

When SharePoint is awful ... 5 reasons we get called in to do make-overs

What to do about it and how to avoid it in the first place

At least once a month, we will have a call from an organisation who have become disillusioned with SharePoint. Some are do-it-yourselfers but most have paid for advice and help from Microsoft Partners. Why this steady stream?

Director & co-Founder [Grant Margison](#) is usually first on the scene of these train wrecks.

Here is what Grant rates as the top issues:

**Get SharePoint Right:
Strategy/Roadmap
2 day workshop: May 12-13
Wellington**

Grant Margison will be running another of these well received workshops to give you the tools and thinking to self-diagnose what's working and not, and then get a plan to move forward. [Details here.](#)

THE SYMPTOM & CAUSE	WHAT TO DO ABOUT IT	HOW TO AVOID IT, IN THE FIRST PLACE
<p>1. System is slow, unreliable</p> <p>The systems architecture hasn't been properly thought through, and/or its execution into the SharePoint server build has been poorly done.</p>	<p>You won't like but it's almost always best to start again! Patching up a poor build is like the Three Little Pigs story – if you build your house out of straw or sticks and not bricks then you will always have problems.</p>	<p>Avoid using MS systems generalists – SharePoint is very complex and tricky to set up and integrate with the rest of your stack. The best inoculation is 3 “stay safe” questions:</p> <ol style="list-style-type: none">1. Have the people who will actually do the design and build got the relevant and up to date Microsoft qualifications?2. Have they done it before? (if not don't even consider this option)3. Who can you directly contact to find out whether the people you will be using (not just the organisation) gave a “happily ever after” ending? This one is the most important 😊
<p>2. Search is crap – why can't we have Google?</p> <p>Search itself may not be setup right. Search can also be compromised through poor metadata design that is based on lots of metadata fields and content types that are not consistently used throughout all SharePoint sites.</p>	<p>Search can be reviewed and set up again or tweaked. This will include reviewing key use-cases for staff.</p> <p>Metadata changes are tricky but possible – it will require retrofitting the right metadata in all sites and libraries. Scripting and tools like our iWorkplace Smart Provisioning & Records Manager do the bulk of this efficiently</p>	<p>Search in SharePoint is amazing when done right, especially with custom templates applied that bring the power of metadata alive. You can also make it search file shares, SQL and other sources.</p> <p>Search needs to be deliberately designed as part of the information architecture (IA). Deciding on the right mix of metadata that is underpinned by a file plan (a hierarchy – usually the functions>activities>subactivities and case files of your business).</p> <p>A key tactic is sticking with a small number (usually under ten) of well thought through content types – read the iBrief paper on this.</p> <p>This needs IA specialists, not systems architecture experts or generic recordkeeper/IM consultants. Ask questions 2 & 3 of the “stay safe” questions above. We have found that MS qualifications cover search setup but not the overall IA unfortunately.</p>

THE SYMPTOM & WHAT TO DO ABOUT IT
CAUSE

HOW TO AVOID IT, IN THE FIRST PLACE

3. The money's gone and it still doesn't do the basics

SharePoint has been treated as a software & workflow platform first and good general purpose ECM (enterprise content management) system as an afterthought

If the people/partner involved is primarily skilled in software development or custom scripting then that's what they will do – and it costs a packet and often tries to replicate functionality that is out-of-the-box (OOTB).

You need put on the brakes and stop the money burn and get someone skilled in OOTB to do a review and take it from there.

Our IA design mantra is: Out of the box first; [iWorkplace features](#) second; other reputable extensions third (e.g. Nintex; Colligo), **software development or scripting only as a last resort.**

We have done over seventy implementations of SharePoint and it is rare that we ever need software development and scripting! When we do, it's usually 1-2 years down the track when they have a maturing ECM and now want more – specific integration or business process support.

A common mistake is leap frogging from “we need a better business process” to “we need SharePoint workflows”. You can get a huge amount of business process in SharePoint without resorting to one off workflows.

Again, ask the three “stay safe” questions before you put your SharePoint success & your reputation in the hands of others...

4. It's hard to use and inconsistent

This usually comes about because the design hasn't been locked down – staff are “empowered” to manage their own sites. So users get a different experience wherever they go – from project site to team site, to intranet...

Empowerment is all very well, but they need the training, time and discipline/governance to do this right.

We usually start with an assessment and come up with priority lists on what to change or standardise. Often we will let existing sites “rest in peace” but put a design pattern in place for future sites.

Also specific (not generic) power user training & mentoring, geared for your implementation can make a huge difference

IA and Governance. You need to deliberately design the information architecture – in particular branding, navigation, metadata, search, site, list and library designs. We do this via our Design Wiki – 200+ pages of detailed questions and answers on how SharePoint is configured. You start with a copy of our Design Wiki and accept or modify it so it becomes the living documentation of your design. This will include key **design patterns**, like team or project sites that avoid power users having to provision from scratch (i.e. make it up as they go). Typically there may be 10-20 of these patterns.

Training and Certification. Not everyone is cut out to be a SharePoint design and build person. You should avoid developers, tinkerers & innovators – those that see every new site needed as an opportunity to show their flair. Standardised training and mentoring (not generic Power User courses that do more harm than good) are best, coupled to certification – tests that confirm those doing this vital work are up to it.

Governance & Monitoring. The golden rule is, you can design & build what you like, AS LONG AS IT'S IN THE DESIGN WIKI. If a new need comes up that is not, then this is up to a design group to decide and then document. Monitoring is really important – our iWorkplace Records Manager allows you to see what libraries are being created and how they are set up. It also allows you to check for metadata use anywhere and if necessary update metadata in bulk.

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<p>5. Why do we have SharePoint anyway – it's just a waste of money & time</p> <p>SharePoint has just "happened" to the organisation without thought on how it connects to business drivers and how it relates to other IT priorities</p>	<p>A review is needed on the key "roadmap" themes that should be in place – business case, systems architecture, information architecture, intranet use, document management use, training, tech support, internal empowerment, governance.</p> <p>A good place to start is our 2 day public (next one May 12-13) or private "Get SharePoint Right" workshop. It covers all the bases and lets you self-diagnose then get a plan on moving forward.</p> <p>If change management & governance is a key problem then Director Sarah Heal is running our well received "Change Management/Governance" 2 day workshop in Wellington 5-6 May.</p>	<p>We undertake a "Scoping Document" assignment, that maps out all key components of a successful implementation. This uses our "Decision DNA" model (see DNA article here) to ask and answer specific questions about your unique situation.</p> <p>The resulting roadmap covers all the bases and acts as a way to start engaging and energising key people as to why and how your organisation should implement, use and exploit SharePoint.</p> <p>Often this will include a business case and in some cases step back and include an "IM Strategy" or "Digital Workplace Strategy", to ensure it locks into business drivers and other initiatives.</p> <p>If you are looking at other options then the key "stay safe" questions are:</p> <ol style="list-style-type: none"> 1. Have they done it before (if not don't even consider this option)? 2. Can they show examples and credibility for all aspects – i.e. not just technical or strategic? 3. Who can you directly contact to find out whether the people you will be using (not just the organisation) gave a "happily ever after" ending? This one is the most important 😊