



# THANKS FOR ATTENDING...

We would like to take this opportunity to **thank** our **Sponsors**



# TOP TIPS FOR SHAREPOINT SUCCESS

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What I learned from trying to put square pegs in round holes.

# INTRODUCTION


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-

# BLOG – WHATSTHESHAREPOINT.COM

What's The (Share)Point?  
Another resource for MS SharePoint information.

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## I'm speaking at SharePoint Saturday – Twin Cities on Oct 29, 2011

By David Petersen, September 20, 2011 10:59 am [Comments \(0\)](#)

I just found out I'll be presenting my Mashup presentation at **SharePoint Saturday – Twin Cities on October 29!** Come see me and hopefully I'll have some books with to sign!

Uncategorized | conference, Presentations, sharepoint saturday, Site Map Edit


## Org Chart/ Site Map Mashup: Wrapping it all up!

By David Petersen, August 30, 2011 11:57 am [Comments \(0\)](#)

I have received some positive feedback on this article series. Thank you! I thought I'd go ahead and create this post with links to each post in the series to make it easy to read the whole thing in order. I also want to thank [EndUserSharePoint.com](#) for picking up the series, making it available to many more people. As always, if there is a particular subject you would like to know more about, send me an email and I'll try to write something about it.


Here are all of the links!

1. Introduction




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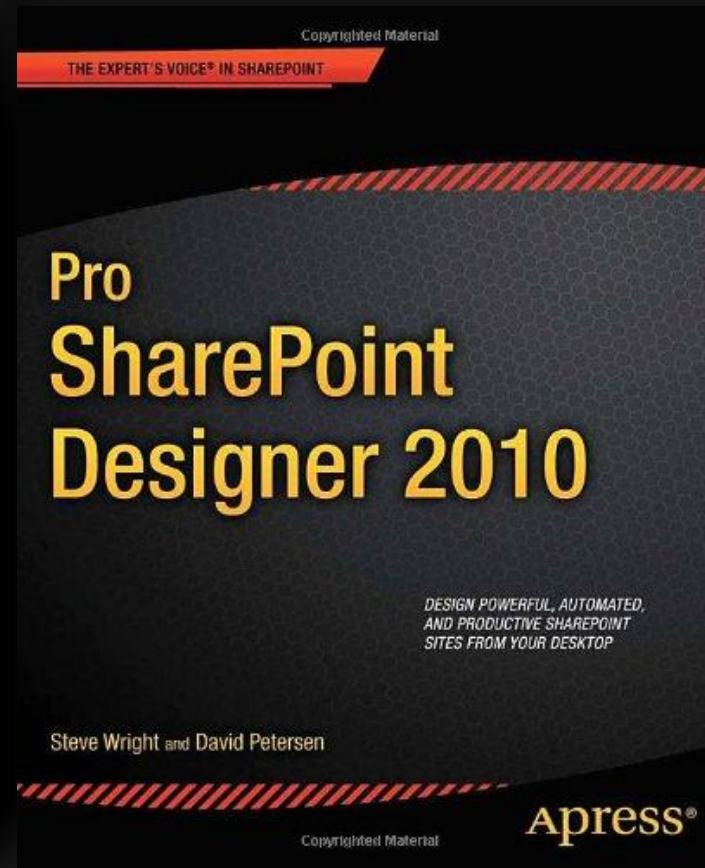


*Contact Me*



**David Petersen** MCSD, MCTS

# PRO SHAREPOINT DESIGNER 2010



What have been some of your struggles with SharePoint implementations?



# WHAT IS SHAREPOINT SUCCESS

- User Acceptance
  - Becomes a tool that people use.
  - The technology becomes invisible.
-

# TIPS FOR SHAREPOINT SUCCESS





# HOW MANY HAVE HEARD THE FOLLOWING?

We don't need to plan, we need to just get on with it! 'IT' being implementing SharePoint to address [current problem] or as the platform to replace [current broken application] and fix all of the company's ills. After all, it's just a matter of installing the software, entering your license key, doing a bit of configuration and you're set. How hard can it be?

# ALWAYS REMEMBER THE 6 P'S

- Proper Planning Prevents Piss Poor Performance
  - This is your SharePoint. Make sure you are implementing SharePoint based on YOUR needs and not some template that someone suggests.
  - What are the real areas of pain?
  - How? Gather requirements, wireframe.
  - Caution: Don't over-plan.
-

# PRACTICE GOOD I.A.

- What to think about when planning SharePoint.
  - Mandatory
    - How to allocate Applications, Site Collections and Sites
    - Global Navigation
    - Local Navigation
    - Search
    - Security Model
  - Optional (but important)
    - Sites (what templates, features etc.)
    - Other navigation
    - Managed Metadata
    - Content Types and Properties

# CONTINUED...

- Optional (but important)
    - Sites (what templates, features etc.)
    - Managed Metadata
    - Content Types
    - Site/Page Templates
  - Optional Features
    - Any additional navigation
    - Managed Metadata
    - Content Organizer and Drop-Off Library
-

# KNOW WHAT YOU ARE GOING TO BUILD

- Don't over-promise. Get rid of the marketing hype.
- Assumptions can kill scope.
- Agree and document what is in scope and what is out of scope. Then stick to it!
- Don't go overboard in restricting.
  - Make the solution unappealing or too confusing
  - Introduce hidden costs by disabling/deactivating/hiding core features.
  - Lock yourself into a design (logical or physical) that won't work in the future.
- Always think BIG PICTURE! SharePoint is meant to be flexible. It will change.

# ACCEPT SHAREPOINT'S LIMITATIONS

- It's not the BEST solution for ANY organization in ANY scenario.
- It can be expensive. Very expensive.
- It contains far more than most organizations will ever use.
- Ask – What is the best solution to my problem?
- Learn as much about the SharePoint platform so you can make intelligent decisions.

# CONTINUED...

- Resist the urge to customize SharePoint heavily.
  - SharePoint UX is supposed to be a task-based UX. Don't try to make it different.
  - Very High Total Cost of Ownership (TCO) over the long term.
  - Compromising updates. Service Packs can break heavily customized sites.
- Follow Microsoft guidance on development
  - <http://msdn.microsoft.com/en-us/sharepoint/ff660756>
- Beware of third party connectors. Usually poorly developed and could potentially be a source of performance issues.

# MAXIMIZE SHAREPOINT'S STRENGTHS

- By concentrating on SharePoint's strengths, success comes quickly!
  - Understand the "Power of the List"
    - Once you teach users to think about how they can exploit lists for their own use, quick Wins will come.
    - List Views! - No folders!
  - Understand the Calculated Column!
  - Process automation / Workflows
    - More powerful in SharePoint 2010
    - Built-in like document routing to a manager.
    - Approvals
    - Can extend using SharePoint Designer 2010 and Visual Studio 2010
-



# LIVE IN THE SWEET SPOT

- I maintain: 80% of all requirements can be fulfilled by out of the box components or with SharePoint Designer 2010.
- Examples:
  - Enterprise Acronyms & Glossary
  - Frequently Asked Questions
  - Preferred Suppliers
  - Staff/Office phone list
  - Online form
    - Suggestions
    - RSVP
    - Polls

# TIP #5 – CONTINUED...

- Examples continued...
  - Catalogs (software/applications/books/media)
  - With workflows
    - Financial Approvals
    - Performance Appraisals
  - Provisioning new SharePoint sites.
    - Laura Rogers (@WonderLaura) has an example  
<http://sharepoint911.com/blogs/laura/Lists/Posts/Post.aspx?ID=126>
- Learn what is possible so you can build that GREAT solution that will help your business understand the promise of their SharePoint investment.

# TIP #6 – DON'T EXPECT MIRACLES

- It's software – it's not perfect.
- It's not a silver bullet.
- Don't transfer your existing problem from one platform to another.
  - FAIL = Copy files from network drive to SharePoint.
  - FAIL = Use folders in a document library as a file system.
- Don't go insane! Don't do the same things over and over and expect different results.

# IDENTIFY YOUR ROCK STARS

- SharePoint is meant to be user-centric. It's "social" software.
- SharePoint roles are not all technical roles, include some business roles also.

# IDENTIFY YOUR ROCK STARS

- Common Roles
    - Project Managers
    - Solution Architect
    - Business Architect / SharePoint SME
    - Information Architect / Usability Specialist
    - Change Manager
    - Infrastructure Manager
    - Systems Administration
    - Content/Migration Manager
    - Developer
    - QA/Test Manager
    - Branding Specialist
-

# PARTNER WITH A PROFESSIONAL

- If you don't have in-house experience with SharePoint, find a qualified professional services company that has implemented SharePoint in multiple companies of various sizes and verticals.
    - Learn from their mistakes
    - Learn from their exposure to many different environments.
    - Look for partners with a track record of SUCCESSFUL deployments.
    - Willing to transfer knowledge.
    - Excellent documentation skills. Ask to see some examples of their documentation.
    - Be willing to learn!
-

# DON'T BITE OFF MORE THAN YOU CAN CHEW

- Start small
- Identify quick Wins to help drive user adoption.
- Under promise – over deliver!

# SPREAD THE LOVE

- Join a user group.
  - Start a local company user group.
  - Attend conferences.
  - Local lunch-n-learns.
-



# REVIEW

1. Plan
  2. Use good Information Architecture
  3. Scope properly
  4. Accept SharePoint's limitations
  5. Maximize SharePoint's strengths
  6. Live in the sweet spot
  7. Don't expect miracles
  8. Identify your rock stars
  9. Partner with a professional
  10. Don't bite off more than you can chew
  11. Spread the Love!
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# MORE INFORMATION

- Slides
  - <http://whatsthesharepoint.com/presentation-notes/>
- Amazon Search for: Pro SharePoint Designer 2010
- Twitter: @dipetersen
- <http://www.linkedin.com/in/dpetersen>