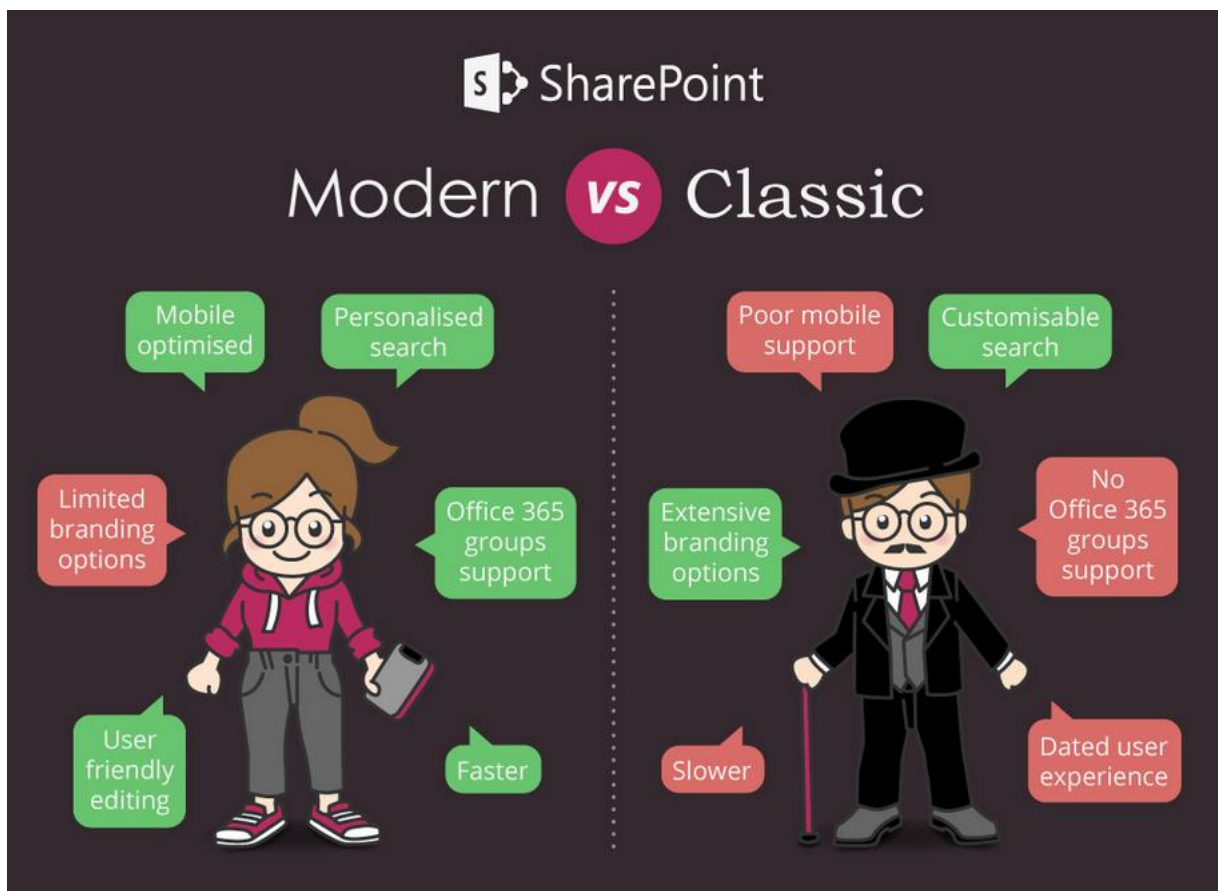
To input content into a template (SharePoint), add keywords and metadata, and add version and other controls to ensure the content can be controlled in the future.

## Manage

To allow all users to access the content, and to allow content owners to control it, review it as necessary, and to eventually archive and/or delete the content.

## PUBLISHING SITE VERSUS COMMUNICATIONS SITE

The choice of deploying SharePoint 'modern' or 'classic' will determine the type of design and of course the type of publishing editor available to the user.



The traditional 'classic' approach has the communicator opting for a custom designed and implemented intranet and most communicators use a *Publishing Site*. While not mobile friendly like the quickly deployed and pre-designed template approach used by the 'modern' experience, developers must code and develop the custom master pages that include writing HTML/CSS and designing page layouts with SharePoint Designer. The *Publishing Site* therefore is purely custom, designed exactly how the owner wants the pages to look.

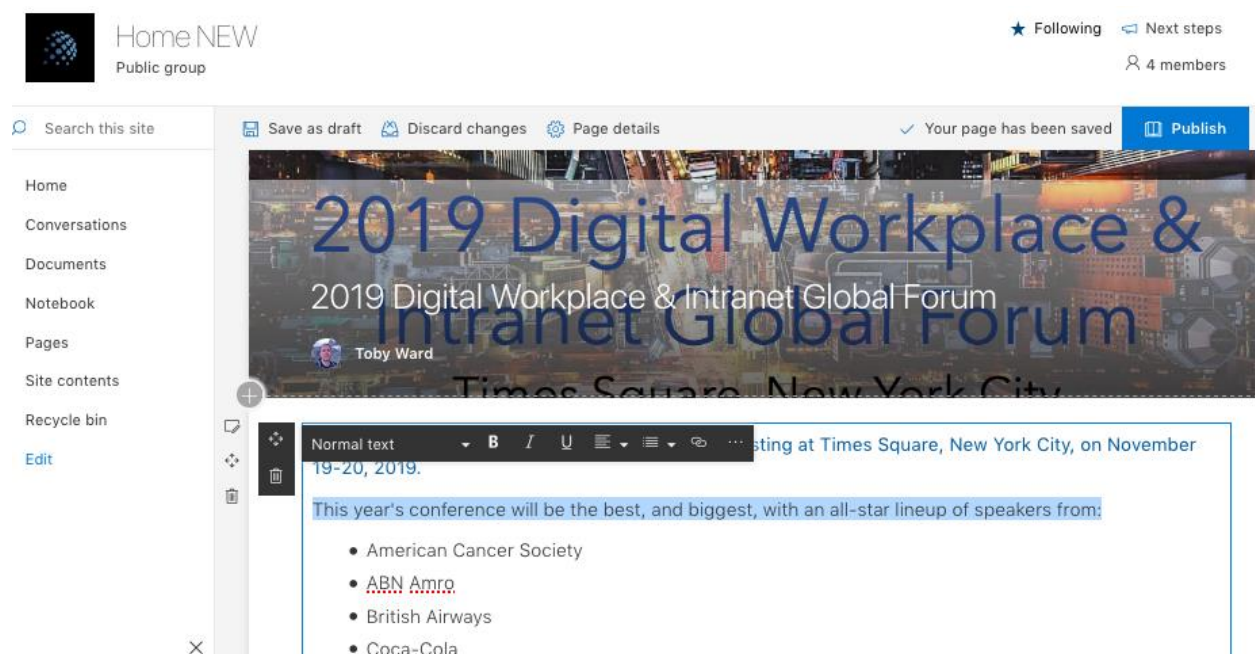
The new 'modern' approach uses pre-designed templates, that allow very little customization, limited to the logo in the upper left-hand corner and the color themes of the sites. Page formatting is strictly

limited in the template, but the new pages are very mobile friendly and can be viewed in the SharePoint app or native browsers of phones or tablets.

## Publishing Editor

In the SharePoint 'classic' user experience (UX), the publishing editor uses the 'ribbon' that most MS-Office users are familiar with. Administrators can create pages via the publishing interface and follow the wizard input fields to complete the process.

With the modern UX, the publishing process and controls are far more-streamlined and users edit news in the page, without opening the ribbon or going into a template wizard.



### *Modern UX, publishing controls*

Publishers can create several types of pages, but the most common for communicators are:

- **Structured pages** – used for storing structured data in separate fields that can be displayed on other pages. A typical use for structured pages is displaying lists of items such as news or products on a single page.
- **Pages** (menu item) – used for displaying unstructured content in the form of editable regions.

These pages are displayed in the menu of the site by default and can be edited on the *Page* tab.

The CMS provides formatting features such as bullet points, tables and pre-defined CSS styles, while users can also insert images and videos, and create links to internal or external content.

## CONTENT MANAGEMENT SYSTEM (CMS)

When most communications pros think of content management, they think about the technology and the content management system (CMS). In reality, the biggest part of content management is governance, people and process; content management comes to life using a CMS, where the proverbial rubber-hits-the-road.

The hallmarks of an effective CMS include WYSIWIG (what-you-see-is-what-you-get) editing and publishing, format management, version and expiration controls, and pre-formatted templates that manage and control the user experience so the communicator need only focus on the content and words themselves. Of course, intranet content includes text and embedded graphics, photos, video, audio, maps and program code (such as for applications) that displays content or interacts with the user.

Content contributors and authors can copy content from Word, paste it directly into a publishing template and content editor, or an HTML field control on a page, and have the resulting semantically-correct HTML markup display in the styles that were defined by the master page (e.g., same fonts, sizes, colors for headline, sub-headers, body text, bylines, photo cutline, etc.).

### CMS Templates

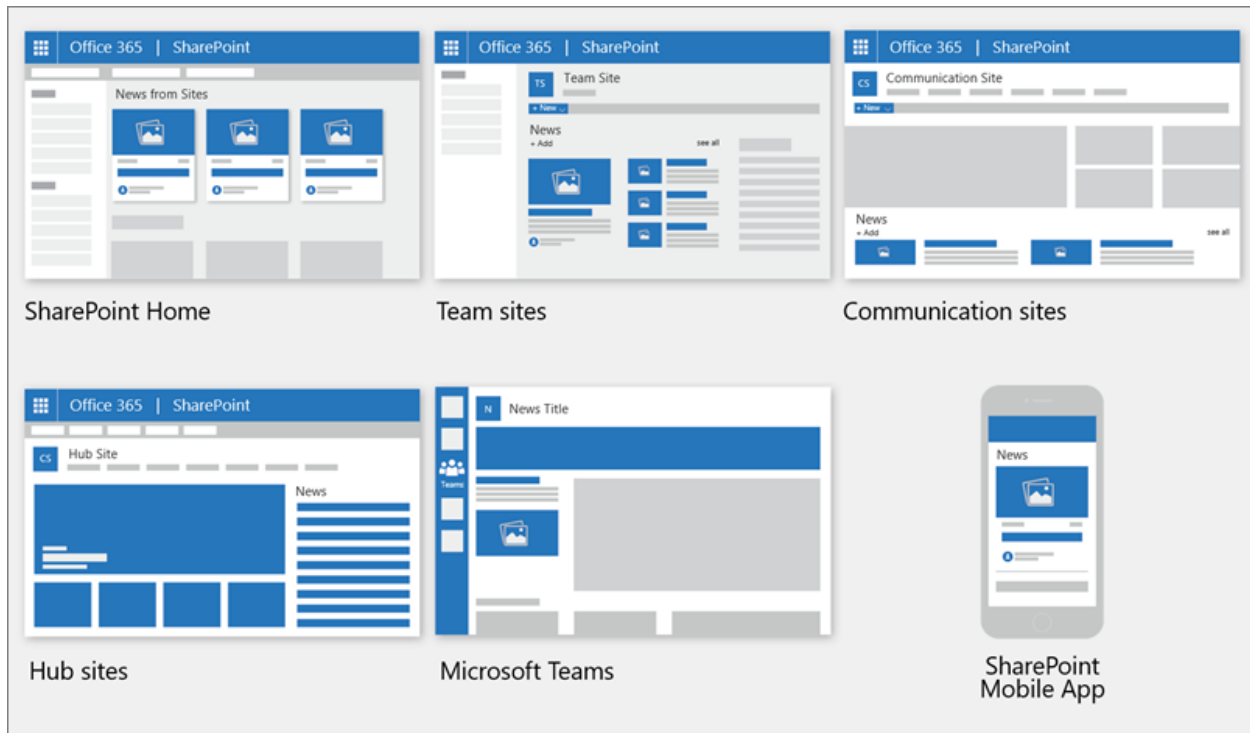
Each content type will have a corresponding template. In SharePoint classic, templates will need to be built for all page types within the CMS with standardized layout and design elements. Examples of templates include:

- home page
- main (parent) category landing page
- sub-category (child) landing page
- general content page
- news story
- directory listing
- calendar
- event
- division / department
- form
- policy
- program



- blog
- discussion forum.

These templates can be created using SharePoint Designer, and deployed into any number of different SharePoint type sites including Publishing, Team, Communications or Hub Sites.



## Link Management

The CMS automatically takes care of links, so if a page is renamed or moved, it remembers the original address and you don't have to update the link. The WYSIWYG editor automatically fixes the HTML, so that it produces valid code.

## MULTIMEDIA

The CMS allows a user to insert images easily, directly from a computer - just click the image button and choose the image on your disk. Once an image is inserted into the text, the user can resize it while preserving the aspect ratio. The CMS can automatically resize the image to a predetermined or required size. In addition to images, users can also insert videos and music files. The editor will support the insertion of online forms, rating buttons, polls and custom controls. Users can easily create links to the new pages or department / field sites, images or multimedia files.

In SharePoint content publishers can embed dynamic content from other sites, such as videos or map directions. For videos, thumbnail preview images are generally created automatically when a video is

uploaded to an asset library and content authors can choose a frame from the video and use that as the thumbnail preview image.

Publishers can also enable image renditions allowing the user to display different-sized versions of an image on different pages. When you create an image rendition, you specify the width and height for all images that use that image rendition. For example, if the site has a news article page layout that contains an image field, you can create an image rendition named `Article_image` to display the full-sized image in the article page. A second image rendition named `Thumbnail_small` can be used to display a smaller version of the image associated with an article when the image is displayed in a web part that lists all recent news articles on the site home page.

Users can create accessible content and easily add ALT attributes to images and links through the user interface.

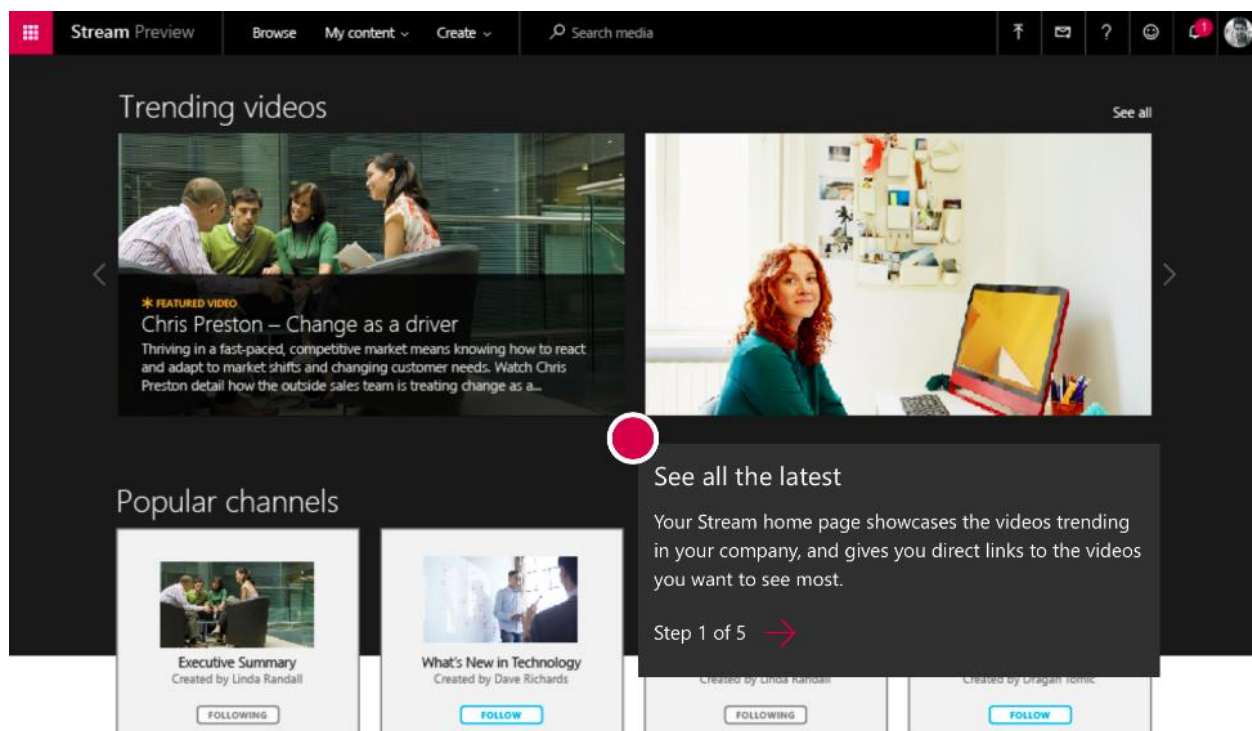
## VIDEOS

Microsoft Stream is an enterprise video service where communicators can easily publish and manage videos as well as upload, view and share videos securely. You can share recordings of town halls, meetings, presentations, training sessions or other employee videos that promote different offices, groups or initiatives. Microsoft Stream also makes it easy to share comments on a video, tag timecodes in comments and descriptions to refer to specific points in a video to discuss with colleagues.

Microsoft Stream is a secure video service so you can manage who views your video content and determine how widely to share within your organization. Secure application access is enabled by Azure Active Directory, a recognized leader in identity management systems, to protect sensitive corporate content.

Microsoft Stream also helps you organize content into *Channels* and *Groups* so video content is easier to find. Microsoft Stream works well with other Office 365 apps like Teams, SharePoint, OneNote, and Yammer, giving even more ways to discover more relevant content.

Microsoft Stream is ultimately the successor of the legacy video solution, Office 365 Video. Office 365 Video still exists for on-premises solutions, but Stream has become the *de facto* video tool for SharePoint 2019 and Office 365. Office 365 Video will still get new features and enhancements and will continue to be supported by Microsoft.



Microsoft Stream is designed to be more intuitive and easier to use. The features and capabilities will be very similar to O365 Video and most of the same permissions and governance functions available with Office 365 Video will be available in Microsoft Stream.

## SPECIFIC SHAREPOINT CONSIDERATIONS

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“SharePoint is a non-linear technology, not a traditional technology, and does not build out in a straight line; it builds out in a tree... or in a cloud,” says Mark Schneider, President VitalSkill, and a SharePoint writer and speaker at [www.SharePointPlan.com](http://www.SharePointPlan.com).

*Site Collections* and *Team Sites* are very easy to deploy, in seconds, and it is easy for even the most neophyte web users to create a site (e.g., Team Sites, Teams, Publishing Sites, etc.). Be aware that SharePoint sites can easily grow at exponential rates and can grow to tens-of-thousands in a short period of time.

“I use the term viral growth,” adds Schneider. “It's very easy for people to create sites and forget that they've done so. And it is also very easy for sites to proliferate... and for people to lose track of where everything is.”

However, as most communicators attached to their intranet can attest, the number one intranet complaint of most employees is: “I can't find anything!” This issue can be greatly exacerbated in a SharePoint environment, without the proper planning and governance.

“If there's no structure to it, the ad-hoc growth winds up becoming unmanageable,” says Mark. “One client, for example, set up a SharePoint pilot, and with just a few employees, it spiraled to more than 10,000 sites. But with a few process improvements and governance we were able to prevent that from happening in the future.”

*SharePoint sites can easily grow at exponential rates and amount to tens-of-thousands in a short period of time.*

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When considering SharePoint, and before it's implemented, SharePoint expert and Microsoft consultant Joel Olesen recommends following his “10 Steps To Ensure Success” in deploying SharePoint (see his presentation [From Chaos to Success in 10 Steps](#)):

- Confront reality
- Create a governance plan
- Get an executive sponsor
- Develop the dream team
- Build services not stuff
- Define clear policies and standards

- Invest in scalable information architecture
- Don't forget change management
- Adoption is what counts
- Keep it simple stupid.

## SHAREPOINT GOVERNANCE CASE STUDY: TRANSFIELD SERVICES

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Transfield Services, a global services firm headquartered in Australia, is one of the Gold Winners of the [Intranet Innovation Awards](http://www.steptwo.com.au/iia) ([www.steptwo.com.au/iia](http://www.steptwo.com.au/iia)). Using SharePoint, the innovative Transfield team created a very simple, but creative approach to deploying *Team Sites* inside the company of 28,000 employees.<sup>1</sup>

Labeled *Team Sites in a Box* the approach opened up the SharePoint collaboration features to Transfield employees with the proper governance and rules that ensured *Team Sites* were embraced but not abused by employees. The *Team Sites in a Box* framework comprises:


- System design
- Configuration
- Support
- Processes
- Policies
- Content
- Training
- People (roles and responsibilities).

*Team Sites in a Box* was driven by the development of a governance plan that defined the applicable terms of use, policies, roles and responsibilities, security and access permissions, etc.

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<sup>1</sup> Intranet Innovation Awards Report, Step Two Designs, 2008 [www.steptwo.com.au](http://www.steptwo.com.au)




**transnet**  
 connect | communicate | collaborate

My Links | Site Map | Feedback | Help | Welcome Reader, Moss

All Sites

[Home](#) | [Our Business](#) | [Services](#) | [Industries](#) | [Regions](#) | [Document Centre](#) | [Team Sites](#) | [TransApps](#)

TransNet > Team Sites > When to Use a Team Site

**Team Sites**

- Team Site Requests
- Knowledge Networks
- Team Sites Directories
- When to Use a Team Site
- What to Use a Site For
- Team Site Checklist

## When to Use a Team Site

### Sharing information in TransNet - Intranet vs Team Sites

If you're not sure whether your information should be shared in the Intranet or in a Team Site, take a look at this [Quick Reference Guide](#) to learn more. A series of questions, with example scenarios, will help you clarify the best approach to take to your communication and collaboration needs.

### How a Team Site can help your team work more effectively


Team Sites can be very useful in the right circumstances. But they won't necessarily help all teams, or assist in every situation.

A Team Site is only really effective if its members have common objectives and are prepared to use it on a regular basis as a platform for team communications. It's also important to recognise that a Team Site will not just "take care of itself", but will require some effort to set up and maintain.

The following scenarios will give you an idea of when (and why) establishing a Team Site for your team or work group could be of use – and when it probably won't be.

#### When a Team Site can help:

- Members of the project team or work group are spread out over two or more locations and you need a single, convenient place to store your common information.
- You're working on a document with several colleagues and, with so many versions and comments being emailed around, it's increasingly difficult to keep track of updates and maintain one master copy. Publishing the document in a Team Site will allow everyone to review and update just one copy ("version control" allows you to keep a record of changes too, if you need to).
- Some members of the project team aren't permanent Transfield Services employees and don't have access to our network, but still need to share common information with us and contribute to items being drafted.
- Members of the team are operating in different time zones, making it difficult to communicate as a group in "real time" by phone or video-conference.
- The team or work group is collaborating quite well by telephone and email, but it can be hard to keep everyone "in the loop" in this way. Members would like to be able to



Five key steps comprise the process of developing this reusable, standardize framework:

- **Anticipate** - anticipating the 'how, when, who and why' questions that users will have during their first encounter with the new collaboration system and preparing the environment accordingly.
- **Educate** - educating and inspiring users and champions for the online collaboration service and, importantly, emphatically addressing the "what's in it for me?"
- 1. **Establish** - establishing new sites efficiently and effectively, including an online request form that captures ownership details, anticipated use and other key metadata, and feeds into the site directory and supports ongoing auditing of the environment.
- **Enhance** - enhancing the user experience throughout the team site life cycle, including extensive team site FAQs, video tutorials (developed in-house, for customized guidance) and how-to materials on key topics.
- **Extract** – realizing benefits – extracting the value created along the chain of components in *Team Sites in a Box*.

The comprehensive methodology delivers end-to-end support for users including training materials, frequently asked questions, video training and more. The solution has been so successful that in a company of nearly 30,000 employees, *Team Sites* have been contained to just a few hundred instances.

Extensive training materials are written in plain language and all are available on the intranet, accompanied by short training videos. Information is provided in bite-size chunks, with links to more in-depth materials where required, and to third-party training materials and books. Transfield created custom documentation and training materials to match the specific functionality available only at Transfield (the team only enacted 20% of the *Team Site* functionality).

To establish a *Team Site*, a business owner / user goes to the *Team Sites* tab, one of the seven major content tabs in the Transfield intranet global navigation. There a user can:

- Request a *Team Site*
- Learn “when” and “what” to use a team site for
- Read the *Quick Reference Guide*
- Review the *Team Site* user guidelines
- Follow the *Team Site* checklist for establishing a new site
- Enroll in a *Team Site* workshop
- Watch a *Team Site* video tutorial
- Follow a *Team Site* user tour
- Browse other *Team Sites*.

## POLICIES & STANDARDS

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Supporting the governance ownership model should be an overarching policy, or a collection of complementary intranet policies, for creating and managing pages (sites), content and applications. This could be a single intranet governance policy or several policies for:

- Content and tools
- Design and layout
- Terms of use (terms & conditions or “disclaimers”)
- Taxonomy (labeling or tagging content).

In some instances, the policy may be limited to a simple 10 item *Terms & Conditions* policy or the policy (policies) may be more detailed, depending on the cultural demands of the organization and the nature of the SharePoint implementation (e.g., what controls are “baked” into the portal set-up, including security, workflow, and available functionality).

### CONTENT POLICY

The website or intranet content policy (sometimes called an editorial policy) should dictate the rules or guidelines for writing, formatting and publishing content. Content policy is less of a legal security blanket and more of a definition of roles and responsibilities for those developing and maintaining online content. The content or editorial policy should include details on...

- Content types
- Style acceptability (e.g., writing for the web)
- News determinants (e.g. currency, impact, etc.)
- Formatting (e.g., use of pictures, fonts, etc.)
- Archiving (e.g., when content should be reviewed, archived and/or deleted)
- Photo treatments and bylines
- Content management system rules and directions
- Governance roles and responsibilities
- Taxonomy (classification)
- Site registration and indexing.

It should be underscored that the content policy should not only cover static content but also dynamic content (delivered from a database or another source) as well as tools / applications.

## TERMS OF USE

Terms of use is a standard legal disclaimer(s) that dictates what intranet users can and cannot do. It identifies who owns the site, declares the copyright, disclaims accuracy of content, etc., and should include information on or links to the organization's privacy and security policies (just about every company has them already), as well as the employee code of conduct and social media guidelines.

Terms of use should also clarify acceptable use of the intranet and other content and tools that may be used to transmit or convey information from your intranet or website. It should include the typical "thou shall not..." statements as noted in the following examples:

- Email content outside of the company
- Print and distribute content outside of the company
- Release content to any media outlet
- Rewrite or reproduce content for personal purposes or profit without the expressed written consent of the company (legal department).

## TAXONOMY

After spending the time understanding what the company needs to achieve with SharePoint, and what business managers and end employees expect, Schneider recommends building a role or policy taxonomy (not a standard taxonomy of nouns, but a grouping of overarching content categories or buckets (often called "parents") that all sites have to fall under).

"Build a policy taxonomy that groups information into big buckets – no more than seven buckets (e.g. Finance, HR, News, etc.)," recommends Schneider. "Come up with a way of describing different types of information, while forgetting about SharePoint. Take a technology-agnostic approach."

Once developed, the seven key buckets (Prescient recommends five to eight parent categories depending on company size and industry) become site collections that other sites must reside under. The properties are set for each of those bucket categories which are then transferred to or 'inherited' by all other sites created under the bucket site collections. This process of inheritance ensures that all sub-sites under a site collection inherit all of the security characteristics (and functions) of the original site collection (and also prevents people from doing things they're not supposed to do).

"You use a combination of policies, inheritance, and templates to prevent people from wandering off (and doing whatever they want)," says Schneider.

Once you've established a taxonomy with the major parent or seven to eight buckets or *Site Collections*, accountability becomes tantamount to success: “Establish a governance team, where each bucket has a business owner (not IT, but a business team),” stresses Schneider. “Then create a governance team of these owners to determine over-arching policies. For example, whomever owns the Finance domain or bucket, then applies the rules to all sites under that domain (site collection).”

Additionally, another check and balance is establishing site quotas. The quota is a storage limit (for example 500 GBs) that restricts how much information can be stored on the site. With the overarching taxonomy complete, the parent site collections in place, and templates, inheritance and quotas guiding the management of sites, users are now working in a controlled, structured environment that caps the natural tendency for site sprawl and information chaos. Supported by the other requisite policies for content and terms of use, and a proper governance model defining the roles and responsibilities for all, the intranet has a very sound governance foundation.

Finally, it is possible to put in place workflow approvals so that if the client organization chooses, all new sites have to be approved by a business owner prior to going live. This is the gatekeeper model which may be necessary if the information demands and site growth is not overwhelming for the available staff to manage.

### **Meta data (keywords) for content**

All news, and any content page for that matter, must have meta data or keywords applied at the time of publishing by each and every content contributor (author). This is done via the taxonomy or *Term Store* in SharePoint, before the content is published live.

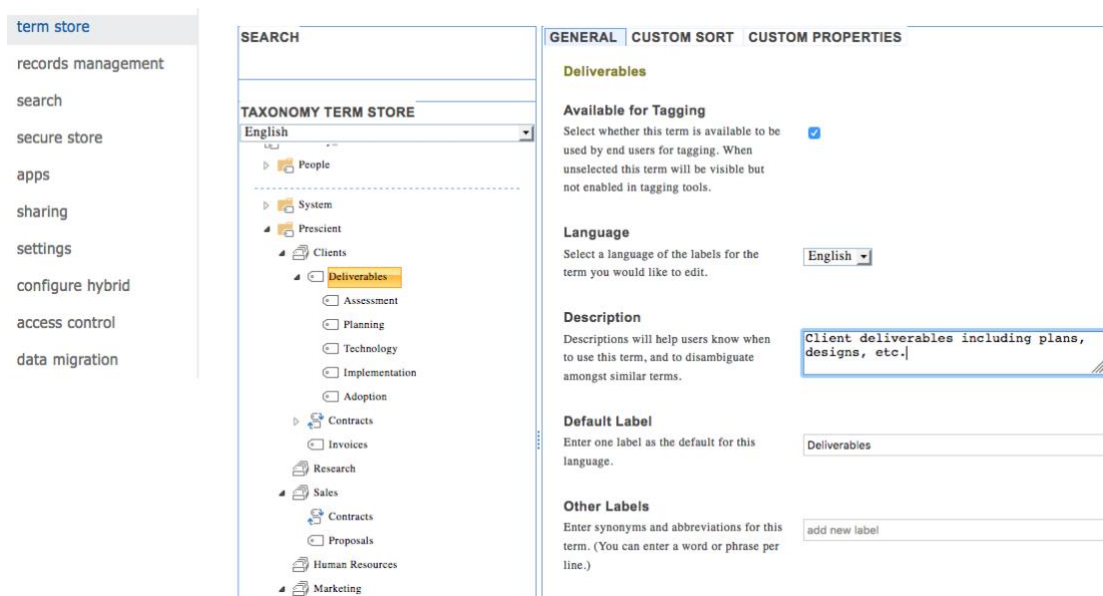
Working with taxonomies is like using tags. If you tag content items with taxonomy terms, you can filter them accordingly in the content section. Taxonomy terms are organized in taxonomy groups.

Before a term store is created and applied to a site, a taxonomy should be created offline. A taxonomy is of course a classification set (term set) that is built into a *Term Store* prior to enabling publishing. Intranet owners should ensure that the *Term Store* is completed prior to any publishing and that terms or meta tags are applied to every page whenever content is published (regardless of the publisher).

Taxonomy parent categories, those umbrella categories under which all taxonomy terms will fall under, should reflect the types of content found in the intranet information architecture. Parent categories might include:

- Finance
- Research
- Diversity
- Program

- News
- Event
- Office
- Application
- Policy
- Community
- Customer.



*The Managed or Taxonomy Term Store in SharePoint*

The development team, when creating the publishing templates (e.g., news page, *Team Site*, etc.), should ensure that each publishing template forces the mandatory inclusion of “closed terms” (terms or keywords chosen directly from the taxonomy tree) and “open terms” that are freely put into a content page that would not be found in a taxonomy tree (i.e., specific subject matter, expert’s name, form number, etc. For example, Robert Green, customer service rep, application form CM76892A).

A final note on the taxonomy categories or buckets (site collections): there is a tendency in most intranets to create dozens of these buckets and put them all on the home page. This is a common mistake that a professional information architect would not make but is a common practice by communicators.

“I believe in limiting the number of top-level site collections to seven (and strongly recommend that they not grow above 10),” says Schneider. “The Dewey Decimal system (the global knowledge taxonomy used in libraries and information sciences) is applicable to all the information in the entire world and only has 10 buckets (parent categories). We can run an intranet with only seven buckets.”

## **FIGHTING SPRAWL**

Some intranet managers would love to be blessed with the problem of the intranet being used too much, or having to host a plethora of content and pages. “If you've got users over-running your SharePoint environment then that's the right problem to have,” says Robert Bogue, Microsoft MVP consultant, [President of Thor Projects](#).

*Use = value. Value = funding and recognition.*

However, information sprawl isn't the ideal scenario. Should it occur at your organization, Bogue recommends running audit reports to determine which sites are not being used. For example, there are reports for when a site collection is created, how often it has been accessed, and how often it's been modified.

“If you end up with 20,000 sites, one of the things you can do is look at all the sites that haven't been modified. You can then turn-on “auditing” (including “read” auditing) and let it run for a week or a month,” recommends Bogue. “Then examine the auditing after a month and if no one has modified or read the site, you can archive the site (and eventually delete it).”

Bogue says that a typical audit will weed-out 30-60% of all sites.

While some organizations, like Transfield Services (profiled earlier in this paper), have decided to limit the features and functionality of sites and site collections, this approach doesn't directly solve the problem of intranet sprawl.

“I encourage people not to turn features off,” says Bogue. “If you give people an appropriate amount of constraint, they will behave accordingly. There are of course a few people that may try to abuse the system, but the number of them are relatively small. As long as they're working under a site collection (and the inherited parameters) and the given quota, then I really don't care what they do.”

There are some features like site design themes that corporate communications can lock down for branding purposes. Other organizations might choose to turn off blogs for cultural or security reasons. However, most organizations enable most of the feature set that comes with SharePoint.

“When you start focusing on turning features off, you start limiting the amount of value you get from the platform,” adds Bogue.

## FINAL ANALYSIS

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SharePoint may be the world's most popular intranet platform, loaded with bells and whistles, but without the proper planning and governance, a SharePoint deployment could become your organization's most expensive failure. To avoid the information chaos that can occur, a successful SharePoint implementation requires a proper, detailed plan and governance model that explicitly details the ownership model, roles and responsibilities for all, supported by clear policies.

Implementing proper governance for SharePoint (or any intranet technology) does require some experience and an outside third-party expert or intranet consultant is strongly recommended if there is any hint of obstacles to succeeds like internal politics or competing priorities amongst intranet stakeholders. An outside intranet consultant is considered mandatory if HR, Communications, IT and other key departments and business units are not in explicit agreement about who should own the intranet and what the model should look like.

*It's the perfect solution, if you have an abundance of time, patience... and money.*

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### Planning and Governance checklist:

- Current site evaluation
- User research
- Stakeholder input
- Benchmarking (best practices)
- Strategic planning (including goals and objectives)
- Critical success indicators (KPIs)
- Governance model
- Content & design policies
- Business case (ROI)
- Functional plan
- Information architecture



- Page wireframes
- Design concepts
- Technology selection & implementation.

Specific SharePoint recommendations:

- **Champions** – find and secure one or two c-level executives that are internal champions, sponsors and sources of funding (often the CIO, or chief of marketing or communications or HR).
- **Content migration** – don't move over all your old content. Undertake an audit of what is needed and what is not. Migrate only the necessary information.
- **Taxonomy** – create a global information taxonomy of up to seven categories that becomes your global information categories of your information architecture. These six to eight categories (no more than 10) become the site collections for your intranet portal.
- **Business owners** – ensure that each major category and site collection has a business owner that is responsible for the properties of all sites under the site collection.
- **Governance team** – build a governance team of key IT, communications and HR people, and include the business owners of the major site collections.
- **Site policy** – create an overarching policy (or a series of specific policies) that govern the creation and use of sites, pages and content.
- **Workflow** – consider baking approvals into the provision (creation) of new sites and site collections. Once a site is created, it must be approved before going live (though not always recommended in very large organizations of more than 10,000 employees).
- **Auditing** - turn-on auditing (including “read” auditing) for those sites that have become stale. After a month, if no one has modified or read the site (or only minimally), you can archive the site or eventually delete it.

## MANDATORY

A strategic plan determines the long-term mission, vision, and medium to short-term goals of a new social intranet. Like the strategic planning pyramid, the planning process starts at the top with the high-level strategic directives such as vision and mission, before defining specific goals, KPIs and governance structure. Effective governance is a mission-critical necessity: it defines how the ownership structure, including the executive sponsor, committee structures, staffing model, roles and responsibilities of publishers, site owners, etc., fits into the overall reporting and approval structure.

## ABOUT PRESCIENT DIGITAL MEDIA

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**LISTEN. UNDERSTAND. DELIVER.**

We are the original intranet consultants; The Intranet Experts.

Prescient Digital assesses, plans, designs and builds world-class intranets and enterprise solutions for Fortune 500 and big brand leaders. We are recognized experts in this space for more than 18 years working with over 300 organizations. We are technology agnostic, working with many technology platform, but most of our clients run SharePoint and Office 365, for which we have particular expertise.

Headquartered in Toronto, Prescient works for global corporations in various industries and sectors worldwide. Our core strength lies in understanding and balancing the digital needs of our clients' business models, with the goals and intents of the people who will ultimately use these digital solutions. We see the digital workplace as the primary means to manage your most important relationships with your employees, beginning with the hub or gateway, the intranet.

We treat each client as unique; we listen to their needs, goals and challenges; understand a client's requirements and potential; and deliver highly effective and innovative website and intranet plans, designs and solutions.

**Some of our clients:**



Having worked on more intranets than any firm of our size, we are simply one of the best at planning, designing and delivering highly effective intranets and digital workplaces. We are the:

- First to develop an intranet specific methodology and service approach
- First to study and define a social intranet
- First to study and define intranet governance
- 15+ awards including a Webby Award.

### **Why Prescient**

- Prescient boasts a full roster of world class, Fortune 500 clients.
- We build success measures (key performance indicators) into every project.
- Prescient has an extensive list of global, expert speaking engagements with dozens of conference, seminar and webinar events every year.
- Our work has won more than 15 awards including a prestigious Webby Award.
- Prescient has the most published team of experts of any firm in its class with hundreds of published articles to date.

### **Expertise**

Our leaders have rich, hands-on expertise and 25 years of experience. We know the industry inside out because we've been inside it as it evolved. We have worked alongside hundreds of customers, from Fortune 500 companies to small and medium sized businesses alike. Our leaders have held senior management positions at reputable companies and brought all their expertise and knowledge together in Prescient. We use proven methodologies, to deliver measurable results that are superior relative to other companies.

### **Focused on Each Client**

No two clients are the same. All organizations have different cultures, structures, workflows, communication channels, resources, directions, objectives, and so on. Therefore, your intranet must be customized to your business, to meet all your unique needs. This is the reason why our in-depth consulting methodology (Listen. Understand. Deliver.) is so central to our work and focus on our clients.

We are the original intranet consultants; The Intranet Experts.

**For more information, call us at 416.926.8800 or visit [www.PrescientDigital.com](http://www.PrescientDigital.com)**