

The Backseat Driver's Guide to Governance Planning

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There's nothing more annoying on a long car ride than someone in the passenger or back seat of your car dictating your every turn, commenting on your speed (or lack of speed), and my biggest pet peeve -- constantly changing the radio stations you're trying to listen to. Nobody wants to be viewed as that back seat driver, and yet that is what some administrators and project managers have become when it comes to governance -- constantly pushing toward policy definition and enforcement, trying to enact best practices, while your SharePoint drivers (most likely your end users) just want to hit the gas and go.

A common pattern seen within any collaboration platform release cycle is the tendency to shift our attention from features to administration concerns over time, and as the deployment matures. For example, shortly after the release of the SharePoint 2010 platform, the vast majority of content from the community and from Microsoft itself centered around features. Locating guidance on administration and governance issues was a difficult task. It's understandable, of course -- from a customer perspective, they want to know more about the newest productivity tools, how to accomplish more with the platform. And from the vendor standpoint, you want to be selling the latest, greatest version because it's the shiny new thing -- it's easier to market and get customers excited.

The problem, however, is that the rush toward the "new" often ignores the realities of the current platform. The cycle will likely repeat itself with the next version of SharePoint: people will forget common sense, become consumed by the excitement of new features, and then slowly come back around (months later) to the governance and scalability issues.

Enter the organizational back seat drivers -- usually an administrator or experienced middle manager who understands, through experience, the pains associated with short-term thinking about the long-term governance issues any enterprise application will need to have in place. Where the organization wants to push things out quickly, get people up and running on the platform as early as possible, these back seat drivers will talk about scalability, repeatability, and process. End users will clamor for features. Back seat drivers will look to map these features to business value.

A Disconnect in the Planning Cycle

The primary failure in governance, whether SharePoint or any other enterprise application, is a general lack of planning. The problem of instant gratification (especially when it comes to technology) has become ingrained in our culture, and has slowly infiltrated business processes. One sure sign of this is a lack of consideration (and understanding) of corporate and IT governance practices. Far too often, there is an attitude of corporate ambivalence toward anything that may "slow down" progress.

Agile does not equal foolish. Or sloppy. You can be quick to market, and iterative in your release methodology, while at the same time following governance best practices. But it takes effort --

and it means developing healthy habits. Fundamental to any SharePoint deployment is a shared understanding of what is to be delivered. The end goal is not “to deploy SharePoint” but to solve one or more business problems, for which SharePoint is a tool to solve those problems – a means to that end.

The trap is that anything can truly be "out of the box." This may be true for the list of features available in the platform, but you still need to deploy and configure SharePoint -- for which there is no "best practice" for how it should be built to fit your organization. The allure of SharePoint is that it is a flexible and powerful platform for collaboration (which it is). The mistake is that it is a shrink-wrapped product that will meet the dynamic and ever-changing needs of your organization without proper planning, and ongoing management. In other words, a successful SharePoint environment includes a solid governance process.

Implementing Retroactive Governance

One of the most common questions asked is "How do I get started?" At the outset of any new SharePoint deployment – or an effort to clean up an existing, possibly even a failing deployment – is the need to review and reinforce governance and change management policies and procedures. Few organizations are without these policies and procedures. In the rush to get SharePoint launched, those policies were likely just ignored.

The first course of action is to identify existing practices, whether at the corporate-level, across IT, or within the SharePoint ecosystem within your organization. Find out what has been documented, and how those plans correlate to your overall business goals and needs for the platform. This activity will include identifying and reaching out to key stakeholders so that you can capture and update their requirements, helping better align their expectations with your outputs.

Second, you will want to thoroughly understand the key business drivers and use cases. What, specifically, are you trying to accomplish? Again -- this is not about deploying SharePoint, but is a question about the problem you seek to resolve by using the platform. Examples might be a centralized dashboard for displaying important business KPIs and metrics. Or a centralized list for asset management, with managed metadata to more accurately track IT and facilities attributes. Work with your stakeholders and end users to identify the problem areas to be solved through SharePoint, and then work with your deployment team to understand scope, complexity, and time to build out these solutions (whether using out of the box features, third-party tools, or customization), and then prioritize them based on business urgency and value.

Third -- and this is key to every successful plan -- make your plan transparent to your stakeholders and end users, sharing your strategy, your priority matrix so that they can understand the factors that went into your decisions (cost, time, resources, business value), and your change management model so that you can incorporate their ongoing feedback. The more visible you make this process, the more likely people are to support the output.

Take the Self-Quiz

Every organization has planning strengths and weaknesses. A best practice for one team may not be the best action for another, so it's best to learn from the experiences of others -- but apply only what makes sense to your organization and culture.

How healthy are your organization's governance practices? Take this self-quiz to find out:

- How important is governance in our organization/company today?
- Do you have a corporate governance plan in place?
- If yes, do you have subsequent governance plans (such as for IT) that incorporate/point to the principles outlined in your corporate governance plan?
- Do you have a SharePoint governance plan in place?
- If yes, who are the stakeholders included in your governance body? (End Users, IT Managers, Administrators, etc.)
- Do you have specific information management policies in place?
- Do you maintain Service Level Agreements with your end users?
- Do you have an operational change management model in place to review and prioritize feature requests and customizations?
- Do you regularly run audits on usage, security, content, or permissions?

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