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# 7 Keys to SharePoint Success

*Ensure that your SharePoint project has all the  
right elements in place.*

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Have you wondered what makes some SharePoint projects succeed where other SharePoint projects fail? Have you wondered why your SharePoint project struggles from time to time? Have you ever wanted a roadmap to help you avoid all of the swamps and rocky terrain that seem to make SharePoint harder than it should be?

SharePoint projects can be easy or difficult depending upon what you're trying to do, the organization's make up, and the way you manage the project. The seven keys below are designed to help you increase your chances of success as much as possible.

## **Key #1: Honestly evaluate**

Before you start your SharePoint project -- or when you have to review the performance of a roll-out that is in progress -- it's important to honestly evaluate its strengths and weaknesses. An honest assessment of what you're good at is very difficult. In twelve-step programs that have a self-assessment step it's typically the step that most people get stuck on. It's hard to accept what you don't do well.

However, SharePoint projects can be unforgiving in areas of configuration management, project management, understanding of server infrastructure, network fundamentals, etc. Any one of these areas can quickly become a major problem in a SharePoint implementation, so knowing what you're not good at and may need to seek help for is essential to ensuring that your project is successful.

Most people approach SharePoint from the perspective that it's an easy product ... and it can be. However, SharePoint projects can be similar to large-scale ERP implementations. These types of installations require excellent project management skills to pull off. If you know that you're struggling with any particular issues, consider what impact this might have on your project and develop strategies for mitigating those risks.

## **Key #2: Help users find information**

One of the real strengths of SharePoint is its ability to connect users with the information they need. Whether it's the ability to dynamically add links to the site, search content, or even connect with a person they know has the answer, SharePoint offers a great platform for helping users find their information.

There are certainly techniques in SharePoint that can focus or control users' access to information. For example, you can prevent users from entering their own links. You can disable Search or render it ineffective. And, you can suppress the hyperlinks for instant messaging communications.

However, the question that should be in your mind is "What is the ultimate goal?" If your goal is to improve productivity, then you should look for every opportunity to enable people to get the information they want -- even if the way they want to get the information isn't what you would consider to be the right way of getting it.

Focus on enabling users to get the information they need no matter what the source is. This perspective will allow you to help them get information from other Web sites, documents, packaged applications, and even people if that is what they think is best. Encourage ideal behaviors, but allow less ideal behaviors when it is in their overall best interests.

### **Key #3: Encourage shared vision**

SharePoint projects, particularly those that are intranet replacement projects, often struggle from a lack of unified vision. This is partially because SharePoint is so flexible that it can often be used to solve an organization's problem in multiple ways. Each member of the team might have a slightly different solution in their minds -- one that solves their focal point of the problem the best.

In the enthusiasm of being able to solve several or even dozens of problems, the effort to clarify understanding of what the problems are and what solutions are being proposed is all too often lost.

Take the time to clearly understand what SharePoint can do, what you want SharePoint to do, and which solutions you're prioritizing over others. By bringing together this vision up front, you minimize the danger of having too many expectations of the project.

### **Key #4: Create a culture of ownership**

If you were to be able to do a postmortem on most IT projects, you'd be likely to find a high incidence rate of a "lack of ownership." It is characterized by poor customer involvement, poor communication, and lack of support once the project is launched, if it even makes it to that point.

With SharePoint there is no reason why this has to be the case. SharePoint offers rapid prototyping capabilities, a collaborative platform for the team, and facilitated connectivity with all of the team members. Further, SharePoint empowers users to change content, change layout, and work with the fundamentals of what is presented without IT's involvement. This creates an opportunity for users to take direct control of their solution and therefore feel a sense of ownership in it.

Offer to involve customers in learning more about SharePoint. Get them the training and resources they need to feel comfortable that they understand SharePoint's strengths and weaknesses. Encourage the customers to come interact with the development team and even just wander around to see the progress that is being made.

### **Key #5: Energize with evangelism**

Despite the potential for irrational exuberance around SharePoint, it is sometimes necessary to evangelize SharePoint to the users within your organization. Not every person immediately

understands the value that SharePoint can bring to an organization. Not all of the problems and solutions seem to immediately match up. It isn't often clear how SharePoint can be used to solve the problems the organization has.

For those who are unable to connect the dots between SharePoint features and the problems they face, provide an evangelist who can help connect the dots or evoke the kind of palpable response that will have the person seek out more information.

Evangelism has historically been associated with zealots, the kind of folks who would stand on the top of the mountain and shout at the rain. Evangelists do not however have to be as extreme as the preceding would imply. They do, however, need a drive to envelop others with their passion for SharePoint.

Finding evangelists is difficult -- particularly since the best evangelists are not technical folks but are, instead, members of the business who have seen the value in what can be done. Evangelists are champions with an extra sense of exuberance.

### **Key #6: Right-size the solution**

Adam Macaulay of CorasWorks and I have many passionate discussions about the use of site templates vs. site definitions. The short of which is that site templates are easy, fast to develop, and have some longer-term challenges. Site definitions are the right way to go for extremely high-performance and enterprise deployments.

One point on which both Adam and I firmly agree is that whether you prefer site templates or site definitions, you must use the right one for the right situation. Site definitions are not right for smaller shops. Site templates and enterprises are a challenge.

Deciding what level of "roughness" a solution should have is difficult. Roughness is how much manual work must be done to make the solution work. The more roughness, the less work to create the solution and the less costly it is. For smaller solutions and smaller budgets more roughness is appropriate. Larger, customer facing, solutions require less roughness.

Finding solutions that match the amount of roughness the organization can afford and tolerate is a difficult balance.

### **Key #7: Look for ways to use component-based construction**

Most organizations are used to building applications in big blocks. Screens for Web sites are put together in one large block. SharePoint, however, has a different paradigm. It encourages a large repository of reusable components that are assembled to form the pages of a site. The Content Editor Web part and the Page Viewer Web part are great examples of how a few simple tools can be used with creativity to create very complete solutions.

However, with a development team schooled on developing in large monolithic systems which are assembled one page at a time, it might be difficult to break the thinking to get into the mindset of a page as a collection of fragments and a site (or context) as a set of pages. Try to break down any page that is being built into a set of small components that can interact with each other.

### **The right combination**

There's no one formula for making a SharePoint site. There's no one way to run a SharePoint Project, but hopefully you've got a perspective for some of the key things that you can do to make your SharePoint project a success.

### **About The Author**

Robert Bogue, MCSE (NT4/W2K), MCSA:Security, A+, Network+, Server+, INet+, IT Project+, E-Biz+, CDIA+, is president of Thor Projects LLC, which provides SharePoint Consulting services to clients around the country. He has contributed to more than 100 book projects and numerous other publishing projects. His latest book is The SharePoint Shepherd's Guide for End Users. (You can find out more about the book at [www.SharePointShepherd.com](http://www.SharePointShepherd.com).)

Bogue has been part of the Microsoft Most Valuable Professional (MVP) program for the past 5 years. He was most recently awarded for Microsoft Office SharePoint Server. Before that, Bogue was a Microsoft Commerce Server MVP and Microsoft Windows Servers-Networking MVP.

Bogue runs the SharePoint Users Group of Indiana (SPIN, [www.spindiana.com](http://www.spindiana.com)), and he is also a member of the steering committees for the Indiana Windows Users Group and Indianapolis .NET Developer Association. In addition to speaking at local and regional events, Bogue speaks at national conferences. He blogs at [www.thorprojects.com/blog](http://www.thorprojects.com/blog), and you can reach him at [Rob.Bogue@thorprojects.com](mailto:Rob.Bogue@thorprojects.com).