



## **Six Critical Success Factors for SharePoint Enterprise Content Management (ECM) Implementations**

In a growing number of organizations SharePoint is the Enterprise Content Management (ECM) system of choice. This requires framing a consistent enterprise perspective on how content should be organized and managed. Enterprise-wide implementations of SharePoint require a carefully planned rollout in order to achieve the organization's objectives.

The factors below are among the most important ones to consider in deploying a SharePoint ECM system:

- Strategic Phasing
- Effective Governance
- Right Initial Projects
- Right Resources
- Right Methodology
- Continuous Learning

## Strategic Phasing

Deploying SharePoint as an ECM system is a big project that must be phased, as a strategic initiative, over several years. It is helpful to plan for each of the following phases:

- Pre-implementation – Define vision and strategy
- Early Wins – Quick wins with limited scope generate momentum
- Controlled Deployment – Quickly evolve and extend IA standards
- Federated Deployment – Authority over site-collections distributed across the organization
- Business as Usual (BAU) – SharePoint ECM is operational and functional

GOOD INITIAL  
PROJECTS ARE CROSS-  
DEPARTMENTAL,  
PROCESS-ORIENTED,  
AND INVOLVE  
MULTIPLE FUNCTIONS.

Business stakeholders should be involved in early envisioning and strategy and in developing the roadmap. You will need broad support for the program investment, but more importantly, senior level agreement on priorities is essential for a successful outcome.

Building early business support is also the first step in ensuring alignment with a future governance model and commitment to the behavioral changes required to achieve outcomes.

## Effective Governance

Effective governance is not achieved quickly, as a result of a single short-term governance project. It involves mobilizing many parts of an organization; and it changes over time. Most people who are going to be responsible for an ECM initiative recognize that their project needs governance. The question is where to begin.

In the pre-implementation phase, governance questions concern the execution of the ECM program. The focus is on roles and responsibilities, including both operational duties and decision rights relating to many dimensions of information management, including information architecture (IA) standards.

In the Early Wins phase, it is important to move quickly, with light standards that will evolve during the design of target sites. Standards quickly evolve, as enterprise concepts emerge. For example, one utility

company with multiple installations did not have a consistent way of designating location, which severely impaired findability across the enterprise. Standardizing this term during an Early Win project brought enterprise-wide value to the SharePoint ECM system very quickly.

As an organization moves from the Early Win phase to Controlled Deployment, the governance focus shifts to change management. During the broader federated deployment, enablement and alignment become key. Finally, when the organization is in “business as usual” (BAU) mode, the emphasis of governance is on compliance. Therefore, organizations should keep in mind the fact that governance is a dynamic process that evolves along with the implementation.

## Right Initial Projects

The purpose of Early Win projects is to address a business problem for which deploying SharePoint can create very quick value. It should have a relatively limited scope, reflect a clear need, and provide significant business value.

The project should also drive the information architecture, however. Therefore, it should not be too limited, or focused on a single specialized application. Good early-win projects are cross-departmental, process-oriented, and involve multiple functions.

This approach leads very quickly to insights about needs at the enterprise level. It builds competencies and design patterns, and helps foster visibility beyond a single department. In addition, it promotes early user engagement and enthusiasm. Achieving business value within three to four months is necessary to sustain interest and commitment. After the first iteration, when an initial framework is in place, new value results even more quickly.

## Right Resources

Engaging a core group of people who will have an enduring responsibility for the SharePoint ECM system is critical. SharePoint leadership, business participation, and a core team are the key ingredients. Experienced leadership on the technology side should include SharePoint

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specialists, along with information architects, governance facilitators, security analysts and others technical experts.

A strong business sponsor and participation from business users is also essential. The best approach to getting participation is to emphasize that they need a place at the table to represent their interests. Business users involved in design, governance, and change management invest in achieving results.

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Engaging the business should have a “crowd source” feeling, and not just result from interviewing a few subject matter experts. The core team should include power users, site administrators, and candidate staff for a Center of Excellence. Ideally, the organization will end up with an active community of site administrators and many of the power users may evolve into site collection administrators. Their expertise will grow over time.

The Center of Excellence (CoE) is an important concept. This group helps keep the ECM on track, supporting the maintenance and growth of the initial vision. The CoE can be a separate administrative unit or it can be virtual. Nevertheless, on either approach it needs leadership and requires people who have designated roles and stay committed for some period.

## Right Methodology

At one level, methodology is a set of guiding principles that characterize the way an organization approaches ECM deployment. Each organization must come up with its own principles.

Besides this set of guiding principles, there also needs to be a relatively simple and repeatable methodology for each major step of build-out. For each step there needs to be a methodology that will keep the team on track.

Information architecture in SharePoint should not be thought of a system to be configured, but as a way of describing the world in which the business can function. From there, formalize that description to a point where it can be technically analyzed for how should it be represented within SharePoint.

At the next level, however, EIS's methodology involves the following steps to get to SharePoint IA configuration (other steps follow):

- Mobilize a project team with end-user involvement
- Build team familiarity with content and use cases
- Facilitate collaborative user-centric design
- Transition to SharePoint technical IA

Each step involves specific expertise and work products.

## Continuous Learning

SharePoint offers extensive functionality for enterprise content management, but in order to exploit its potential, training is essential. End users who are performing basic tasks such as storing and retrieving content require training – the toolset is too complex for people to pick up the necessary skills on their own.

Power users, too, need training and at a higher level. These users are a great asset to organizations and, ideally, are located throughout the organization so their expertise is readily shared. Site collection administrators need training in order to be qualified for the role, and will need to be engaged on a continuous basis to maintain and expand their knowledge.



Because of all the learning that is involved in SharePoint use, communities of practice often develop in larger companies. Such groups are very good at sharing knowledge and discussing issues ranging from specific technical topics to dealing with change management.

Even with a clear vision and a strategic plan in place for a SharePoint ECM system at the outset, the system will inevitably evolve over time. Requirements will change, governance will change, and even the software will change. Therefore training is not a one-time event but is an ongoing process and integral part of the implementation.

## About EIS

**Earley Information Science (EIS) helps organizations harness the value of one of their most important assets – information.** *We improve enterprise information agility to drive digital commerce innovation, increase revenue, and enhance customer experience with a strong enterprise information architecture and management foundation. EIS helps make information more findable, valuable and useable — thereby helping organizations improve operational efficiency and effectiveness. EIS has over 20 years of experience in working with Fortune 1000 organizations globally across many industries, including manufacturing, retail, financial services, healthcare, life sciences, the public sector, and professional services.*

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