

Get Your SharePoint Project Started Right

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Who am I?

- Publishing History
 - Book Author: Contributing to 16 books
 - Writer: Approximately 50 articles per year on IT Management, Software Development, SharePoint, and other topics
- Microsoft MVP: 4 years for SharePoint Portal Server, Commerce Server and Windows Server Networking
- Certifiable: MCSE (NT4 & W2K), MCSA:Security, Server+, Network+, I-Net+, IT Project+, e-Biz+, CDIA+
- Blogger: <http://www.thorprojects.com/blog>

Agenda

- Terminology
- Prototyping
- Risks
- Requirements
- Myths
- Keys to Success



The Game

- Try to guess whether I took the picture on the slide
 - Some pictures I took and some were bought as stock photography
 - One photo was specifically shot for this presentation
 - Hint: I didn't shoot the background



Terminology (1 of 2)

- Alert
- Collaboration
- Ghosting vs. Unghosting
- Portal
- Single Sign On



Terminology (2 of 2)

- Site Definition vs. Site Template
- Site vs. Web
- Web Part
- Web Part Pages
- Web Part Zone



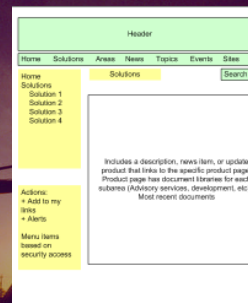
Terminology Techniques

- “What do you mean by?”
- “What would be an example of ...?”
- “When you think of ..., what do you think of?”



Prototyping

- Wire Frames
 - Prevents detailed image and color discussion
- SharePoint Sites
 - More flexible but often distracting



Types of SharePoint Projects

- Internet
- Extranet
- Intranet
- Document Management
- Project Management
- Collaboration
- Mini-Application
- Application



Types of Risks

- Bad Expectations
- Poor Terms Definition
- Poor Understanding
- No Compelling Reason
- No Value Proposition
- Tools Syndrome
- No Launch
- Poor Adoption
- Politics
- Culture



Bad Expectations

- It is a silver bullet
- You think it does more than it does
- It scales to larger volumes than it actually does.



Poor Terms Definition

- Not everyone means the same thing when they say a word.
- Consider the word “Collaboration”



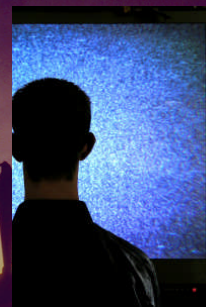
Poor Understanding

- Not realizing how things are connected
- Consider timer and workflow
- Consider search and alerts



No Compelling Reason

- What one thing is going to make them come?
- Hundreds or thousands of small things isn't enough to change behavior



No Value Proposition

- The return must outweigh the effort
- The compelling reason gets them there, the value proposition keeps them there.



"Tools Syndrome"

- Tools without the carpenter do not build houses
- Don't hand over a set of tools, hand over a solution



No Launch

- "If you build it, they will come" doesn't work.
- Evangelize the benefits



Poor Adoption

- Critical mass of participation is needed to create newness
- Without enough adoption the solution will eventually fail



Politics

- Bickering about who should own and who should participate can grind things to a halt



Culture

- We are sometimes prisoners of our environments
- Find ways to unlock the shackles that prevent change



Installations-Risks Grid

Type of Risk	Type of Installation							
	Internet	Extranet	Intranet	Doc Management	Project Management	Collaboration	Mini-App	App
Bad Expectations	●	●	●	●	●	●	●	○
Poor Terms Definition	○	●	●	●	○	●	○	○
Poor Understanding	●	●	●	●	○	●	○	○
No Compelling Reason	○	○	●	○	○	○	○	○
No Value Proposition	○	○	●	○	○	○	○	○
Tools Syndrome	○	●	●	●	○	●	○	○
No Launch	●	○	○	○	○	○	○	○
Poor Adoption	○	○	○	○	○	○	○	○
Politics	●	○	○	○	○	○	○	○
Culture	○	○	○	○	○	○	○	○

Characteristics of a Good Requirement

- Objective – “Based on observable phenomena; presented factually.”
(American Heritage Dictionary, Medical Dictionary)
- Precise - Clearly expressed or delineated; definite
(American Heritage Dictionary of the English Language, Fourth Edition)
- Measurable – Possible to be quantified
- Criteria – Identification of the value necessary to meet the standard
- Clear and Understandable – without ambiguity



Requirements Goal

- Requirements can never be perfect.
- Requirements should be “minimally sufficient”
- Use Change Management to manage the gap



Functional Analyst Skills

- Elicitation
- Facilitation
- Evangelism
- Engagement
- People Integration



Recovering from Bad Requirements - 1

- Evaluate how bad the requirements really are
 - If really bad, start over or cancel
 - If kind of bad, fix them



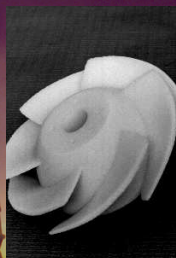
Recovering from Bad Requirements - 2

- Plan to fix issues, resolve ambiguous sections, and enhance weak areas
 - Approach it as a revision to incorporate changes not a fix.
 - Bring in a mentor or facilitator to improve the chances of success



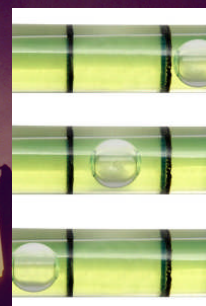
Recovering from Bad Requirements - 3

- Use a prototype to elaborate requirements
 - Wireframes keep people from picking the details while getting the basic flow
 - SharePoint's built in tools can be used to create semi-working prototypes.



Recovering from Bad Requirements - 4

- Find the true customer
 - Eliminate the people between you and your customer – by force if necessary
 - Beware of would be proxies



Recovering from Bad Requirements - 5

- Mentor and Train the analyst
 - Bad Requirements are not an accident. They are the result of a lack of training.
 - No amount of training can equate to mentoring.



Recovering from Bad Requirements - 6

- Get everyone to share the same vision
 - It is the hardest part of the process
 - If you don't know where you're going you'll never get there



Recovering from Bad Requirements - 7

- Encourage the team to work like a team
 - Don't throw requirements over the wall
 - Make it a team effort to get better requirements



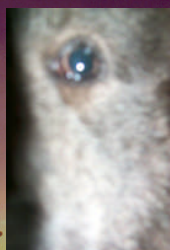
Recovering from Bad Requirements - 8

- Train the team on the users challenges
 - User challenges aren't always what they seem



Recovering from Bad Requirements - 9

- Review requirements priorities
 - Sometimes the things that are staring you in the face aren't that important
 - Create a traceability matrix to show the source of requirements



Top 10 SharePoint Myths - 1

- Myth
 - It Does Everything (It's a silver bullet.)
- Reality
 - It's a good tool – but only a tool. It has strengths, weaknesses, and limitations that must be considered



Top 10 SharePoint Myths - 2

- Myth
 - It eliminates the need to organize.
- Reality
 - It requires more thought around how things are organized – but offers better results.



Top 10 SharePoint Myths - 3

- Myth
 - It will reduce storage space
- Reality
 - It will increase storage space due to indexing and multiple versions



Top 10 SharePoint Myths – 4

- Myth
 - Everyone will embrace SharePoint
- Reality
 - People don't like change. SharePoint must be user-friendly and offer value



Top 10 SharePoint Myths - 5

- Myth
 - SharePoint is so easy we don't need training
- Reality
 - SharePoint is user-friendly but still has areas which are not obvious to every potential user. Maximum effectiveness requires training for the administrator, developer, and end users.



Top 10 SharePoint Myths - 6

- Myth
 - SharePoint is a "just add water" ... (Insert: Executive Information System or Portal)
- Reality
 - Executive Information Systems and Portals require thought. The tool is easy to use but the fundamental thinking, the difficult part, is still required.



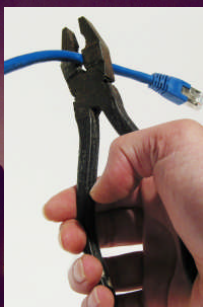
Top 10 SharePoint Myths - 7

- Myth
 - Built in SharePoint Discussions will handle my forum needs
- Reality
 - Discussion forums are useful for the most basic scenarios only. Most serious discussion needs will need to integrate a forum system.



Top 10 SharePoint Myths - 8

- Myth
 - SharePoint has a good off-line story
- Reality
 - SharePoint has a lousy off-line story. Lists are available off-line via Excel. Documents are available if downloaded before hand. Third Party products make it better but not transparent.



Top 10 SharePoint Myths - 9

- Myth
 - SharePoint has "Roll Up" Support
- Reality
 - "Roll Up" support is present but it's not user friendly



Top 10 SharePoint Myths - 10

- Myth
 - Fully Flexible and Extensible Out of the Box Workflow
- Reality
 - OOB workflows are a good start
 - Development is needed for complex Workflows



Warning Signs - 1

- Sign
 - You require a large amount of process change for SharePoint to work
- Effects
 - Poor Adoption
 - Long Implementation times
- Suggestions
 - Minimize change as much as possible
 - Bring in specialists to help



Warning Signs - 2

- Sign
 - Your defaults encourage bad behavior (i.e. Office default directories)
- Effects
 - Longer Adoption Cycles
 - User confusion about what to do
- Suggestions
 - Change default directories to appropriate locations
 - Provide Tip sheets which explain what to do



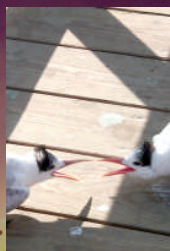
Warning Signs - 3

- Sign
 - It doesn't work well for ... but you're going to use it for that anyway
- Effects
 - Poor Success Rate
 - Frustrated Users
- Suggestions
 - Define an exit strategy and timeline
 - Communicate the exit strategy and timeline



Warning Signs - 4

- Sign
 - You have a hostile business to IT relationship.
- Effects
 - Poor Requirements
 - Insufficient tolerance for quirks causes friction
- Suggestions
 - Identify and resolve core issues around the relationship.
 - Create a fun, friendly, team environment



Warning Signs - 5

- Sign
 - You have a disconnected work force
- Effects
 - Users have difficulty getting the information they want
- Suggestion
 - Invest in Groove or a 3rd Party tool



Warning Signs - 6

- Sign
 - You're focused on turning off features
- Effects
 - You stop focusing on making things work
 - Users expect functionality that doesn't come
- Suggestions
 - Evaluate what has to be turned off and what can be discouraged



Warning Signs - 7

- Sign
 - Your organization has poor project management
- Effects
 - The project will be late and over budget
- Suggestions
 - Ensure that project management artifacts are created
 - Strengthen the project management in your organization



Keys to SharePoint Success - 1

- What
 - Honest evaluation of strengths and weaknesses
- How
 - Review past successes and failures
 - Rate yourself and your organization against checklists of requirements



Keys to SharePoint Success - 2

- What
 - Help users find the information they need
 - from every source
 - Other People
 - Other Providers
 - Applications
- How
 - Enable Search
 - Enable search across or create links to other content



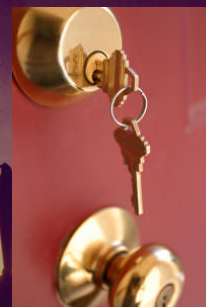
Keys to SharePoint Success - 3

- What
 - Shared Vision
- How
 - Joint Application Design (JAD) sessions
 - Prototypes
 - Agree to the Problems before the Solution
 - Create a Project Charter



Keys to SharePoint Success - 4

- What
 - Ownership
 - Accountability of Content
 - Commitment to Success
- How
 - People Integration



Keys to SharePoint Success - 5

- What
 - Evangelism
- How
 - Identify and communicate the match of product strengths and organizational needs



Keys to SharePoint Success - 6

- What
 - Right Sizing the Solution
- How
 - Identify the cost of the problem and create the solution based on that cost
 - Identify the least costly approach and it's limitations – upsize from there.



Keys to SharePoint Success - 7

- What
 - Component-based Construction
- How
 - Create Web Parts and User Controls – not solutions
 - During design ask how could this be used again



Keys to SharePoint Success - 8

- What
 - Imperfect Solutions
- How
 - Focus on "Good Enough" not elegance



Questions?

Thank You!

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