Crafting an Intranet: The Art and Practice of Creating a Successful Corporate Portal

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About the Author

More from the SharePoint Shepherd
**Introduction**

What follows is a collection of articles originally written for various publications over the past eight years. The articles have been reedited to fit this book form, and updated to reflect advancements since their first publication, but are largely untouched from their original form. The articles included here were selected because they explore the soft skills and less obvious, yet critical, parts of successful intranet projects.

All too often, corporate portal projects fail or achieve lackluster success. The portal gets created, and documents get placed there, and messages get posted, but the portal never becomes the central communication hub that was envisioned. The corporate intranet never achieves its potential in the enterprise and the enterprise misses opportunities for productivity, efficiency, collaboration, and knowledge management.

What begins as a grand plan to enhance the entire organization’s communication and collaboration is handed to the IT department because it involves the installation of software. Everyone believes that “If you build it, they will come.”

But it isn’t that simple. Crafting a corporate portal—one that will become the hub of communication and information for the entire organization—requires much more than installation.

In this book we evaluate the cost and methods of measuring the return on the investment. We explore ways to build trust and engage executives and users to ensure their commitment to the creation of a corporate intranet that everyone *will* use, and *will want to use*. We also delve into strategies for building sensible
navigation and user interface design that are both cost effective and user friendly.

If you’re looking for another how to book, this isn’t it. If you really want to understand the art of engaging the user and are committed to crafting the tools for organizational change, I hope this book provides you guidance and inspiration.
Follow the Shepherd and
Receive a Free Quick Reference

Looking for more tools to help make the most of SharePoint?

Go to www.SharePointShepherd.com/FollowTheShepherd and sign up to receive a FREE User Interface Quick Reference. The User Interface Quick Reference is a handy tool that you’ll want to keep within reach – it explains the most commonly used SharePoint Navigation and Action Controls. You’ll also receive the Shepherd’s monthly newsletters packed with more tips to help you achieve greater productivity and efficiency with SharePoint.

Your feedback is welcome. We're always looking to hear about the challenges you are facing. Drop us a note at Shepherd@SharePointShepherd.com to let us know the challenges you’re facing in your SharePoint environment.
**Get the SharePoint Shepherd’s Guide for End Users**

The SharePoint Shepherd’s Guide for End Users is available for SharePoint 2013, 2010, and 2007 and is an essential tool to enable your organization to maximize the value of SharePoint and help users be more productive.

Users receive step-by-step lessons via on-demand videos and on-screen instructions. Each video is only a few minutes long, however, in total there are over 3 hours of videocasts in each edition. Make the SharePoint Shepherd’s Guide for End Users a living part of the conversation with your users - allow users to comment on what they're struggling with, add their own tips, and suggest or write new content with the wiki in *The SharePoint Shepherd's Guide for End Users: 2013*. The Wiki installs on a workstation and can then upload the contents of the Guide to your local SharePoint server or to Office 365.

The Cost of Changing to SharePoint

We’re not talking about the cost of migration tools. We’re not talking about the servers that you’ll have to buy or even the licensing. The true cost of changing to SharePoint is the people costs.

The costs are in the cost of the change itself. They don’t change from product-to-product, but the cost of change is real. Let’s take a look at what it takes to keep from being a victim of the trough of reduced productivity.

It Gets Worse Before It Gets Better

In moving to SharePoint we’re trying to make folks more productive. It should be easier to find information, not harder. It should be easier to review versions, not harder.

However, no matter how good a training program you’ve got, it is going to get worse before it gets better. Hopefully, it gets much better, and the time that it’s worse is small. Take a look at the graphical representation below of how the process of change works.
There are basically two reasons why change reduces productivity. First, there’s confusion. Confusion causes most people to stop, or at least slow down. Think about what happens when you’re driving along and the person ahead of you doesn’t know where they’re supposed to turn. They’ll automatically slow down. Confusion happens both ahead of and behind any training you might do.

The second reason for the reduced productivity is the retraining. That is that it takes time to train on new things and that time reduces the overall available time for productive work. It’s important to note that this productivity reduction impacts multiple people. In an instructor led situation the instructor’s productivity is consumed by the training process.

It’s interesting that confusion shows its impact twice. Before training, as worry sets in and people wonder, “what does this mean for me?” and after training, as users try to make sense of the training they’ve received.

They try to translate the examples in class into what they do every day. This is a normal part of the sense-making process.

Shrinking the Trough

One of the most common ways to attempt to shrink the trough of reduced productivity is to skip training all together. The reasoning is simple. It costs money, it takes time and we can’t clearly see the specific benefit, so let’s eliminate it. The key problem is that it elongates the confusion time dramatically and makes the trough both deeper and wider.

Some organizations err in the other direction and send everyone in the organization to half-day training on SharePoint. The result: the training, coaching, and mentoring component of the downward slope of the trough is huge. The argument is that the confusion is reduced and the climb out of the trough is quicker.
This is possible, but it’s not guaranteed.

There are two keys to shrink the trough: open, honest, direct communication and targeted training, coaching and mentoring.

Open, honest, direct communication reduces confusion (and concern), thereby reducing the downward slope before the change and after training. Users know they’re getting the straight story and they know they can ask for help, so they don’t worry about it.

Targeted training optimizes the time spent and focuses the users on what they need to know to operate SharePoint (not everything SharePoint can do but what they need to know to make SharePoint do).

**Open, Honest, and Direct Communication**

Change is threatening. It challenges the comfortable status quo. Ultimately it means that something may have to change for every individual person. It’s personal (or rather it should be).

All too often when we’re talking about SharePoint implementations, we build presentations around the benefit for the business: improved efficiencies, reduced cycle times, and return on investment. However, individuals don’t know how they’ll adapt or if they’ll even need to adapt. In other words, they don’t know if they’ll be eliminated by the solution.

If you’re implementing a new system on top of SharePoint that will eliminate positions, you’ll have to say that. You’ll have to be direct.

Of course, you’ll want to talk about shifting things around to protect the valued employees (all of them). If you’re not open to discussing things openly, then everyone will worry more about what it means – reducing productivity.
If you’ve ever sensed that someone isn’t “shooting straight” with you and you’ve spent hours and hours trying to figure out about what or why, you know what will happen if you’re not direct with the users.

**Targeted Training**

Training users on a new system is a delicate balance. They need to have enough to know the system.

Too much and they’ll get bored. Too little and they’ll be lost.

What’s worse is that the needs of each user will be different. If you try to use the one-size-fits-all method for training, you’ll invariably end up training some users too much and other users not enough. That’s why you have to target train, so that you’re offering only what the user needs to know and not more.

This is where coaching and mentoring can come to the rescue. While they’re not traditionally thought of as training, they’re a part of the mix of helping a user become effective with a system.

By making coaching and mentoring services available, you allow users to get some baseline training and then ask for on-demand training. Of course, you can supplement this with reference materials like the SharePoint Tutor as well. Ultimately providing some standardized baseline training either a computer based training (CBT) or Instructor Led Training (ILT) and then supporting that with coaching, mentoring, and reference materials, you can minimize your training costs and reduce the trough of reduced productivity.

**On the Other Side**

Getting through the trough of reduced productivity isn’t impossible or even difficult. You can get there by being open, honest, and direct with your communication and by creating a
training plan that minimizes the effort for the user, and the confusion they’ll experience on the other side.

The better you can deliver your communications and your training, the sooner you'll be reaping the benefits of your new SharePoint implementation.
4 Tips for Engaging Your Executives in SharePoint

You may have snuck SharePoint Foundation 2010 under the radar, or it was an official but unfunded project. You’re trying to figure out how to get the support you need for the new intranet the organization needs or to extend it to the Internet so you can get partners engaged and get some real value from the platform.

However, you can’t seem to find an executive sponsor to drive the project forward.

All of the “experts” keep saying that you need to get executive sponsorship or executive buy-in, but they’re noticeably absent on how to make that happen. So here are four tips on how to get your executives to buy into SharePoint:

1. It’s not about SharePoint and it’s not about technology. What I see most frequently when people are having trouble selling SharePoint to executives is that they’re trying to sell SharePoint. The word “SharePoint” simply shouldn’t come up in your conversation with an executive.

I understand that’s what you believe the solution is, but the executive doesn’t care what the solution is. Executives have a set of organizational problems and they don’t care whether it’s SharePoint, .NET, PHP, or voodoo that solves them. (As long as it’s not their head that gets shrunk.) Don’t speak of technology or SharePoint unless you get a specific question from the business about how you’re going to make it happen.

2. Find a real, tangible, and urgent business problem, and then talk about it. Executives are paid to solve organizational problems. The more tangible or concrete the problem, the easier it is for them to commit to a solution. The more urgent it is, the more willing they will be to commit to the solution quickly.
The good news is that SharePoint can be used to solve a wide variety of problems, so you have a huge palette of options to draw from. For example, you might want to look for the CEO whose email to an attorney, with sensitive information, was intercepted. Then talk about secure collaboration with attorneys, CPA firms, and other trusted advisors via SharePoint as an extranet.

Or perhaps find the HR person who’s struggling with employee retention and explain how employee surveys can help pinpoint the retention problem, and how employees who feel more connected to the organization through having a portal for news are less likely to leave.

Maybe you should wander by the VP of research and development’s office to find out about their project management or knowledge capture needs. Then you can explain how to reduce the burden of analyzing a mountain of test data.

If you don’t know how to get started, sit in the break room and listen to the complaints and frustrations of your co-workers. Often the issues of the organization are discussed more candidly in the break room than in the board room.

3. Propose a solution, or, at the very least, a partial solution. To the business, what is needed is more than a tool, it’s more than a platform, and it’s a solution that’s necessary. You can’t just say, “Let’s install SharePoint.”

You have to explain how the solution fits together to solve the problem. You might know the solution when you walk into the executive’s office, but don’t propose it immediately. Offer to think about the problem and propose a solution later.

In the case of the sharing information problem, you want to propose that the entire solution includes getting the external users set up, managing their passwords, and training both
internal and external users. Ideally, when you show the solution, you’ll want to have a mock up, prototypes, or a sample SharePoint site to demonstrate how the solution will work. This makes it real.

Sometimes, as IT people, we forget that even partial solutions to problems can have value. We’re taught that we have to solve the problem completely. The business realizes that sometimes partial solutions are valuable too. If you can solve enough of the problem to add value, that’s enough. Do, however, make sure that you’re direct about the parts of the problem you know you can’t solve.

4. Do your part. Dropping off the beautiful solution in the executive’s office isn’t the last step. The last step is to follow through. Remember, executives are busy people. You’ll need to follow up on the plan, ask what’s missing, learn more about the problem, and perhaps modify the plan to support new things you’ve learned. The good news: Once you’ve solved one problem for an executive, they’ll likely come back to you for their next challenge.

You might find the support you need for your SharePoint collaboration or intranet project--but you might find that support not because of SharePoint but because you’re using SharePoint to solve a business problem that an executive cares about.