

SharePoint Governance: “How to Keep Your Sanity and Avoid Redeploying Next Year”

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contributions from Scott Davis, Scott Jamison

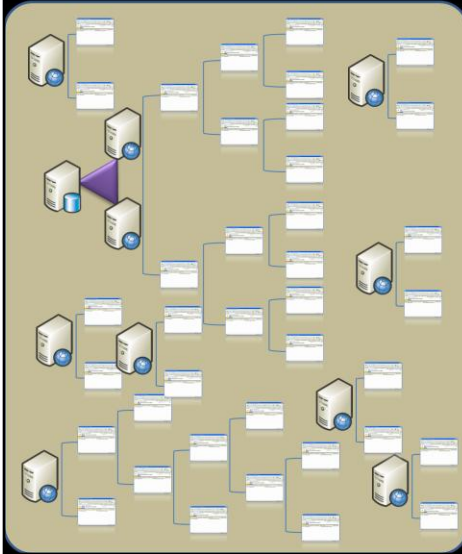


Photo: Natalie Lucier

interactive session

SharePoint Management

The Challenge: Fast Adoption



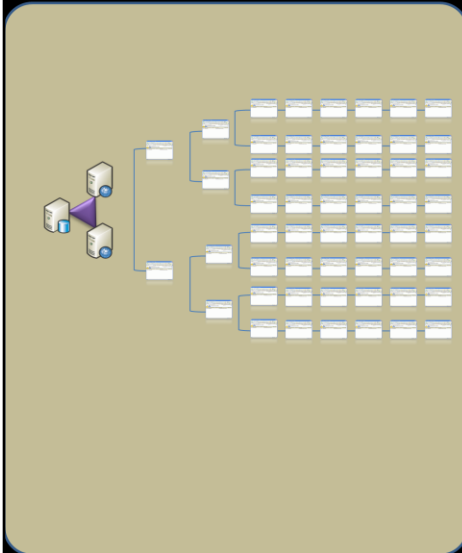
- Unmanaged growth and capacity
- Enables centrally managed environment
 - No remote administration
 - No service monitoring
 - No SLA Enforcement
 - Governance and Compliance
 - No standardization
- Unpredictable

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SharePoint Management

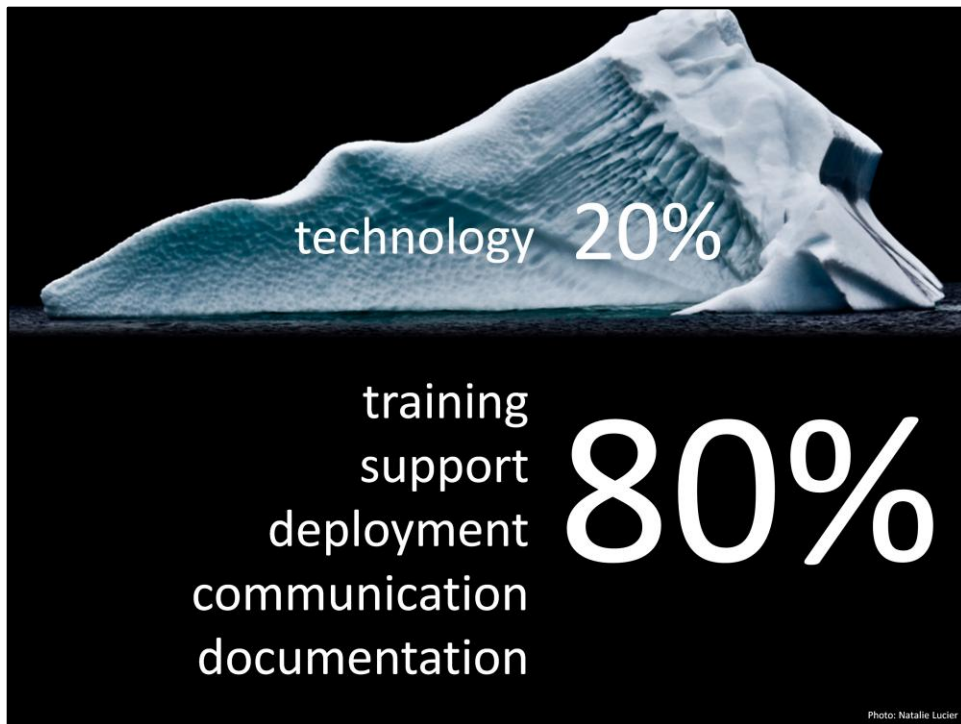
Managed Growth – The Objective



- Pre-cursor to planned capacity and managed growth
- Enables centrally managed environment
 - SLA enabled
 - Service monitoring and continuity
 - Remote administration
 - Standardization
 - Compliance
- Visible and predictable!!!

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of a typical SharePoint deployment project

need to know to ask these questions, not to know the end-to-end

the best technology will not prevent failure

**common
mistake**



not defining policies for
SharePoint is and **is not**
used for

**common
mistake**



letting end-users
manage security when
they have no clue what
they're doing

most users

remove all users from site or add all authenticated users

train site administrators (more culture than technology)

**common
mistake**



not treating SharePoint
line an enterprise
application

**common
mistake**



poorly designed lists
cause performance
problems (training issue
for end users)

users translate things that worked in Access or Excel into SharePoint...

end users can take down the server

you can throw hardware at it, but this has limits

**common
mistake**



not planning for scale
or growth

**common
mistake**



not deploying
SharePoint as a
centralized service for
the organization

departmental farms almost always lead to problems

**common
mistake**



**not testing backup and
recovery**

“sure, we do backups!” test them? nope.

you wouldn't make this mistake with a LOB application - - SHarePoint is no different

**common
mistake**



**not testing backup and
recovery**

“sure, we do backups!” test them?

you wouldn't make this mistake with a LOB application - - SHarePoint is no different

SharePoint Deployments

Characteristics of organizations that have...

- Successful SharePoint implementations
 - **Have specific business goals they are trying to solve**
 - **Pre-define governance policies**
 - Commitment to other Microsoft technologies
 - .NET development skills
 - Primary needs around collaboration
 - End-user empowerment desirable
 - **Train and communicate policies to end-users**
 - **Understand when SharePoint is not the right solution**
- Unsuccessful SharePoint implementations
 - Have no clear business driver
 - Inadequate governance
 - Historically slow company-wide adoption of new Microsoft technologies
 - Mostly Java development skills
 - Primary use case of application integration
 - Deployed established and overlapping technologies
 - Strong desire for top-down deployment over bottom-up

signs of trouble:

site proliferation with random placement

database storage overrun, grows unexpectedly

unpredictable performance

no feedback loop to adapt to understand user requirements and adapt the solution

security breaches

sites added everywhere, by everyone, with no pattern, regard for placement and intent

no policies on site size, growth – databases can balloon over a weekend and take the site down

performance issues and memory leaks associated with rouge development processes, lack of testing

some SharePoint features (like search) work best with a feedback loop

old patterns mapped into SharePoint can expose security lapses (confidential file tucked away is now exposed through search)

signs of success:

sites are logically organized,
use site templates, created by
the appropriate people

predictable growth of server
farm and storage

SLAs in place, platform is
reliable

committee to analyzing usage
data, incorporate feedback

security model is implemented
and consistent

security model: eg. site collection admins are 'certified'



**two key things: plan and control SharePoint usage
and measure success --
(satisfaction, hits, size, calls) – this is psychological – people need to see signs of progress**

SharePoint overlaps with other applications – so SharePoint is a platform, foundational (not just an app);



step 1: define your purpose

Why are we deploying SharePoint?

Intranet Portal?
Web 2.0? Social Computing?
Application Platform?
Search Platform?
Document Repository?
Workflow Engine?
Extranet? Internet?
Access Replacement?
Team Sites?
Everyone else is doing it.

what's **not** in scope?

existing solutions?



step 2: define your process

Photo: Bob MacInnes

governance document

defines management
procedures, change
management processes, roles
and responsibilities



not
implementation details

A governance doc should contain:

- Company Usage Policies
- Change Management Procedures
- Roles and Responsibilities

A governance doc should not contain:

- Implementation Details
- Network Requirements
- Feature Requirements

the process of creating the document is the most important part

Microsoft's guide for governance – template updated in March
But don't just use it as your model – adopt it

make it granular, use a wiki or SP list – avoid shelf-ware

appropriate size and detail

enough to give a framework;
not so much that it's unenforceable



TIP: Only document what you can and will enforce (1 page or 100 pages); find the right level of detail

step 3: identify sponsors and stakeholders

challenging to know who owns SharePoint -- who paid for it? who upgrades it?

**the right players— early
include business stakeholders, IT and PMO
use existing standards (six sigma, ITIL, ISO)**

Put the right team together...early

List key stakeholders in the governance specification. Be sure to do the following in your planning process:

**Include both business process and IT process
contacts on the governance team**

**Work with the PMO and standards teams within
the organization to leverage ITIL, ISO, Six Sigma,
and other standards that may be in place**

To determine the key sponsor,

**Ensure the individual has budget and decision-
making authority**

In other words...

don't just look at the org chart – find mid-level people that are smart and a track record of getting things done

reach into the business – connection back to revenue or cost reduction



power sponsor = **budget** + **authority**

step 4: define the governance board

- an extension of the key sponsors
- liaison to related teams
- this is a working group
- defines policies
- ongoing
- address trends, challenges, 'circuit breakers'
- audience: who's doing this?
- examine adoption blockersfinding scenarios to engage with other teams (networking, security)



A governance board should consist of:

- Leaders from the relevant business units

- The central PMO (Project Management Office)

- Technology leadership

- If the portal is being used for employee communication, then a top person or delegate from corporate communications

- The company CEO (for small to medium companies)

Culture can make a difference

- For example, in Japan the CEO will not participate



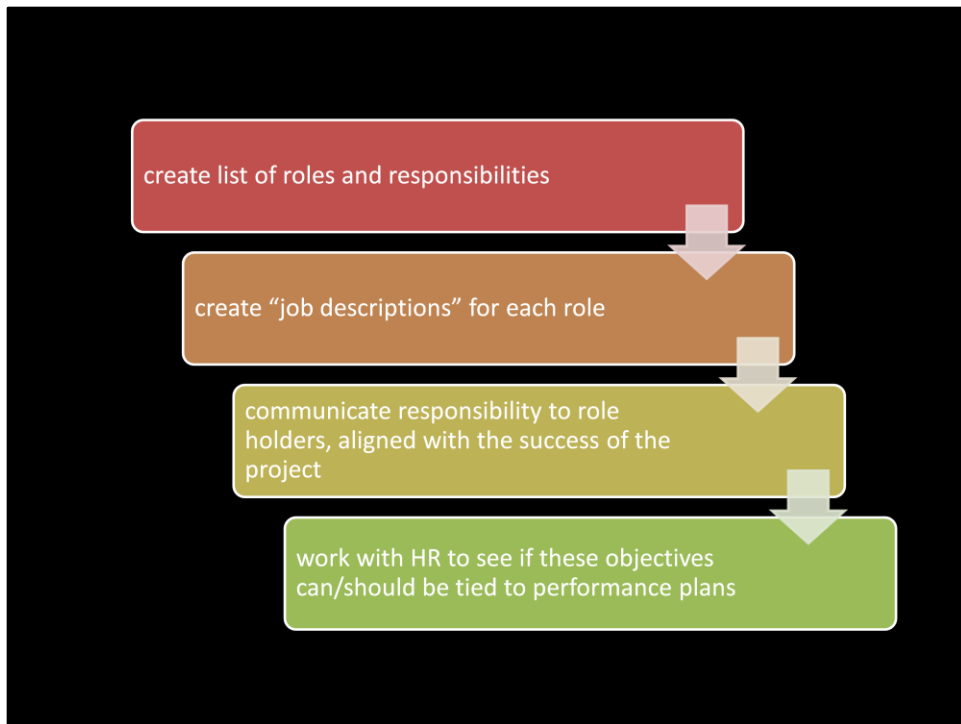
step 5: define roles and
responsibilities

getting the **right** people in place is
an important step in the process

identify your gaps

Don't assume SharePoint can be managed with existing resources.

Getting the right people in place is an important step in the process;



be sure to consider the following:

Use the list of SharePoint Solution Roles and Responsibilities to create “job descriptions” for each role.

Make sure that users in each role understand their responsibilities to ensure the success of the solution.

Engage your Human Resources department to help craft meaningful objectives for your SharePoint solution that might potentially be added to individual performance plans.

not an ‘extra-curricular’



SharePoint user handbook

online resource

links to support and training

outline process for change requests

consider publishing in a wiki

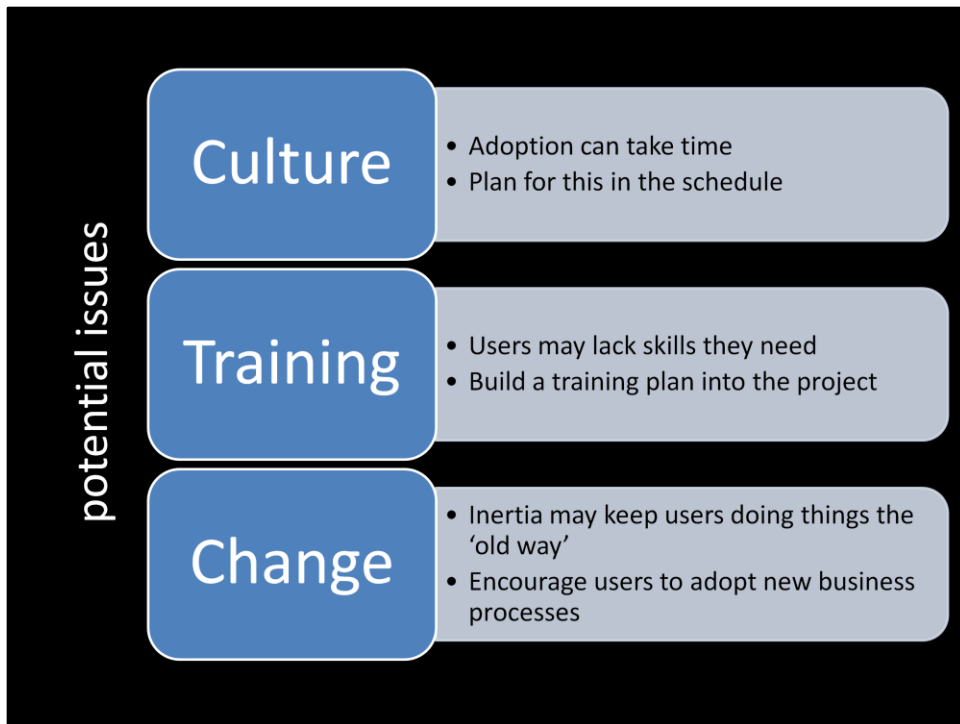
**clear instruction on how
and when users should
work with SharePoint**

what constitutes abuse or misuse of system

how to keep information secure
information

when to use SharePoint versus other
alternatives

step 7: adoption



Potential Issues:

The new system will require time for the company culture to adapt to it – build that time into the schedule

Users may lack sufficient training – ensure they get the training they need

Users may continue to do things the way they are used to – encourage users to adopt new business practices

Create a communications plan

Create a governance plan

Create a training plan

what are the deployment blockers?

step 8: change management
policies

Establish who can change and approve content

Establish policies regarding who will manage security on content

Establish policies on what customizations are allowed on a site (web parts, features, SPD customizations)

Establish policies for code deployment

Set finite periods for policy review/renewal

Establish who can change and approve content

Establish policies regarding who will manage security on content

very easy to mess up

determine the right level of granularity

Establish policies on what customizations are allowed on a site (web parts, features, SPD customizations)

package in features if possible for easy migration and upgrade

Establish policies for code deployment

including security review

is it code or content?

Set finite periods for policy review/renewal



step 9: training

- Site Collection Administrator Training
 - Most Important!
- Train engineers, ops, developers, designers and support personnel
 - Skills to design, manage and support
- Internal end-user training
 - Don't forget business process applications
- Service Portal or Site
 - Announcements
 - Videos, FAQs
 - Education site with tutorials and manuals

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step 10: define success metrics

- Define success metrics for your governance plan
- Measure!
- Revisit governance regularly; it's OK to revise it as business usage or needs change

- Define success metrics for your governance plan
- baseline, Measure!
- Revisit governance regularly; it's OK to revise it as business usage or needs change

information architecture
and deployment models

Supportability Models

Your IT Hosting

Basic Site Collection Hosting

- Low cost to Free (low barrier)
- Self Service (w/ meta data capture or workflow)
- Fixed Quotas
- SharePoint Designer (optional)
- Out of box templates + Application Templates

Multi Tenant

Web App Hosting

- \$ Charge Back
- Multi Tenant
- Web App/App Pool
- No GAC access
- Custom Site Templates
- Limited LOB Integration

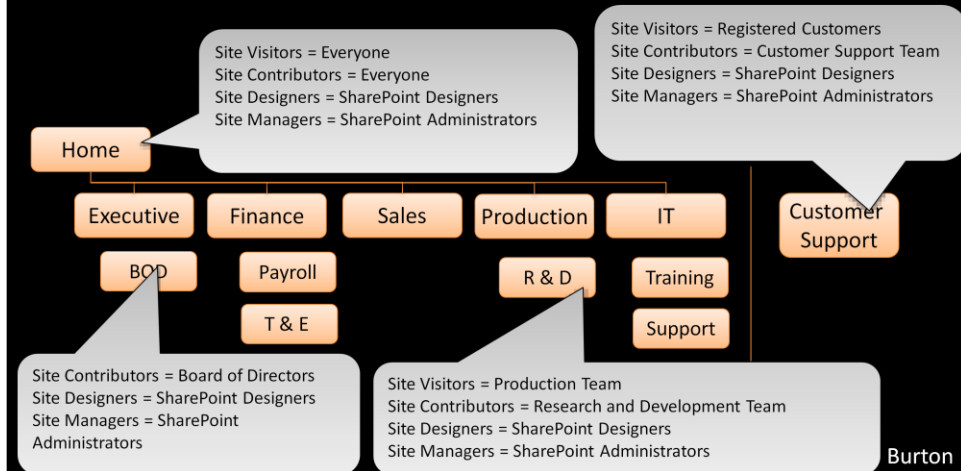
Premium

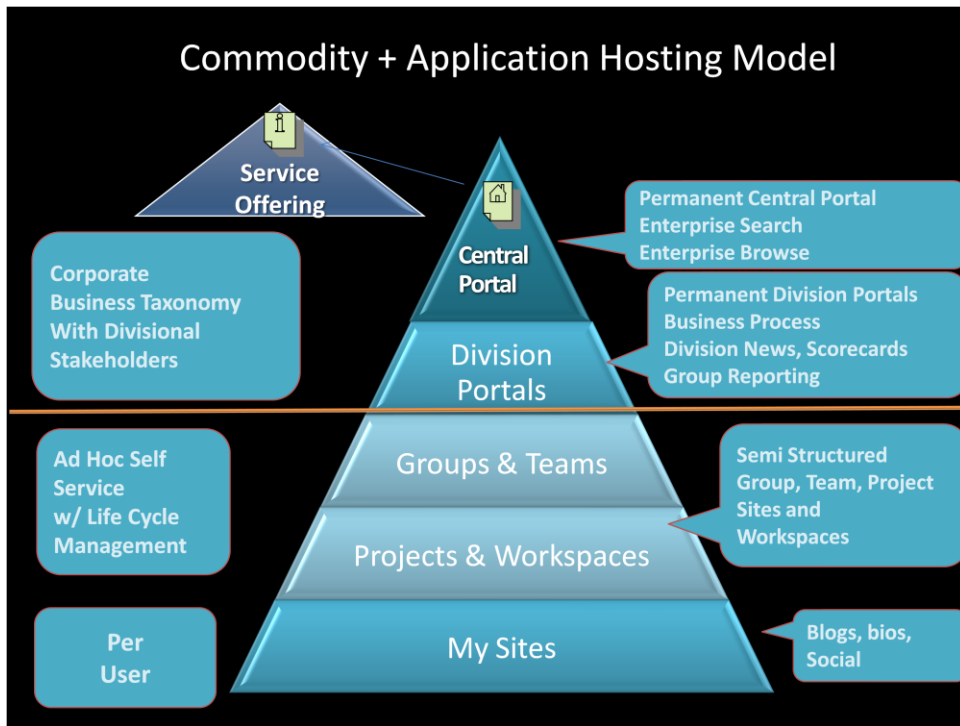
- \$\$\$ Charge back
- Dedicated
- Virtual or Physical Separation
- Custom LOB Integration
- Business Focused Dev
- Dev/Test environments

Portal Information Arch example

Build initial site architecture and set up site security

- Delegate site and list administration to trained site admins where appropriate



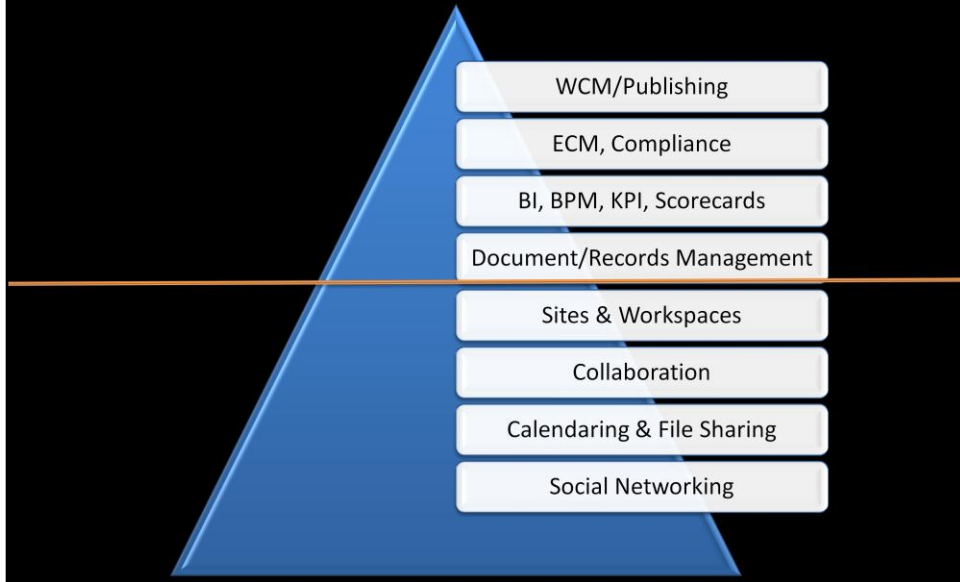


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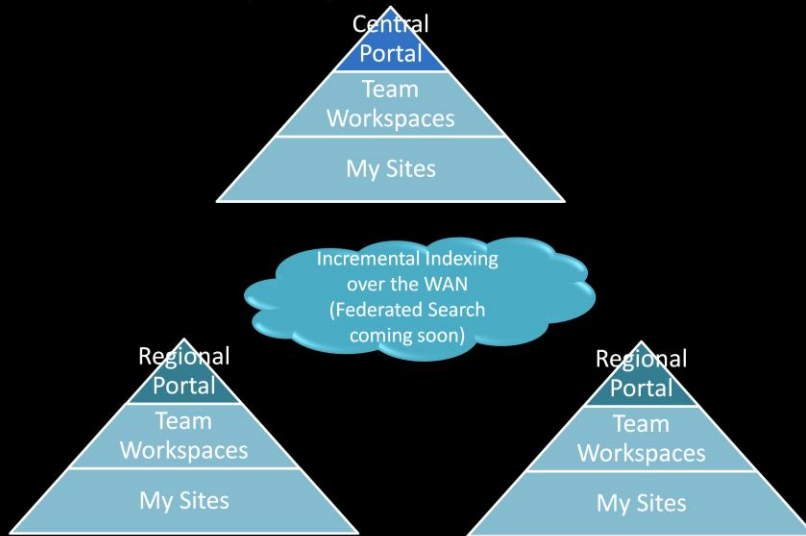
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Structured vs. Unstructured Data

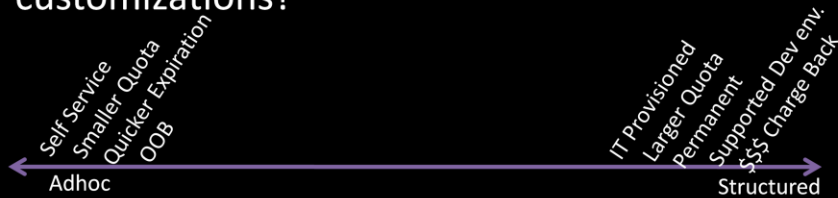


Multi Deployment/Global Model



Building a Service Offering

- At what level do I enable **self service**?
 - Where do I want IT to Step In.
- What **quota** should I allow?
- How will data or sites be **expired**?
- How will I provide **search** or **browse**?
- How does my support scale and support customizations?



Solution Accelerators

- Guidance and Automation(tools) that help integrate people, process and technology focused on cross product IT Pro service scenarios
- Drive the value of Microsoft Technology (cross product integration)
- Focus on real customer problems
- Rich Portfolio of guidance and tools (End-to-End Lifecycle View)

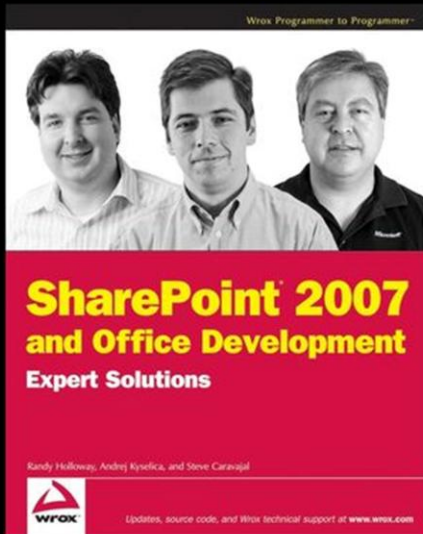


Available for Free

www.microsoft.com/SolutionAccelerators

SharePoint Management Opportunities

- Extremely fast adoption (Spreads across the Enterprise)
- Managing SharePoint across the Enterprise is difficult
- Do I have the correct SharePoint Infrastructure to support customer demands
- How do I determine my SharePoint sites are down?
- SLA for SharePoint Applications
- Virtualization



Shameless Plug

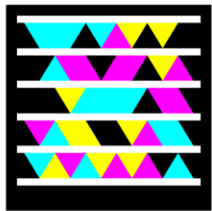
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