CHAPTER 1

YOUR COLLABORATION STRATEGY: ENSURING SUCCESS

You've decided to make an investment in Microsoft Office SharePoint Server (MOSS) 2007. Congratulations—you have a powerful software platform in your hands, capable of delivering high-impact collaboration solutions. Now how do you make it work optimally? MOSS is simple to set up and use but difficult to get right, mainly due to its sheer power.

If you're a developer, you probably already own a SharePoint programming book or MOSS API guide (or are looking for one). This is not a book about SharePoint programming. However, this book is the ideal companion to your development guide. It will give you some of the "why" of MOSS and help you understand your organization's business needs and how they might be addressed using MOSS. Developers will find this book useful when building solutions (in conjunction with an API guide) because there are important business considerations that are critically important to every MOSS-based solution.

If you're a project manager, consultant, or business analyst, you'll find that this book helps with all the intangibles of a MOSS rollout. For example, "What roles should exist to support MOSS?" or "What should my offline/search/business data strategy be for MOSS?" This book also introduces you to some key technical concepts and provides simple walkthroughs of the key features that many businesses need to leverage.

Specifically, this chapter provides a critical foundation for your MOSS-based solution and lays the groundwork for the rest of the book. It includes a comprehensive overview of the fundamentals of the Office SharePoint Server 2007 architecture; a discussion of strategies for moving from the current version of SharePoint Portal Server (2003) to the new 2007 version; a review of information architecture best practices; and explanations of how to optimally leverage MOSS's collaboration, offline, search, business process, content management, and business intelligence features.

This book also includes an appendix for end users describing how to execute the top 20 end-user tasks in MOSS.

So put away Visual Studio and Office SharePoint Designer for a moment. Take a breath and a step back. Start thinking about why your organization needs MOSS and how you know you'll be successful after your solution is deployed. Software is expensive to purchase and integrate. If you want to build a successful solution, you need a carefully defined plan. A MOSS solution, especially one that serves as your corporate intranet, is implemented to provide the single interface that integrates all enterprise information and applications.

MOSS provides a convenient and often personalized way for your entire organization to find the information and tools each individual needs to be more productive. However, the use of the MOSS solution cannot often not be mandated in the same way that the use of a new accounting or payroll system can be mandated to process an invoice or generate paychecks. MOSS users usually have other options for accomplishing the tasks MOSS enables. For example, MOSS may provide a convenient summary of financial information about a project that might also be available by looking at existing reports generated by the financial system. The MOSS solution may be more convenient and efficient but not necessarily required to surface the project financial information. The MOSS solution may also include "subportals" or online collaborative team spaces where users can efficiently share documents to minimize email traffic and ensure that everyone on the team always has the latest version. But users might still e-mail documents back and forth to collaborate, resulting in an unorganized collection of documents and correspondence that is not reusable by other team members. These are some of the many reasons why it is so critically important to have a clearly articulated business strategy for your new MOSS portal or collaboration solution. Practical experience indicates that technology has only a small impact on the success of MOSS solutions; organizational and political (process and people) strategies have a much greater impact. As a result, a comprehensive MOSS strategy is vital for success.

You should consider several key elements in your MOSS strategy:

- **Who are the key stakeholders?** This might include the CIO, a knowledge officer, or key business leaders in areas such as corporate communications, marketing, and human resources, among others.
- **What are the critical business objectives for the key stakeholders?** In other words, what keeps these executives awake at night? How can the MOSS solution address these key business objectives?

- **How will the organization as a whole measure the business success of the MOSS initiative (or initiatives)?** In other words, which key business goals does the MOSS solution address? Remember, successful portals do not just need to be free of software defects. Successful portals must be designed to have an impact on key business objectives, or the challenges of ensuring user adoption cannot be overcome. A successful MOSS solution may also include more than one departmental portal that may be consolidated (or not) as an enterprise portal. It may not always be appropriate to have a single portal project, but all portal projects need to be measured by business success.
- **What governance processes need to be in place to ensure that all of the MOSS users are aware of and accept their roles and responsibilities with regard to the MOSS solution?** The governance model for MOSS solutions should include a statement of the vision, guiding principles, policies, roles and responsibilities, and procedures for using MOSS in the given environment.
- **How do you plan for both the design and ongoing maintenance of the content in MOSS?** Accurate and relevant content is the foundation of a MOSS solution. A good strategy needs to include a plan to ensure that content remains relevant over time.
- **What type of rollout strategy should you pursue? What types of communications and training do you need to provide for users?** A rollout strategy needs to prepare both users and content for the new MOSS solution. It also needs to include a communications plan to make sure that users are aware of and, ideally, eagerly anticipating the business value of the new MOSS solution. In addition, the strategy needs to include a plan for launching the new solution and training users. Training needs to be specifically targeted to each stakeholder or user community to ensure that users are optimally prepared to leverage the new solution.

Key Stakeholders

In many organizations, the Information Technology (IT) group is separated both physically and emotionally from the organizations they are designed to serve. Given that the success of MOSS solutions is critically dependent on business user adoption, it is imperative that business stakeholders take an active role in portal design and governance planning. One way to ensure that your MOSS project will fail is to have IT build the solution without engaging a broad spectrum of potential users. Early portal and collaboration projects were primarily driven by IT organizations, and many of these early initiatives failed to gain acceptance by users because they were essentially IT projects. Today, more and more portal and collaboration projects are driven (and funded) by business users. Many intranet projects are sponsored by the corporate department responsible for internal communications. One or more business units may fund and drive an external or customer portal initiative. As a result, it is critically important for IT to work with the sponsoring business unit as well as all key stakeholders to ensure that the inevitable trade-offs that will be made during the MOSS design and development are made in favor of the business stakeholders as often as possible. MOSS provides an important opportunity for IT and business owners to collaborate. IT managers who fail to take advantage of this opportunity put their projects and potentially their careers at risk.

Who should your key stakeholders include? Clearly, the executive for the sponsoring organization is an important key stakeholder. This individual will likely be your project sponsor. For intranet portals, this is often the Director of Marketing or Internal Communications. For extranet portals, this may be a key executive in an operational business unit. Your stakeholders should also include representatives from your major organizational units, both internal and customer-facing. When you look to identify stakeholders, recognize that there are different types of stakeholders, all of whom should be included in the development of your strategy and ongoing governance model. Many of these stakeholders will also be included in your requirements definition process. Business executives should be included in the stakeholder community to provide overall direction and validate that the MOSS deployment is critical to achieving business objectives. IT managers should be included to ensure that the solution meets IT standards for operations and development. Content providers (internal departments such as Human Resources, Finance and Accounting, Legal, and so on) should be included because the portal will become a critical communications vehicle with the rest of the enterprise. End users ("rank and file") should be included to ensure that the MOSS solution rollout addresses more than just executive objectives and concerns. Remember that while the executive sponsor may have the "grand vision" for the solution, the solution end users are critical to the ultimate success. End users need the solution to be easy to use in the context of their work and need to be able to see what's in it for them. For example, the key stakeholders for a portal project to support a university should include administrators, faculty, and students. In addition, if the portal is externally facing, the "customer" community might be represented by examining the perspective of an applicant to the university.

Once you've identified your key stakeholders, it's important to engage them in the process of defining business objectives for the MOSS rollout.

Take Action

Getting buy-in from key stakeholders is important in a MOSS rollout. Be sure to do the following in your planning process.

- Be inclusive rather than exclusive as you identify key stakeholders. It's important to gather as much business user support for your solution as possible.
- Be sure to include "end users" in your key stakeholders. At the end of the day, these are the people who will help make your solution successful.
- In addition to traditional department or business executives, try to include employees who may not have the title but who are influential in the business. These people tend to have broad networks across the enterprise and can help drive your success because they are trusted by others.

Business Objectives

In successful MOSS implementations, IT and business owners carefully frame the MOSS project with clearly defined business goals and objectives that are used to guide the decisions that need to be made during the solution design and ongoing operations. More often than not, the key issues influencing the success of a MOSS solution are organizational and political. Technical issues rarely derail a MOSS project. As a result, it's particularly important to document why you are building the MOSS solution in the first place and to ensure that all key stakeholders agree on the objectives.

The first business objectives that should be considered as part of your MOSS strategy are the overall business objectives for your organization, such as improving profit margins, increasing revenues, cutting costs, improving customer or partner relationships, and so on. Your goal should be to tie the specific objectives for the MOSS rollout to one or more strategic objectives of the corporation. Doing so enables you to ensure that your MOSS project stays front and center in the organizational agenda and minimizes the risk of becoming "number 11" on the organizational Top 10 priority list. In other words, you want to avoid becoming the project that gets done "in our spare time," pretty much ensuring that the MOSS project is not a career-making experience for the people working on it.

In addition to these organization-specific business objectives, another set of common business drivers cause companies to implement MOSS. Some or all of the following business objectives will probably resonate for your organization. If you can tie these specific objectives to your overall enterprise strategic objectives, you will be in even better shape to ensure that the right amount of attention and focus are directed to your project.

- Provide easier and timelier access to the information employees need to get their work done
- Provide easier and more effective mechanisms to move work between business entities, such as self-service for customers or partners, enabling outsourcing by providing business partners with access to a collaboration environment or business data on an extranet
- Provide an organized "one-stop shop" for information by making it easier to find authoritative information
- Improve the ability to share and exchange information across the organization by providing an electronic publishing method that is easy for users to leverage
- Improve the "time to talent," the speed with which new employees become productive
- Maximize the reuse of best practices across the enterprise, enabling the organization to replicate successful business practices in all geographies
- Reduce training costs for enterprise applications by providing a consistent user interface to all applications
- Improve time to market for proposals and contracts by providing easier access to reusable assets
- Improve organizational learning by providing easier access to critical information and organizational memory

- Improve customer service by providing direct access to the information customers need
- Improve project execution by providing an opportunity for work teams to collaborate and to electronically store project information in fully searchable, organized team sites

It is critically important to document business objectives at the start of your MOSS initiative and to keep these objectives top of mind as you design and build your solution. Use the business objectives to help guide your decisions about which features should go in each release. Ask portal owners/stakeholders to prioritize their business objectives so that you optimally understand how to make trade-offs between alternative design approaches. Users often have a difficult time articulating requirements for MOSS solutions. This is because it is virtually impossible to envision how the solution will help solve business problems until users see the solution with “real” data. When users do express requirements, they may express them in a specific way, which may require a significant amount of custom coding. However, if you understand the objectives or outcomes they are trying to achieve, you may be able to accomplish the objective using “out of the box” functionality. You really can’t gather user requirements for MOSS solutions like you do for a traditional software development project. Instead, you should solicit and try to understand business objectives. You can then, as an IT design team, *derive* requirements based on the business objectives and outcomes. When a user learns that a requirement will cost $250K to implement, the requirement is often no longer “required.” Therefore, it’s important to ensure that you understand the strategic objectives for the company, the business objectives for MOSS in general, and the specific outcome objectives for each aspect of the implementation.

Take Action

Mapping your technical features to business goals is very important. Be sure to do the following prior to your SharePoint launch date.

- MOSS is a product with many features; don’t try to implement every one of them out of the gate. Identify three or four main features that will produce the most business impact, and do them exceptionally well.
- Articulate, well in advance of launch, the long-term vision associated with your solution and how the first delivery sets the stage.

- Set clear and reasonable expectations for all business users—encourage users to focus on the business outcomes they want to achieve. In your requirements gathering meetings, try to proactively explain how you can accomplish the business outcomes using MOSS "out of the box" features so that you can get a feel for whether this will be acceptable to the users. Use phrases such as "This is how we might accomplish what you are asking for in MOSS…" Your goal is to rapidly deploy a first release of your solution so that your stakeholders can see the solution "in action" with their content. You will probably find that it is only when users "meet MOSS" with their own content that they can start to envision additional functionality that will add value to the business.

Measuring Success

Even if you have carefully defined and documented your business objectives and engaged all levels of stakeholders in the solution definition and strategy process, the time will come when you will need to assess the value of your organization's MOSS investment. This process may have already started as part of the justification to build out the MOSS environment in the first place. Once the MOSS investment has been approved, however, a metrics program should be established so that you can demonstrate that the solution is meeting the business objectives. The metrics program should include more than simply capturing usage statistics, though usage statistics are one important proxy measurement for MOSS value. A good metrics program includes both qualitative and quantitative measures that tie the MOSS solution as directly as possible to business success. The metrics program also needs to start with established baselines for all measures. Portals and collaboration tools have started to become a more common part of IT infrastructure—sometimes even considered an infrastructure application, like email. However, despite increasingly wide acceptance, MOSS solution builders should be keenly aware of the likelihood that management will want to understand how MOSS is delivering against expectations. Having a metrics program in place provides an opportunity to monitor the solution deployment to ensure that usage is optimized. It also provides a basis for justifying enhancements in the future.

If you worked with your key stakeholders to document business objectives, you've already accomplished the first important part of your metrics program—understanding the business and stakeholder objectives. The next key step is to identify a potential set of qualitative and quantitative measures that can be used to identify whether and how MOSS is addressing these objectives. Qualitative metrics can be "discovered" from user feedback during quality assurance testing and initial training and on an ongoing basis. Solicit users' "stories" or anecdotes that describe how using the portal and/or collaboration tools (finding a person with an unknown skill, rapidly accessing previously difficult-to-find information, and so on) helped contribute to increased revenue or profitability, increased client satisfaction, or other metrics that are already reflected in the key performance measures for the organization. The following sidebar provides an example of an anecdote describing the value of a knowledge management portal for a consulting firm. Note that while the story is an example of a qualitative measure, it is a good story because it includes a quantitative value estimate that is defined by the "actor" in the story. With a quantitative "punch line," this story provides a much clearer demonstration of value than it would if no bottom line were presented. You should try to ensure that all of your anecdotal evidence of value includes a realistic value estimate.

Sample Qualitative Measure: Portal Success Story

I joined the organization on March 16 without previous experience. After one week of training, I joined a project team.

After one day of training on the project, I was assigned a task to learn a particular technology that was new to everyone on the team. I was given a bunch of books and told that I had three days to learn how to create a project using this technology.

In my first week of training, I remembered learning about the company's portal, which included a directory of people and their associated expertise. I found four people with relevant expertise in the portal and sent them an email asking for their help. One of them sent me a link to a document on the portal containing exactly what I wanted. *Instead of three days, my task was completed in half a day.*

Quantitative metrics can often be obtained from usage analysis reports, and while these metrics may not be a direct measure of value, certain measures can be used as a proxy for value. Table 1.1 suggests some possible quantitative and qualitative metrics associated with several of the business objectives described earlier.

Table 1.1 Suggested MOSS Metrics

Objective	Possible Measure	Capture Frequency	Issues and Challenges	Target
Maximize the reuse of best practices across the enterprise, enabling the organization to replicate successful business practices in all geographies.	Quantitative: Number of downloads of best practice or reusable assets. Qualitative: Usage anecdotes where users can describe in quantitative terms how a MOSS asset that they reused contributed to business objectives.	Monthly	Frequent downloads are a proxy for content value, indicating that the content is delivering value to users. Gathering anecdotes is a labor-intensive process and may require some creativity to obtain. You may want to consider a success story contest (with prizes) to get MOSS users to share high-quality success stories.	Look for an upward trend in the number of downloads for new content or new portals. Look for steady state activity in more mature environments. Targets should be set based on the maturity of the solution and the strategic importance of the content. Targets for success stories might be based on total "value" represented in the stories collected and/or the number of stories documented.
Improve time to market for proposals and contracts.	Quantitative: Average proposal or contract development time.	Ideally captured for each proposal or contract and then compiled (averages) on a semiannual or annual basis.	This measure will be easiest to capture if it is already a key performance measure for the enterprise.	Trend downward from baseline. Target might also be a specific percentage of time reduction.

Objective	Possible Measure	Capture Frequency	Issues and Challenges	Target
Reduce training costs for enterprise applications.	Quantitative: Total training costs for enterprise applications.	Annual	Some organizations justify their MOSS investment solely on the reduction in training costs. The assumption is that most users are not “power users” of enterprise applications. Instead of investing in full training programs for these users, you only need to train them in the use of the portal, not each enterprise application.	Percentage or absolute reduction in training expenses for enterprise applications.
Provide an organized “one-stop shop” for information for MOSS users that helps users reduce information overload.	Qualitative: Usage anecdotes where users can describe in quantitative terms how using MOSS has improved their productivity.	Monthly	Gathering anecdotes is a labor-intensive process and may require some creativity to obtain. Consider using the built-in MOSS survey capability.	Targets for success stories might be based on total “value” represented in the stories collected or the number of stories documented.

Your organization will most likely have a preferred format for documenting metrics. This might be a balanced scorecard, documented key performance indicators, or a simple “report card.” Your goal will be to ensure that you are capturing metrics that, as well as possible, directly relate MOSS’s value to the business. Keep in mind that you also want to be sure that you are not spending more time counting metrics than you are doing real work, so look for measures that are both meaningful and practical.

Take Action

Always measure your success with some well-defined metrics. Add these items to your MOSS project plan.

- Do not underestimate the importance of a metrics plan. Even if your solution is fully funded for the first release, you will likely need to be able to show meaningful business impact to get funding for "release 2 and beyond."
- Remember that business executives will respond most favorably to your metrics when you can combine both quantitative measures with "real-world" stories that describe how the solution added value to the business.
- Look to leverage key performance indicators that your organization already measures so that you can look at your solution's impact on the important indicators of success in your organization.

Governance

Any portal, of course, is only as good as the value of its underlying content. A strong governance framework is essential to ensure that a portal delivers worthwhile content to its users in an effective way. A governance framework is required to

- Avoid portal, team site, and content "sprawl" (unmanaged sites and content that is not periodically reviewed for accuracy and relevance) by defining a content and site review process.
- Ensure that content quality is maintained for the life of the portal by implementing content quality management policies.
- Consistently provide a high-quality user experience by ensuring that the governance plan is followed.
- Establish clear decision-making authority and escalation procedures so that policy violations are dealt with and conflicts are resolved on a timely basis.
- Ensure that the portal strategy is aligned with business objectives so that it continuously delivers business value.

A governance framework refers to the processes and roles that accomplish these governance goals. Some examples of the elements of a governance plan for a MOSS solution include the following:

- **Vision Statement.** A statement that describes, at a high level, what you want to achieve with MOSS. For example, "The company portal will be the primary means of accessing line-of-business (LOB) data within our organization."
- **Guiding Principles.** Organizational preferences supporting the vision. For example, "Corporate provides guidelines and optimal standards, but individual offices or departments may vary from the corporate guidelines if absolutely necessary from a business perspective."
- **Policies.** Specific policies reflecting decisions about rules and standards for MOSS. Examples of policies could relate to file names. For example, "File names should be topical and descriptive. Generally, file names should not include dates or versions." Policies may also relate to who has access authority to design pages and author content as well as provide standards for content metadata.
- **Procedures.** Instructions describing how to execute processes, including, for example, adding content, removing content, and adding metadata attributes to the corporate taxonomy.
- **Roles and Responsibilities.** Specific documentation describing how each employee as an individual or as someone with a particular role or as a member of a certain group is responsible for ensuring success of the MOSS solution.

Adoption of a new MOSS solution often involves a dramatic change in user behavior—specifically, greater integration of technology into day-to-day work and increased collaboration. In more traditional IT solution deployments, the solution business logic changes relatively infrequently. In a MOSS solution, both the back-end database and business logic change frequently and often significantly. Moreover, both the business market and technology are guaranteed to change during the lifetime of the MOSS solution. This implies that business stakeholders must be continuously engaged since MOSS's ability to meet user needs is critically dependent on areas such as data quality, content relevance and currency, and frequent updates, all of which are business user responsibilities. In addition, unmanaged MOSS implementations can suffer from unconstrained growth of team sites and content that is not managed or updated on a regular basis. Developing a clearly defined governance model for your MOSS solution is an absolute necessity to ensure a successful deployment.

In a MOSS deployment, there are several key roles to consider. These roles and a high-level description of responsibilities are outlined in the following sidebar. Note that in smaller organizations, many roles may be fulfilled by a single individual. However, it is still important to consider the needs of each perspective in order to be successful.

Take Action

Don't assume MOSS can be managed with your existing resources. Getting the right people in place is another important step in the process; be sure to consider the following.

- Use the list of MOSS 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 MOSS solution that might potentially be added to individual performance plans.

MOSS Solution Roles and Responsibilities

A number of roles are fairly standard with regard to portal and collaboration efforts. To be successful, you will likely need to identify the following roles in your organization.

- **Governance Board.** Serves as a governance body with ultimate responsibility for meeting the firm's goals with respect to the MOSS solution. This Board is typically composed of representatives of each of the major businesses represented in a company portal—for example, Human Resources, Finance and Accounting, Marketing, and Technology.
- **Executive Sponsor.** Provides executive-level sponsorship for the solution strategy. The primary responsibility of the Executive Sponsor is strategic, positioning the solution as a critical mechanism for achieving business value and helping to communicate the value of the solution to the management levels of the organization.
- **Business Owner.** Manages the overall design and functional integrity of the solution from a business perspective. This person is usually a representative from a business stakeholder but may be two people—one representing the business and one representing the technology department. The Business Owner does not have to be an IT expert, but his or her job function typically includes responsibility for internal communications, intranet portals, or external communications for external portals.

- **Central Administrator.** Manages the overall design and functionality integrity of MOSS from an IT perspective. Works in partnership with the Business Owner.
- **Site/Page Owner.** Serves as the centralized, primary role for ensuring that content for a particular page/site is properly collected, reviewed, published, and maintained over time. The Site or Page Owner is an expert in the content that is showcased on the site or page. The Site/Page Owner needs to learn about MOSS, but his primary expertise is business-focused.
- **User.** Uses MOSS to access and share information. Users with content contribution privileges also own and maintain the content they publish on it. Users can play the role of either Member (users with contribution permissions), Visitor (users with read permissions), or both, depending on the specific site in MOSS.
- **IT Department.** Ensures the technical integrity of the MOSS solution. Makes regular backups of MOSS and its content. This team also usually sets up and maintains the security model.

Documenting roles and responsibilities is one of the more critical aspects of the governance framework or plan for the MOSS solution. The governance plan is typically developed by the solution design team, which, as defined earlier, needs to include representatives from both the technology and business stakeholder communities. The framework needs to define who has the authority to mediate conflicting requirements and make overall branding and policy decisions. Some of the policy decisions that will frame your governance plan and form the basis of the specifics of your roles and responsibilities definition include the following:

- How much responsibility for page design will you delegate to page owners? Can users modify Web parts (Web-based data and UI components) on pages that they "own" in team sites? Can they modify Web parts on pages that are part of the corporate intranet publishing portal?
- Will some Web parts be "fixed" on the page, or will page owners be allowed to customize all of the content on their pages?
- Who is allowed to set up or request site-wide Content Types or Site Columns? How much central control do you want to have over the values in site columns? (Content Types and Site Columns allow you to specify elements in your taxonomy. These MOSS features are

discussed in detail in Chapter 5, "Planning Your Information Architecture.")

- Who has access to each page/site?
- Who is allowed or who will be responsible for setting up new team sites? If this responsibility is controlled by the IT Department, it is likely that IT will have to negotiate a service level agreement (SLA) for team site setup responsiveness with the business stakeholders. If this responsibility is delegated, users will need training to ensure that they follow acceptable conventions for naming, storage, and so on.
- If the governance model says that page and Site Owners need to be responsible for content management, will you be prepared to decommission pages where no one in the organization will step up to page ownership responsibilities?

The comprehensive governance framework should be documented prior to the launch of the solution. Communicating the substance of the governance plan will be a core component of launch planning. It is especially important to ensure that Page/Site Owners understand and commit to their content management responsibilities. Content management responsibilities should be included in the roles and responsibilities that are documented as part of the governance framework. However, because the portal is only as good as the content it contains, we have called out content management in a separate section of this chapter to ensure that this critical function gets the appropriate level of attention in your organization.

Content Management

A good content management plan addresses both the design of content as well as its ongoing maintenance. As you develop your content management plan and responsibilities, you need to keep both design and maintenance issues in mind at the same time, so we have intentionally combined these two activities in this discussion.

As general guiding principles, you want to be sure that the content in MOSS meets the following characteristics:

- **Usable.** The content organizational framework needs to match how users think about their work. Usability relates to both content design and maintenance.

- **Credible.** Content needs to be maintained—it must be reliable, timely, and accurate. Credibility is primarily a content maintenance issue, but as discussed in the section "Credibility and Relevance," content credibility is an important consideration in your content conversion plan and thus has an impact on content design.
- **Relevant.** Content must be relevant to the users' daily needs. Content relevance is an important part of both content design and maintenance.

Usability

Usability strategies ensure that the MOSS content continues to provide value to users over time. This section discusses three elements of usability as it relates to MOSS content:

- **Structure Your Content to Facilitate Search.** Your content management strategy needs to define MOSS content in a way that facilitates accurate search results.
- **Create a Logical and Organized Content Taxonomy.** Your content classification strategy needs to successfully support browsing and navigation.
- **Leverage Personalization Capabilities to Target Content.** Your content structure should support both targeting content to specific users and allowing users to personalize content based on their specific business needs.

Structure Your Content to Facilitate Search

The content in MOSS should be optimized for the effectiveness of the MOSS search engine, including both documents and external data sources:

- Monitor usage of MOSS over time to ensure that users find what they are looking for quickly, with the minimal number of steps and "clicks."
- Assign appropriate coordinator(s) to maintain lists of values for global Site Columns and Content Types to ensure search consistency.
- Ensure that users can find what they are looking for in their own terms. Leverage the thesaurus capability in MOSS to create substitution terms for commonly used word and phrase alternatives. For

example, ensure that the thesaurus includes common abbreviations that are unique to your organization and substitution terms such as *business process renewal = business process reengineering*. Assign responsibility for maintaining thesaurus information for the MOSS search infrastructure.

- Monitor site usage to ensure that you have created an intuitive structure by working with the different user communities to better understand how users access the content. Consider conducting user focus groups to ensure that you have an optimal design.

Create a Logical and Organized Content Taxonomy

A taxonomy is a collection of relevant topics and subtopics arranged in a hierarchical or networked structure. A library card catalog is a classic example of a taxonomy. In MOSS, the taxonomy is represented in the overall structure of the pages in the site, which provide a navigational taxonomy, as well as in site metadata—the Site Columns and Content Types (see Chapter 5). An effective taxonomy helps users navigate to documents in which they are interested without having to do a search (although in practice, users use a combination of taxonomy navigation and search when both are available). Taxonomies also allow users to see documents in a context, which helps them assess whether a document is relevant for what they are trying to accomplish.

As you design your MOSS solution, you will need to carefully review the initially proposed taxonomy with key users. Carefully analyze the need for "required" fields. Encourage users to provide descriptions if the purpose of the content is not clear from the other metadata (for example, for graphic files). Ensure that content contributors assign appropriate metadata to content as it is loaded into MOSS but that the burden of content classification is balanced with the need for finding documents once they are posted. You need to ensure that existing documents are searchable and review existing content to ensure that document metadata properties are assigned and valid. Assign content owners to test initial content prior to implementation across the enterprise.

Leverage Personalization Capabilities to Target Content

MOSS includes several important "out of the box" capabilities that have the potential to significantly improve usability for your users. These include the ability to target content to groups of users via Audiences (a group of users defined based on attributes in the user's profile), the ability for users to choose to be notified about content changes via alerts, and the customizable My Site feature that enables an individual user to personalize a private portal page. To optimize usability, your design should identify key Audience groups and incorporate audience targeting for documents, news, or items in lists. Your design plan should also ensure that users take advantage of My Site personalization capabilities. Your MOSS portal solution provides some significant usability advantages over a traditional intranet because of the ability to target and personalize content. Leveraging portal content personalization capabilities will help make your portal more valuable to users.

Credibility and Relevance

It is especially critical to keep content current over time to ensure that it stays relevant. Without good strategies for content management, your portal content can become stale, and users will begin to lose confidence in the information it contains. It is important that content owners understand their responsibility for ensuring that content is managed and maintained throughout the life of the portal.

New Portal Content

As you load content to the portal, you need to decide what content requires review and approval to guarantee credibility and accuracy. Because not all content requires the same degree of review and approval, establish guidelines for which types of content should be reviewed and approved and to what extent. The review requirements will be based on both the audience for the content and the type of content, which includes how the content will be used. For example, critical content that is actively relied upon and is broadcast widely (such as HR information and global policies) might require a high level of review before publishing to the portal. On the other hand, content that involves commentary, team discussions, or works in progress may require little, if any, review. Think about the following types of content as you determine how you will review content for accuracy and credibility prior to publishing. You will likely have different policies for different types of content:

- **"Published" Content.** Authoritative content managed by one or more "experts" and made available to a larger community. HR information or global policies are examples of published content.

- **Collaborative Content.** Nonauthoritative, "living" content that is part of a project or team and is managed, for the most part, in team sites. This content is managed and used by the same community. A working document for a project team—such as a draft project deliverable—is an example of collaborative content.
- **Records.** Historic content maintained for business continuity and regulatory reasons. This content generally cannot be changed once it has become a record and will have a defined lifetime specified as policy.
- **Reference.** Content that is used by the system or application, such as a lookup list of product categories or regional offices.

The degree of review for content will have a significant impact on the design of your MOSS environment. For example, a global organization established a design strategy that encourages users to use Document Workspaces to work collaboratively on the creation of content, effectively using the collaborative workspace as the content approval mechanism. Once the content and appropriate metadata classifications are agreed to in the Document Workspace, one of the collaborators is assigned the responsibility of publishing the content formally on the appropriate page of the portal, a process that can be automated. Thus, the strategy for creating and approving content can be much more than just a content maintenance decision.

An important content design consideration is ensuring that it is apparent to the user the degree to which the content has been reviewed and whether the document he or she is reviewing is in Final form, Draft, or Work in Progress. Designers can consider adding a "Status" Site Column to all document libraries with values of Final or Draft so that users will clearly know the intended use of the content. Solution designers can decide how Work in Progress will be shared in MOSS publishing sites or whether only Final documents (this could vary by department or project) will be shared. Many organizations determine that Work in Progress should only live in private team sites until it is ready to be shared more broadly. At that time, content is officially published to the portal.

Existing Portal Content

Sometimes the minute that content is loaded into a portal, it is already "old." MOSS has several "out of the box" features that help you ensure that your content is maintained over time. On sites built with the "Publishing" template, MOSS automatically adds two fields to the Document library:

Scheduling Start Date and Scheduling End Date. Scheduling Start Date offers two options: "immediately" (the default) and "on the following date," where the user must enter a date. Scheduling End Date offers two options as well: "never" (the default) and "on the following date," where the user must enter a date.

You can use the scheduling fields to create views and workflows to recertify content prior to the expiration date and "dispose" of content (by sending it to an archive or deleting it) if it is no longer relevant.

Take Action

Your portal will only be as good as the content it contains. Users must feel like they are getting value from the portal, or they won't use it. Make sure you consider the following.

- Conduct focus groups and usability tests. Identify representative users to provide feedback on ease of use and logical content positioning (that is, was it where you thought it would be?).
- Be sure that content management responsibilities are clearly articulated in the MOSS roles and responsibilities definitions discussed earlier in this chapter. Content is "king" in MOSS solutions. A portal or collaboration solution with outdated or irrelevant content will fail.

Rollout

Effectively defining a governance plan, including a content management strategy, and building and testing your MOSS solution is still only part of what you need to do to ensure the success of your solution. Even with a great governance plan, a complete collection of credible, usable, and relevant content, and a fully tested solution, you can't just "turn on" the new portal and collaboration environment and expect users to come running to embrace the new solution with open arms. Everyone in your organization is already busy listening to the same radio station—WIIFM, "What's In It for Me?" Your rollout plan needs to capture both the hearts and minds of the user community to ensure that the solution will be successful. The following areas should be incorporated in your rollout and launch plan. Note that these areas are not necessarily sequential—in fact, they pretty much all have to happen in parallel, which adds to the challenge of successfully rolling out your MOSS solution!

- **Communications.** Use new and existing vehicles such as corporate newsletters, "town hall" meetings, and breakroom posters to communicate to the user community about the MOSS solution. This provides a way to overcome cultural barriers and ensure that users receive the maximum value from the new solution.
- **Training.** Ensure that users, managers, and administrators know how to use MOSS effectively.
- **Launch and Content Conversion.** Define strategies for converting content for initial solution deployment and launch of the solution.
- **User Support.** Ensure that there is an ongoing plan to support all levels of MOSS users.
- **Incentives and Rewards.** Ensure that organizationally appropriate incentives are established for MOSS users and that contributing to and using the new solution is incorporated into daily work routines of everyone in the organization. This might include incorporating content management responsibilities into individual performance goals or publicly recognizing key content contributors or MOSS success stories.

Communications

The communications strategy should promote the awareness and value of the new MOSS solution. Your Communications Plan may include activities that begin during design, but the majority of activities will begin just before you are ready to launch the solution. Communications activities must also be an active part of maintaining user acceptance throughout the entire life of the solution. Thus, your plan needs to include not just communications when MOSS launches, but also ongoing activities that keep the portal and collaboration tools "top of mind" throughout their lifetimes. The communications strategy should address the following components and considerations:

- Leverage existing expertise and experts to help develop your Communications Plan. Work with your internal communications or marketing teams to develop both communications messages and materials. Consider what activities and messages have worked in the past, and think creatively about new ways of engaging users and portal contributors.

- Leverage existing newsletters and "town hall" or business unit meetings to deliver key messages about the portal, collaboration tools, and other productivity initiatives like a new version of Office. You can also demonstrate the solution "live."
- Draft a memorandum for the CEO or similar high-level executive to send when you are ready to launch MOSS. Active sponsorship by key business executives can go a long way towards getting users over initial reluctance to try the new solution.
- Tailor messages in communications plans for each target audience. For example, messages may be different for District personnel versus Home Office personnel because the value of the portal and/or collaboration tools and the business reasons for using it may be different. The same user will leverage MOSS for different reasons at different times, and the Communications Plan should address these different scenarios. For example, an attorney in a law firm plays the role of "employee" when she uses the company portal to update the beneficiary of her 401K plan. However, the attorney approaches the same portal as a business stakeholder with the role of attorney when she uses the portal to find last month's billing for her current client. Make sure that both the communications medium and the message are targeted to your audience and the roles they play in the organization, as well as when they use MOSS. In the attorney example, this might mean designing a communications message for all employees that reminds users that the company portal can be used for basic HR self-service. In addition, this could also mean designing a completely separate message targeted to just attorneys. It describes how Attorney Smith used the portal while on the phone with a client who was requesting additional work. The attorney quickly identified that this client was 60 days past due, and this timely information resulted in an immediate collection of the past-due amount. Work with key individuals within each business group to ensure messages and their vehicles will work for their locations and roles.
- Consider a fun activity—such as an Intranet Scavenger Hunt—to get users excited about the new solution. For example, one organization created a portal treasure hunt that provided participants with a list of 10 questions whose answers could be found by either searching or browsing for content within the MOSS environment. One question asked users to find the author of a specific document published to the portal. This answer was found by searching or

browsing for the document and then examining metadata properties to identify the author. Another asked users to find out what would be offered for lunch in the cafeteria on a date two weeks into the future. This answer was found by navigating to or searching for the cafeteria menu, which was published monthly, and looking in the document for the lunch item on that date. A third question asked users to identify whom to call for questions related to medical benefits. This answer could be found in several ways, including searching for the term "medical benefits." This turned up a Frequently Asked Question with the answer to this question, or navigating to the HR page and looking at the Key Contacts Web part for the medical benefits expert, whose name and contact information were prominently featured. Users who turned in correct answers for all 10 questions were entered into a drawing for a dinner for two at a local restaurant of their choice. The activity not only promoted the new portal, but it also walked the user through some valuable information-seeking activities for which the portal could provide quick and accurate results.

- Encourage influential executives to talk about MOSS. Better yet, use MOSS for information distribution instead of sending email.
- Eliminate any paper-based or email distribution for regular reports, targeted communications, and so on if they can be found on the MOSS solution. For example, you may want to consider eliminating paper-based newsletters if you can use the portal to create targeted news items or simply post the existing newsletter to the portal and allow users to print it only if they want a paper copy.
- Promote enthusiasm and eagerness by including high-value content and functionality in the first release. One important activity is to ensure that you have correctly identified a "killer application" and critical content for the first release of MOSS. Be sure that you are implementing at least one type of content or application that users really want and have not been able to get before—this is your "wow" factor or your killer application. For example, your MOSS portal might include a dashboard that integrates information from different applications to provide a comprehensive view of a customer or an account. It might even be as simple as a collection of links to all of the resources a new employee needs to quickly get up to speed in your organization. Identify valuable content or applications that users can only get on the portal to encourage users to try it, and design specific communications to promote their use.

- Manage user expectations about what MOSS is and isn't, emphasizing that it is a platform that is designed to evolve over time. Communications vehicles should emphasize and reiterate this point. Communications should focus on the objectives of this first release and ask users to provide feedback regarding metadata (Did we get it right?), satisfaction (Are users happy with the end-user experience, and can they find what they are looking for?), and training (Do we need more?). Make sure you have a Contact on each page so users know who is responsible for content.
- Remember that communications is an ongoing activity—you need to think about messaging beyond the initial launch, after the solution is operational. It will be difficult for your users to learn and appreciate all the features of MOSS in a single newsletter or training class. An ongoing communications effort provides additional opportunities to promote the features and functionality of MOSS as well as your specific implementation.

Training

MOSS is an intuitive product, but be careful not to underestimate the amount of training users will need. Training strategies help users gain hands-on familiarity with the new solution, which includes the business processes impacted by MOSS as well as the MOSS technology itself. Develop a training program for MOSS that carefully addresses the specific needs of each constituent community based on their roles in the organization and their roles in the context of the portal, collaboration tools, and other MOSS solutions. Training should be tailored toward how each group will now do their job using MOSS as a tool. To maximize the effectiveness of your training plan, you may want to consider training a few employees from each department or business unit in a "train the trainer" scenario and then asking them to train their peers. You may also want to identify some initial candidates to become "power users" of MOSS and consider providing additional, in-depth training for these individuals. Ideally, the "power users" should be distributed across the organization so that they can provide first-level support and ongoing training to members of their local departments, business units, or offices.

Training for MOSS is ideally scheduled immediately prior to the launch. Some users, particularly users who will be responsible for loading the initial portal content, will need to be trained (either formally or informally) prior to the start of content conversion. The majority of users, particularly those with read-only access, should be trained just before (or immediately after) the portal or MOSS solution is launched.

Each organization will have unique roles that may require specialized MOSS training. However, in general, there are three types of user roles for a MOSS solution. These roles are described using MOSS terminology for the permissions that users have on a given page or site. Visitors have "read-only" permissions to the specific page or site. Members generally have both "read" and "contribute" permissions. Owners typically have "design" permissions, which means that they can modify the structure, lists, libraries, and content metadata for the page in addition to being able to add content. The following list describes the basic training requirements for each MOSS role:

- **Visitors.** People who primarily read content usually need minimal training to get started. The focus should be on how the site is organized and how to browse and search for content. If your organization allows all users to create My Sites and custom views of portal content, Visitors will probably need additional training to learn how to best leverage these features. However, it is not necessary to train "readers" in all features of MOSS at the same time, especially if it means significant time away from work. You can definitely consider initial and follow-up training as a good strategy for users who primarily have Visitor access to pages and sites.
- **Members.** Users with content contribution privileges will need the same training as all Visitors. They also need additional training for the specific areas where they will be posting content so that they understand not just the mechanics of content posting, but also the strategy for metadata. MOSS Members who are not also Site Owners need to focus on loading documents (one and multiple) and applying metadata. They need to understand the importance of applying metadata to ensure site usability and the importance of keeping content current to ensure that the site continues to add value. A page or site must have at least one user with content contribution privileges, but sites may have any number of people with these privileges. In many organizations, all users of private team sites are assigned Member privileges, but only a small number of users are designated as Members for "publishing" pages such as the HR pages or pages owned by Finance and Accounting.

- **Owners.** Site Owners need all of the training that Members and Visitors need plus additional "design" training for MOSS. This user group should probably participate in formal MOSS training offered by Microsoft or a certified training partner. They need to understand not just how the site is organized, but also how MOSS works. Site Owners are typically business stakeholders who have overall ownership responsibilities for the content on the pages and sites they "own." Because the business owner of a page may not have the time or interest to learn the MOSS technology, the business owner may delegate the Site Owner responsibility (and user privileges) to a specific individual in his or her organization.

In general, it is recommended that you don't try to train all users in all features at one time. Consider introducing more advanced MOSS functionality over time (for example, the ability to target content via audiences, the ability to set up document and meeting workspaces, and the ability to set up and personalize a My Site) so as not to overwhelm users with too much information. Consider targeted groups, however, for more advanced functionality. One organization ran MOSS "lunch and learn" sessions on a weekly basis for the first several months after its MOSS solution was launched. Each week, the solution developers planned to discuss a different topic, but they left the last part of the session open for topics raised by participants. The meetings were conducted over Live Meeting so that remote users could participate.

Launch and Content Conversion

The rollout strategy for your MOSS solution needs to define an approach for converting existing content and launching the new solution. The approach for content conversion will be directly tied to your launch strategy (for example, you will only need to convert content for areas of the portal that you are launching), so we discuss these two strategies together.

Launch Options

You will hopefully have several options to consider when launching your MOSS solution. To minimize risk, many organizations consider "segmenting" both users and content for the first "wave" of launch.

In general, the optimal build and launch strategy for MOSS deployments involves a rapid development approach with multiple releases.

Essentially, the approach recommends leveraging as much “out of the box” functionality as possible in the first release or launch and focusing the deployment effort on getting meaningful content in front of users as quickly as possible so that you can use MOSS itself to “design the future.” This strategy assumes multiple releases based on business priorities for functionality.

You may want to consider additional variations for launching MOSS to facilitate content migration and user adoption. For example, you may want to contemplate launching the home page, an executive dashboard, and one “collection” of content, such as Human Resources content, for the entire organization in the first release or pilot. Or you may also want to consider launching the entire MOSS solution in a pilot but only for one region or office so that you can work the bugs out of business processes for content management before launching it to the entire organization. This makes sense if your geographies operate relatively independently and if there is content that is unique to a particular geography. For example, one global financial institution chose to launch its intranet portal in the United States first, followed by launches in Canada and Europe. This strategy significantly simplified the content conversion, training, and launch processes, because the development team could focus on one region at a time. Since the existing intranets from which they were converting were completely independent, the strategy made even more sense, because there were no issues related to maintaining parallel intranet environments.

Carefully consider issues such as whether it is possible to maintain both your current and new solutions at the same time, how long users will be willing to maintain two systems, and whether there is a firm fixed deadline for migrating from your current solution as you plan your launch strategy.

Content Conversion Options

Encourage users to begin the process of evaluating the value of existing intranet content as soon as you begin your design. Use the rollout of your new solution as an opportunity to “clean up” existing content. It’s a lot of work, but users typically have a much lower learning curve to overcome for the new solution if the content is clearly “better than what we had,” which typically implies content cleanup before content migration. If you have an existing intranet or extranet that will be incorporated into your MOSS solution, part of your design will need to include a determination of whether content will be left “in place” or migrated to the new portal. Business owners of content on the existing platform should be assigned the responsibility to clean up (and often migrate) their existing content. (The process of manually converting content to the new portal is an excellent way to ensure that users learn how to use MOSS.) As an example, one global organization planning a conversion of its existing intranet to MOSS 2007 identified that the average age of content on the current site is 2.5 years old, and a great deal of the existing content is no longer valid. This is not unusual, because many organizations did not consider content management part of the design of their intranets when they were developed, leading to stale content and frustrated users. You can use the launch of the new solution as a good opportunity to “force” content owners to invest the time to review their existing intranet content to consider whether it should be archived or deleted prior to the launch of the new solution. Many portal development teams adopt a “no automated content migration” strategy. If all content has to be uploaded manually to the new solution, users have a strong incentive to migrate only content that is still valid and useful.

There are several alternative content migration strategies that are not necessarily mutually exclusive. Use the following list (which is not exhaustive) to think about content conversion alternatives that best meet the needs of your organization.

- **Option 1.** Clean up all existing content, and migrate all of it to the new solution. This strategy is most appropriate when the majority of existing content is current and relevant or where the existing platform will no longer be supported.
- **Option 2.** Migrate none of the existing content into the new solution. Use MOSS to index existing file shares, but close the file shares for new content. In other words, all new content will be managed by MOSS, but searching “old” content will leverage only the full text search capability within MOSS. This strategy is most relevant when the majority of existing content is used for reference purposes only.
- **Option 3.** Clean and migrate recent content only. For example, migrate content accessed within the past 6 months only. Leave the remaining content in the existing file shares or intranet, and close the file shares or existing intranet for write access, as in Option 2. This strategy is most relevant where there is a mix of both relevant and old content in the existing file repositories and where it will be possible to maintain the old intranet essentially as a reference database when the new solution launches.

The biggest effort in content conversion and migration is usually "metatagging" existing content. There are two components to the effort: identifying the value for the metadata (which requires knowledge of the content) and entering/attaching the tagged data values to each document. Some third-party automated tools can help with this process when there are large numbers of files to migrate. However, since knowledge of the content is so critical, it may also be appropriate to have a "divide and conquer" approach—dividing metadata tagging responsibility among knowledgeable content owners. Some organizations use temporary help or offshore resources to assign metadata in MOSS if knowledgeable content owners can identify the metadata in advance.

User Support

There are several key elements of your ongoing strategies for providing users with the support that they need to ensure that the portal continuously delivers business value:

- Make sure there is a contact person identified for every page and site and that users can easily find out who that is. You can use the "out of the box" Contact Details Web part to display the name (and link to the profile) of the Contact for the page or site. The page Contact should be the person who can provide support to users about the specific content on the page.
- Consider getting Site Owners together on a weekly basis for the first few weeks (or months) after MOSS is launched so that they can compare feedback and support each other. Better yet, create a collaborative team site for all Site Owners to share and exchange ideas on an ongoing basis. Even though many of the pages are independent, a good idea from one user group may also be relevant for another. In addition, any major changes to taxonomy or page layout can be reviewed and discussed by the whole group before they are brought to the Governance Board for final approval.
- Make sure that your existing IT Help Desk is prepared to support MOSS. Help Desk personnel may be assigned special permissions for MOSS—permissions that cross the "out of the box" roles of Visitor, Member, and Owner. Help desk personnel have unique needs. They will likely provide the first tier of support for MOSS users, but they may also be the least familiar with the MOSS content due to their systems-focused role in the organization. If Help Desk personnel are expected to support Site Owners, they need to

have the same type of MOSS design training that Site Owners need so that they can support users with design privileges. In addition, they need custom training about your specific MOSS implementation to become thoroughly familiar with the end-user experience for users with Visitor and Member permissions. Help Desk personnel should understand how the site is organized and where content can be found, and be given a list of common tasks that developers think users will execute on MOSS. It is useful to have the development team "back up" the Help Desk on site for the first couple weeks after the initial MOSS launch.

- Finally, be sure to provide mechanisms and processes for incorporating end-user feedback so that you can provide ongoing support for end users by improving the design of your MOSS environment and its content and functionality. You will want to learn about portal, search, and team site usage; content value; content relevance; content organization; new components; and new integration needed. Consider conducting periodic end-user surveys to specifically solicit end-user feedback, but also engage in a continuous dialog with Page Contacts to gather feedback from the users they support.

Incentives and Rewards

Incentives and rewards are effective tools for getting people to try MOSS and apply it to their day-to-day work. The concepts and decentralization of content management responsibility with a MOSS solution are likely to be different from your organization's current intranet implementation. Moreover, users may need to be encouraged to use the MOSS rollout as an opportunity to clean up their existing content.

Create appropriate incentives and rewards to encourage collaboration and use of MOSS and other productivity tools. Consider team-based rather than individual rewards to encourage sharing. Also consider recognizing users for both knowledge creation and reuse. It is important to reward not only the inventor of an idea or the contributor of a document but also the "reuser."

Champion knowledge-sharing behavior as well as MOSS usage to facilitate culture change. Create specific programs and communications messages to focus on "how we work, how we share, and how we integrate." Consider incentives for using MOSS in ways that add value for other users—for example, think about incentives for posting a best practice or lessons learned. Encourage office and department managers to ask their staff to check the company portal or group's team site when they need information.

Recognition often lies in being perceived as an expert by peers and management. Ensure that the author's name is attached to documents, guidelines, best practices, and presentations he or she creates. This can be exploited with presence recognition technology—I find an asset and see that the author is online, so I can either IM him or initiate a phone call.

Using MOSS has to be *self-rewarding*. Users have to get something out of it—understand the "What's in it for me?" question—or they will not engage. Rewards and recognition may be healthy in the early stages of building enthusiasm, but in the long run, people need to find *the work itself* rewarding. Initially, it may work to develop a "fun" incentive to get people to try your collaborative toolset.

Create recognition for transferring and using best practices. You can do this by celebrating best-practice success stories in existing corporate communications vehicles. Recognize both parties and units involved in the transfer of knowledge. At any given time, someone is both contributing and receiving knowledge. If both sides of the transaction are not rewarded, you will run out of content quickly. Formal rewards may not work in your culture; be careful about using specific rewards for people motivated primarily by a sense of involvement and contribution. Reach out to your Human Resources department to help develop and document incentives and rewards that are appropriate for your organization and culture. Use the new solution as an opportunity to be creative; try not to get hung up on what has worked in the past. This is new technology with an enormous amount of personalization capability. Take advantage of the inherent value of the MOSS technology to look for new and exciting ways to encourage and reward use.

NOTE Before deploying MOSS 2007, be sure to download the free book available from Microsoft called *Deployment for Office SharePoint Server 2007*. The book provides information and guidelines to lead a team through the steps of deploying a solution based on Microsoft Office SharePoint Server 2007. The audiences for this book are business application specialists, line-of-business specialists, information architects, IT generalists, program managers, and infrastructure specialists who are deploying a solution based on Office SharePoint Server 2007. You can get the book at http://go.microsoft.com/fwlink/?LinkId=79589&clcid=0x409.

Key Points

- Portal and collaboration software can be expensive to purchase and integrate. If you want to build a successful solution, you need a carefully defined strategy.
- Ensure that the MOSS rollout has a clear connection to business goals and objectives.
- Develop a method to identify and quantify pragmatic, tangible benefits for the MOSS solution.
- Establish a governance framework to ensure quality and relevance of content and to ensure that all users understand their roles and responsibilities.
- Make sure that you have a Governance Board with a strong advocate in the role of Executive Sponsor.
- Keep your governance model simple. Portals need a strong governance model, but they don't need complicated models with lots of bureaucracy.
- Don't make the solution itself more complicated than it needs to be. Be careful about "overdesigning." Just because MOSS has a cool feature doesn't mean that you need to deploy it—at least not right away.
- Keep in touch with your users. Make sure you have a plan for collecting feedback on an ongoing basis.
- Just because the intranet exists, it doesn't mean that everything should be on it. Carefully assess what should be on the intranet portal and what shouldn't.