

How to Overcome Slow User Adoption of SharePoint

A guide to understanding the importance of providing opportunities for end users to learn about SharePoint

Kim Lund
October 1, 2009



MINDSHARP™

EDUCATORS IN TECHNOLOGY



© Copyright 2009, English, Bleeker & Associates, Inc., DBA Mindsharp (www.mindsharp.com)

This paper and its contents is copyrighted and owned by English, Bleeker & Associates, Inc. and is intended for the private use of those to whom it is given by English, Bleeker & Associates, Inc. No part of the paper may be reproduced in any format by any method without the express written consent of English, Bleeker & Associates, Inc. This paper may not be distributed or redistributed in any form without the express written consent of English, Bleeker & Associates, Inc.

English, Bleeker & Associates, Inc. makes no guarantees or warranties, express or implied, about the contents and/or distribution of this paper. English, Bleeker & Associates, Inc. is not responsible for any adverse or unwanted effects or results that might arise from using the contents or advice of this paper and we reserve the right to change the contents of this paper at any time without notice. The information in this paper is provided "AS IS."

Mindsharp® is a registered trademark of English, Bleeker & Associates, Inc. in the United States.

Microsoft®, SharePoint®, Office®, and Windows® are registered trademarks of the Microsoft Corporation in the United States and in other countries.

Nothing in this paper should be construed as legal advice in any way nor should the contents of this paper be relied upon to replace legal advice from a licensed, practicing attorney.

Mindsharp does not warrant the contents of this paper. Information in this paper and the contents of this paper are subject to change without notice.

Table of Contents

Introduction	4
Pain Point 1: Employees Unaware of Powerful SharePoint Features.....	4
Pain Point 2: SharePoint Deployed Without Governance	4
Pain Point 3: User Community Not Involved in Planning SharePoint Site Use.....	4
Pain Point 4: End Users Expected to Create or Manage SharePoint Sites	5
Pain Point 5: Inefficient Use of Document Management Features	5
Pain Point 6: Uncertainty that Confidential Information is Secure.....	6
Pain Point 7: Added Training Needs Burden Staff	6
Pain Point 8: SharePoint Training Not Based on End User Needs.....	6
Pain Point 9: Help Desk Unable to Answer SharePoint Questions.....	6
Pain Point 10: Change in Organizational Culture Required for SharePoint to Be Accepted	7
How to Overcome These Pain Points.....	7
First - Get Help!	8
Summary	10
About the Author:.....	10

Introduction

Every new technology that enters the workplace comes with the expectation that it will revolutionize the way you do business. At a minimum, we expect that a new technology will provide value that will help the bottom line. If it did not, why would anyone invest the money to add it to his or her workplace? However, keep in mind that the benefits of technology are truly theoretical up until the day end users are effectively working with the technology every day. This really affects me as an educator. It not only validates the importance of my work, but it also provides an incentive for me to produce ways to educate employees better. Organizations that invest in new technologies know that the technology needs to be used appropriately in order to receive an adequate ROI.

Depending on who you are in your organization, you may either LOVE SharePoint or HATE it. Microsoft makes many promises when promoting what SharePoint will deliver. However, have those promises become a reality in your organization? The answer may be the key to why your colleagues, employees, and end users use SharePoint or create work-arounds to avoid taking the time to understand it.

If you find that user adoption of SharePoint is avoided or slower than anticipated in your working environment, you are not alone. For this reason, I have taken time to gather a list of top reasons user adoption of SharePoint is slow. In this paper, I will discuss the pain points corporations face with any SharePoint roll out.

If you plan to roll out SharePoint soon - congratulations! The fact that you are reading this paper indicates you understand that the changes SharePoint brings to an organization are significant enough to warrant a plan for how the roll out will affect your user population.

Pain Point 1: Employees Unaware of Powerful SharePoint Features

Employees are not aware of all that SharePoint can deliver for them, which leads to inconsistent use, not leveraging powerful new features, and low motivation to take time to learn the advantages it delivers. Most companies do not adequately communicate the scope, purpose, and impact of new technologies to their employees prior to implementation.

Pain Point 2: SharePoint Deployed Without Governance

When SharePoint has been deployed without governance, there is not a consistent use of product features and benefits because companywide standards for expected use were not communicated and consistent training for users is not available. The result is inefficiency, poor utilization, confusion, frustration, site misuse, and abandonment among end users. Furthermore, many organizations deploy SharePoint at the work group or departmental level, which causes SharePoint to become a grassroots effort. When use of SharePoint grows department by department or business unit by business unit, users cannot rely on consistent use throughout the organization since some colleagues may not have access or understand how to use SharePoint.

Pain Point 3: User Community Not Involved in Planning SharePoint Site Use

People support what they help create. For this reason, the user community is more hesitant to adopt SharePoint if they were not included in planning the SharePoint site strategy. When IT staff dictates what site usage should be or controls site topology

instead of getting the business users' input, the use and understanding of the functionality will be slow to take hold.

Pain Point 4: End Users Expected to Create or Manage SharePoint Sites

This pain point may sound like it is nearly the opposite of Pain Point 3, which encourages organizations to include the user community in the planning phase. However, when this same group is asked to create or manage their own SharePoint sites, they are often overwhelmed at the number of tasks they must perform to get the site ready for use. In addition, they may not be able to accomplish all of these tasks because of the learning curve required to understand tasks. For example, end users need the proper training to understand how to customize the site, create the appropriate content lists, and secure the site appropriately. The result is that the sites created by the user community will not meet their needs and frustration ensues.

Pain Point 5: Inefficient Use of Document Management Features

When the lifecycle of a document is not properly managed or understood, inefficiencies can be introduced that waste employee time, increase organizational costs, and duplicate efforts. The document lifecycle includes, but is not limited to, the following:

- Creating documents
- Locating documents
- Filing document in the proper location
- Distribution and retrieval of documents
- Securing documents
- Workflow for:
 - Approval policy
 - Retention policy
 - Archival policy

Users may not understand the power that SharePoint has to provide better efficiencies in document collaboration, storage, and findability. If users do not learn about these features, they will continue to use poor practices that have crept into the workplace as the digital era exploded. One study reported in *Microsoft Office SharePoint Server 2007 Best Practices* (Curry, B., & English, B. Microsoft Press, ISBN 0735625387, 2008) states that over 30 billion original documents are used each year in the United States that produce the following results:

- Cost of documents to corporations \approx 15% of annual revenue
- 85 percent of documents are never retrieved
- 50 percent of documents are duplicates
- 60 percent of documents are obsolete
- For every \$1 that a company spends to create a final document, \$10 is spent to manage the document creation process

Consider a modest estimate of workers wasting at least 10 minutes each day looking for documents; this would result in the following estimated costs for an organization:

- \$15/hour employee wasting 10 mins/workday x 200 workdays = \$500 lost each year per employee
- \$50/hour executive wasting 10 mins/workday x 200 workdays = \$1667 lost each year per executive

In order to realize fully the advantages SharePoint provides that can reduce these numbers; end users need to understand how to use SharePoint's document lifecycle features effectively.

Pain Point 6: Uncertainty that Confidential Information is Secure

End users put confidential information at risk in a SharePoint environment when they do not understand how to manage SharePoint site security. An industry research survey published by AIIM titled "AIIM State of the Market: Microsoft SharePoint" (AIIM, <http://www.aiim.org/Research/State-of-the-Market-Microsoft-SharePoint.aspx>, March 2008) reports that 40 percent of organizations that stopped using SharePoint said it was because of security or control issues.

If management and users alike are not confident, that content will be safe and retrieved by only those the documents were meant for, use of the technology will be minimal at best. When users do not know how to assure proper security and access, use of the technology is likely to decrease as users adopt work-arounds when they are unsure about proper use.

Pain Point 7: Added Training Needs Burden Staff

Many companies require non-technical staff such as training managers and human resource employees to make decisions about training needs for productivity tools such as SharePoint. However, SharePoint is a complex enterprise technology that has a depth of functionality that few non-technical staff understands fully. In addition, non-technical employees do not comprehend the scope of change SharePoint brings to an organization and how this change will affect the day-to-day jobs of end users. It is also difficult for nontechnical employees to evaluate the amount of additional work a SharePoint implementation will place on those responsible for training.

Other problems can arise if your company requires its technical IT staff to perform the SharePoint training. For example, the IT staff may find that as technologists, SharePoint training is not their strength or they may not fully understand the needs of business users. These problems can make it difficult for the IT staff to communicate how to use SharePoint at the appropriate end-user level or make the content relevant to their jobs.

Pain Point 8: SharePoint Training Not Based on End User Needs

Low retention of training concepts can occur when a one-size-fits-all training approach is used. SharePoint is a complex environment that affects every end user in various ways based on their role and job function. For this reason, it is critical that end users master the specific SharePoint functionality and tools they need to complete the tasks required for their job or role in the organization. It is equally critical that users have access to additional training when they need to learn additional functionality if their job changes.

If a one-size-fits-all training approach is used, users will not master the skills needed to complete their job more efficiently. The result is that users will be frustrated when they do not know how to use SharePoint or get the help required.

Pain Point 9: Help Desk Unable to Answer SharePoint Questions

SharePoint is fundamentally more challenging to the Help Desk than other productivity tools. Since SharePoint is a major paradigm shift for most organizations,

Help Desks can feel overwhelmed if they are not able to answer the variety of questions. This can occur because either the Help Desk staff does not have the expertise needed to answer questions, or they do not have time to deal with the number of users seeking answers.

Pain Point 10: Change in Organizational Culture Required for SharePoint to Be Accepted

Adoption of SharePoint can be slow because the culture in your organization has not achieved the changes required to leverage all SharePoint components. For example, most people in your organization are comfortable e-mailing documents to colleagues. However, this can be problematic for several reasons such as:

- Managing versions of documents stored in e-mail
- Storage space increasing in an e-mail system
- Lack of centralized access to the document
- Loss of files if an employee leaves the company and documents are not retrieved from their e-mail

When the document is stored in a SharePoint library, you can simply e-mail the link to its location instead of e-mailing the document. Even though this is not hard, it requires a change in the culture of how people work in your organization. Even if a handful of people do not embrace this new method of document distribution, you will experience lower user adoption.

How to Overcome These Pain Points

The key to increasing end user adoption of SharePoint and achieving better buy-in from users at large is to develop a plan that includes:

- Governance planning that includes:
 - Key members from various business units - not just IT
 - Focus on the vision and long-range goals
 - Ability to adapt to changes in requirements
 - Relevancy to needs of the organization
- Taxonomy planning that includes:
 - Governance team that will own and manage the taxonomy
 - Classification of information according to categories
 - Focus on the business, not on SharePoint
- Communication plan that includes distributing information to users about:
 - What SharePoint is
 - Governance and taxonomies for use in SharePoint
 - Building excitement for what SharePoint will be able to do in their environment
 - How it fits into the existing ecosystem of technologies
 - What it might be replacing
- A training plan that provides succinct training that:
 - Focuses on the needs of individual users
 - Available when needed
 - Holds users accountable
 - Teaches the technical "how-to" about SharePoint
 - Shares the reasons and best practices for using SharePoint
 - Incentivizes employees
 - Provides key competency certifications that encourage and build confidence when key concepts are mastered

If any of these important steps are missing in a SharePoint adoption plan, you will find that the effectiveness of the other steps will be less. For example, if you have not provided governance and have a poor taxonomy plan, use of SharePoint will be inconsistent. When this occurs, even if users receive useful training, there will be confusion about the proper use of SharePoint features. Even if governance and taxonomy planning has been completed but this information is not communicated to employees, there will still be confusion and inconsistency with the use of SharePoint. Lastly, if you have planned for proper governance and taxonomy, communicated to your employees that SharePoint is coming, but then fail to train employees, end users will not know how to utilize the new features provided by SharePoint.

For this reason, in order to receive the anticipated return on investment (ROI) of a SharePoint deployment, the key for success in usability and user adoption is tied closely to implementing a plan that includes governance and taxonomy, communication to employees, and relevant training.

First - Get Help!

If you think the suggestions included in the previous section are a tall order, you are right. You are probably not staffed to handle all of the steps that are recommended and you likely do not have the SharePoint expertise in-house to accomplish this plan. Mindsharp has the expertise, services, and products to help you implement all four key areas mentioned above. The biggest struggle for any company is a well thought out, effective training plan that meets the needs of the end user population.

That is why we developed *UserVersity* to deliver an end-to-end turnkey SharePoint communication and training program. We work with your staff to compliment the talent you have in-house, and then provide expertise in areas you may not have. UserVersity provides communication tools and a variety of training tools including:

- Adoption Manager
- E-learning
- Online or in person instructor-led training
- Quizzes
- Certifications
- Incentives and motivation for employees you would like to target

We are excited to be the first to offer such a flexible solution that encompasses all of your needs and provides a customized approach to training.

The following chart summarizes how Mindsharp and UserVersity can assist organizations when dealing with one or many of the pain points highlighted in this paper.

Pain Point	How Mindsharp Can Help
Pain Point 1: Employees Unaware of Powerful SharePoint Features	Mindsharp's UserVersity provides a communication plan that informs users about the key SharePoint features. Our communication plan includes e-mail templates, posters, and additional resources as requested.
Pain Point 2: SharePoint Deployed Without Governance	Mindsharp has SharePoint experts that can guide your governance and taxonomy planning or provide you with resources to assist your team in planning these important components.
Pain Point 3: User Community Not Involved in	Mindsharp can help obtain feedback about who should be part of the team that develops your SharePoint governance and

Planning SharePoint Site Use	taxonomy plans.
Pain Point 4: End Users Expected to Create or Manage SharePoint Sites	Mindsharp's UserVersity includes training in various formats that provides end users with the information they need to create and manage sites.
Pain Point 5: Inefficient Use of Document Management Features	<p>Mindsharp's UserVersity provides training on correct document management including topics such as:</p> <ul style="list-style-type: none"> • Creating and saving documents • Adding metadata • Searching • Collaborating • Using check in and check out • Version history <p>Users can choose training that meets their needs and fits into their busy schedule.</p>
Pain Point 6: Uncertainty that Confidential Information is Secure	Mindsharp's UserVersity provides training for end users on the topic of security. We provide thorough coverage on how SharePoint security works, as well as how to add or remove users from the SharePoint groups and permission levels. Users will gain confidence that they are securing their content appropriately.
Pain Point 7: Added Training Needs Burden Staff	Mindsharp's UserVersity provides an adoption manager that guides you through the program so you can make training decisions confidently. The advantage is that you are working with a SharePoint expert with years of training experience.
Pain Point 8: SharePoint Training Not Based on End User Needs	Mindsharp's UserVersity is structured to provide specific training for every role and function in your organization to ensure competency in appropriate SharePoint functionality. UserVersity provides over 90 different lessons that simplify SharePoint by breaking training into six key functional competencies. This allows end users to focus on the aspects of SharePoint that relate to them currently, and then grow into other areas as their use and knowledge of SharePoint expands. Training can be repeated when knowledge of a skill needs to be refreshed or reinforced.
Pain Point 9: Help Desk Unable to Answer SharePoint Questions	<p>Mindsharp's UserVersity provides multiple ways to assist your Help Desk including:</p> <ul style="list-style-type: none"> • Mindsharp has the leading SharePoint experts on staff who can answer questions from your Help Desk employees. • UserVersity has help desk crash courses to provide your IT and Help Desk staff with a thorough understanding of SharePoint. • The Help Desk can refer employees to specific computer-based training modules that address the user's problem. This is another way to provide the needed help without the Help Desk employee guiding users through each step.
Pain Point 10: Change in Organizational Culture Required for SharePoint to Be Accepted	Training with Mindsharp's UserVersity helps users understand the value of using SharePoint functionality. It goes beyond showing the "how" to teach the best practices and answer the "whys" in SharePoint. This approach helps increase end-user adoption and satisfaction.

Over the years, we have worked with so many organizations that really care about equipping users with the tools necessary to work smarter, not just use SharePoint. However, most of these organizations are frustrated about how to tackle the problems associated with rolling out SharePoint. That is why we say "Know More. Do More" - and we mean it. We want to help your organization improve its ROI.

Summary

SharePoint is one of the fastest growing corporate technologies on the market today. In fact, SharePoint has surpassed anticipated sales within Microsoft - but has the frequency of its use in your organization surpassed expectations? Just because your organization has deployed SharePoint does not mean it is being used successfully.

In this whitepaper, we have identified some of the reasons end user adoption of SharePoint is slow in companies and we offered ways to change that slow adoption. If companies create a SharePoint adoption plan that meets end user needs, SharePoint will be a tool they depend on to work smarter and faster.

About the Author:

Kim Lund has been educating users on SharePoint since 2003. In that time, Kim has taught hundreds of professionals and has heard about the many struggles organizations face when end users are ignored, training dollars are cut, and assumptions are made that end users will just figure out how to use SharePoint. Her passion to help find better ways to educate corporate employees has grown as she has led SharePoint training projects such as curriculum design, computer-based training, whitepapers, and other technical education endeavors. Kim realizes that users need a variety of learning options to accommodate busy schedules, address the varied tasks end users need to perform, and meet different learning styles since no two people learn the same way.