



NUCLEUS
RESEARCH

GUIDEBOOK

ASSESSING MICROSOFT SHAREPOINT MATURITY AND SOCIAL PURPOSE

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THE BOTTOM LINE

Although Microsoft SharePoint Portal Server has been on the market for more than 10 years, many companies' SharePoint deployments are still fairly immature, meaning they have not fully capitalized on their investment in an enterprisewide collaboration platform. Nucleus found companies could evaluate their SharePoint deployments based on adoption, governance, technology, and strategy to identify opportunities to increase returns from SharePoint. Companies with mature SharePoint deployments and clearly defined social purposes are ideal candidates to take advantage of NewsGator. In many cases, Nucleus found that companies adopting NewsGator Social Sites were able to accelerate their SharePoint maturity and increase user productivity and engagement.

THE SITUATION

Although many companies have adopted portal technologies such as Microsoft SharePoint to promote collaboration and information sharing, a relatively small percentage of SharePoint adopters have taken advantage of all the capabilities in the platform. Although SharePoint provides a framework and some tools for collaboration, just like any enterprise collaboration effort, it still requires some developer effort and investment in user adoption. A mature SharePoint effort requires initial and ongoing investment in adoption, governance, technology, and social collaboration strategy to deliver maximum returns.

Many companies that are struggling to get the most from their investment in SharePoint are also considering how they can take advantage of social collaboration capabilities. Business users who are now used to social collaboration because of their consumer experiences with applications such as Facebook are exploring the potential adoption of similar practices in the workplace. In fact, many have looked to free social collaboration applications to replicate Facebook at work, which presents challenges for governance and compliance because of its lack of administrative and security tools.

Nucleus has found social collaboration adoption often raises concerns about general content governance and compliance for SharePoint content managers and administrators who haven't established or operationalized a clear content governance model.

This Guidebook explores the challenges organizations face today in driving productive social collaboration, outlines some of the key areas companies should evaluate as they evaluate their overall SharePoint maturity, and identifies areas where companies have used technologies such as NewsGator to accelerate their SharePoint maturity.

NEWSGATOR

NewsGator Social Sites is an integrated social networking and collaboration application specifically for Microsoft SharePoint users. Social Sites runs as a managed service directly within SharePoint. It gives users the ability to create and maintain social profiles, create collaborative communities, and push content such as microblogs to other users. Administrators can maintain and manage that content within SharePoint's document repository structure, security, and authentication model.

NewsGator components include:

- Social networking capabilities such as the ability to create and maintain individual social profiles, the ability to create and follow activity streams, and the ability to microblog and archive those blogs in SharePoint.
- Templates for rapidly connecting groups with similar interests, projects, and initiatives. NewsGator Spheres also provide the ability for individual users to create public or private groups for sharing content and links and bridging external and internal conversations.
- Activity reports and dashboards enable administrators and managers to track and understand how the collaborative capabilities are being adopted and used.
- Web, desktop, and e-mail clients enable NewsGator users to participate in communication and updates without logging in to NewsGator. Integration with Microsoft Lync lets individuals include recorded video, audio, and instant messaging in SharePoint repositories, and Glassboard integration lets individuals engage in collaboration using their mobile devices.
- Lookout, a new user interface that enables users to prioritize and multiple streams in the way that is most useful for them with personal and multi-column views.
- A learning module, Enrich, which integrates video into overall social collaboration with scenario and situational-based training videos.
- SP2 Connector, which connects internal and external SharePoint instances.

Nucleus found companies with an existing SharePoint deployment could effectively bridge the gap between their portal infrastructure and user collaboration demands by using NewsGator to accelerate the maturity of their collaboration environment. To better understand the profile of companies that might benefit most from a NewsGator investment, Nucleus identified four key SharePoint maturity areas for assessment: adoption, governance, technology, and strategy.

ADOPTION

If users don't adopt an application, the return on investment will always be negative. In fact, Nucleus has found that breadth and repeatability are two key factors driving the greatest ROI from technology projects (Nucleus Research *b20 - ROI quick reference guide*, May 2001): more users actively adopting an application mean more potential

opportunities for benefit. One of the key measures of SharePoint maturity is how many individuals and groups are using it as a collaboration platform. Nucleus found NewsGator Social Sites customers took advantage of its features to drive greater adoption. Additionally, NewsGator's out-of-the-box SharePoint integration helped reinforce the use of SharePoint as a company's common collaboration infrastructure and reduced the use of viral social collaboration applications. Customers said:

- *"Predefined community templates sanitize the complexity of SharePoint to a user. Community managers can focus on the content, not at being adept at SharePoint."*
- *"People in disparate offices and with functionally different roles are having conversations about special interests – it builds communities and connections outside your normal group."*

To evaluate SharePoint maturity in terms of adoption, key questions to consider include:

- the current breadth and repeatability of SharePoint use
- availability and depth of training for general users and community managers
- number of use cases associated with specific SharePoint functionality such as TeamSites
- company investment in adoption and change management efforts
- support for user self service in establishing workflows and publishing content.

Levels of adoption vary by organization. However, Nucleus found that the typical active user population in immature SharePoint deployments is fewer than 15 percent of potential total users. Nucleus found that companies that used NewsGator to increase their maturity typically increased active user adoption by 20 percent in the first six months; some saw even greater adoption rates.

Companies Nucleus analyzed that used NewsGator to increase their maturity typically increased active user adoption by 20 percent in the first six months.

GOVERNANCE

In general, more mature SharePoint deployments have clearer, more consistent governance and compliance models and processes. As tactical collaboration and content sharing become a part of companies' electronic communications of record, legal and compliance officers are recognizing the need to have a standard policy for managing unstructured content. Nucleus found that NewsGator Social Sites could provide users with social collaboration while taking advantage of the structure, security, and authentication models within SharePoint:

- *"We control the security and access points, and have all the IT compliance stuff managed."*
- *"A lot of people had jumped onto Yammer and we recognized the need for that type of collaboration capability but had security concerns."*

- *"We had made some of our legal folks very nervous with social apps that were software-as-a-service, because we didn't have the process and control procedures in place for user identity management."*
- *"It's inside our firewall, based on SharePoint 2010, and all the content lives in the same world so we can control the security and the access points."*

To evaluate how mature a SharePoint deployment is in terms of governance, companies will need to consider how involved their legal department is in their content management strategies and how important compliance, e-discovery, and records and storage management are to their industry. Nucleus found companies in more regulated industries were particularly sensitive to the challenges of e-discovery and compliance as they related to social collaboration, and found the NewsGator-SharePoint integration a means to facilitate more effective governance.

TECHNOLOGY

Nucleus has seen a number of SharePoint upgrade and reimplementation projects and has found that more mature SharePoint deployments begin with a commonly-established structure and schema for managing and searching content (as opposed to departmental or ad-hoc file sharing) and an expert team or systems integrator to map business processes and practices to a collaboration structure. More mature SharePoint deployments also tend to be on a rapid upgrade schedule because they are in a position to take advantage of the new capabilities in the latest version of SharePoint without a significant rework.

Nucleus found that in many cases NewsGator customers were able to accelerate their SharePoint maturity and reinforce SharePoint's usefulness as a single unified collaboration platform through their use of NewsGator. Many considered building custom applications on SharePoint and waiting for future SharePoint releases, but found they could gain the most value from adding NewsGator to their SharePoint environment today:

- *"Building a tool on SharePoint would have been a significant investment in development time."*
- *"We had SharePoint but had multiple environments, tools, and custom integration bridges."*
- *"It would be a very complicated application to build."*
- *"If we had to invest the time to develop it ourselves we would have moved much more slowly than we did."*
- *"We've been trying to stay away from custom development. The economic and strategic direction of the company was such that we wanted to go with more out-of-the-box applications."*
- *"Next year we're doing an enterprise content management project to stop the sprawl of data and determine how we have a single library of all publishable documents across business units, marrying the content with business processes and layering social on it."*

To assess their maturity from a technology perspective, companies should consider how much they consider themselves a “Microsoft shop,” as this was also a key driver for SharePoint maturity. Today, most companies have integrated some external applications and data sources within their SharePoint environment or posted links to enterprise systems on SharePoint sites. However, few have fully integrated data warehouses or external data such as partner or supplier information.

STRATEGY

The most mature SharePoint deployments have a clearly articulated strategy for business collaboration and also followed a number of best practices for effective SharePoint adoption, including communication, community management, focus on specific use cases, and user recognition.

Communication drives awareness and engagement

More mature SharePoint deployments included strategic communications and ongoing marketing of the application – above and beyond typical internal corporate communication efforts. NewsGator Social Sites provided the technical capabilities for users to more fully adopt collaboration, but Nucleus found the most successful SharePoint users also had a strategic communication plan to ensure effective adoption. As one customer said, *“IT doesn’t drive adoption, internal communications does. We’re running a lot of communications campaigns to drive grassroots adoption.”* Companies considering deploying NewsGator Social Sites should identify champions as well as potential resisters and make both targets of communication efforts.

Community management drives usability

The easier it is for end users to self-identify and build communities of interest, the easier it will be for them to collaborate. NewsGator templates provide the first step, making it easy for non-technical users to build groups. Nucleus found that identifying specific champions – particularly good communicators among the executive team – to promote communities is one effective strategy. The most successful champions are:

- Individuals with technology savvy who are likely active on Twitter or LinkedIn today
- Storytellers that can link tactical activities to corporate goals and clearly articulate the organization’s social purpose in measurable terms
- Team players who understand the dynamics of the organization and seek to promote others’ ideas as well as their own

Specific use cases drive tactical understanding

Nucleus found that business users with little social networking experience responded best to training and communication that included specific use cases of NewsGator Social Sites with clear benefits. Project status updates and corporate communications are two such examples that can tangibly show users how NewsGator Social Sites reduces e-mail and increases productivity.

Recognition drives adoption

Just like in consumer social networks, recognition drives adoption – and users are more likely to contribute if they are readily recognized for it. At one NewsGator customer, for example, the CEO reposted an item from an employee's blog he thought was particularly compelling. Other companies were successful with more structured badging recognition programs, a capability also available within Social Sites.

Companies gauging their SharePoint maturity from a strategy perspective should be considering all four areas to identify potential opportunities to accelerate their maturity and increase returns from their SharePoint investment.

CONCLUSION

Many companies have invested in Microsoft SharePoint as an infrastructure for collaboration but have found that it requires significant IT and management investment on an initial and ongoing basis to drive effective collaboration. This has been true of business applications since many companies' first efforts at knowledge management more than a decade ago. The difference today is the user-driven demand for social collaboration and willingness to self-identify, communicate, and share with others in the organization – even if they do not know them well. Nucleus found adopting NewsGator Social Sites helped organizations accelerate their SharePoint maturity and maximized value from their SharePoint investment.

Increased SharePoint maturity is not just about driving greater social collaboration. It enables companies to focus less on technology and adoption and more on optimizing processes and driving more productive collaboration. Companies with SharePoint today that are considering a social collaboration strategy should review their SharePoint maturity in the areas of adoption, governance, technology, and strategy and consider the potential capabilities of NewsGator to accelerate their maturity, clarify their social purpose, and ultimately maximize returns from their SharePoint investment.