

Five Essential Qualities of a Floorwalker

This article sets out five essential qualities for a Floorwalker to possess in order to maximise the likelihood of your SharePoint deployment succeeding, namely:

- Training skills
- Communication skills
- Change management
- Social Expertise
- Understanding the SharePoint platform

1. Training Skills

The Floorwalker role includes a large amount of training.

Because a new system affects many different people (all with varying degrees of knowledge and expertise); the Floorwalker must be able to alter their natural teaching style to match the needs of the users.

This does not require a high level of technical knowledge. In fact, this can be detrimental to trainer as users are generally not technical either. This avoids bombarding them with an 'overload' of technical detail.

2. Communication Skills

The Floorwalker must be able to communicate well with Upper Management, General Management, Technical Experts, Subject Matter Experts and Users.

It is essential that they see themselves as an advocate for the users.

Collecting feedback from users and the confidence to escalate issues is vital. Often this is the only way user's issues are brought to attention.

Excellent listening skills are essential for this process because the Floorwalker must quickly pinpoint problems, understand different language sets and pull the loose threads out of what people say.

Often the Floorwalker is the person who conveys messages to the users from the project team; this requires clear and concise communication.

3. Change Management

The core success factor underlying any new system is whether it's being used and whether it's being used properly.

The Floorwalker must encourage a user's transition from their exiting habits to the new desired way of working. A competent Floorwalker will monitor this and pick up on any change management issues. Understanding business requirements and being able to communicate clearly 'what's in it for the user' can help.

Individuals who are enthusiastic and can motivate others are best suited for this role.

4. Social Expertise

Developing a relationship with teams and being likeable and amenable is an important.

Because the role is so strongly relationship based and requires a good understanding of users (their technical skills, record keeping skills, culture, adaptability, bugbears...).

Maintaining a strong relationship is important.

Floorwalkers must observe users without making them feel uncomfortable.

5. Understanding the SharePoint Platform

While they don't need technical knowledge, it is essential that Floorwalkers have an advanced level of user knowledge so that they can train the most competent users.

It is also useful for a Floorwalker to have a reasonable understanding of SharePoint assets so they can look for quick wins while rolling out the implementation.

The Pre Go Live Phase

This article provides an overview, and recommendations of what's required of a floorwalker during the Pre-Go Live phase of a **SharePoint** implementation. The principles can be adapted to any other EDRMS as required.

It is the first stage the Floorwalker is involved in; users have not been introduced to the system yet and the Cookie Cutter (the person who creates the sites) is likely to still be completing the Sites.

Understanding the Design

The Floorwalker must understand the Taxonomy (or Business Classification). Users often struggle with understanding the design because prior to this new system many of them would have been filing their documents using their own structure.

Many users resist this change as they are quite content with their filing (although they can't find anyone else's because 'Sally doesn't file logically'). This change process can be managed best by the Floorwalker clearly showing users where their document's new location will be. If they don't do this, or do it inefficiently, they're likely to face change management difficulties down the track.

Recommendations:

The Floorwalker should read the design plans or complete a thorough navigation of the sites to get a clear picture of the classification.

Discussing any uncertainties with the Information Architect is recommended at this stage.

Looking at the old system and try to find locations for sets of documents in the new taxonomy.

It may even be worthwhile sitting down with a manager or Key User and going through some of their files to check if the taxonomy functions effectively. It's easier to do this now with one user than at a later stage during a large training session. Although the taxonomy may have already been validated this is an excellent way to double check the design and to gain an understanding of the type of documents the team creates. If the Floorwalker is unable to find a location for a set of documents they should discuss this with the Information Architect.

Introduction to the Users

Establishing an initial relationship with the team is essential. They are likely to have heard about this strange new system and are usually curious; there are also the change adverse people who feel anxious about adjusting.

Providing a clear path to communicate through is the start of the change management process. The Floorwalker should make this initial step which will help quash some of the anxiety and encourage enthusiasm.

Recommendations:

At this stage the Floorwalker may not have a clear picture of what the teams needs are and should be cautious in how they communicate. Promises and false claims about what the new system can provide can damage users' initial experiences. Instead, the Floorwalker should attempt to ease users' minds by assuring them that they will have support throughout the process.

Look for power users. Managers will be able to advise you of the people in their teams who create the most documents or who are competent with computer systems. By giving them a sneak preview the Floorwalker can gain their buy in, which is invaluable during the initial training. Often PA's or Administrators are excellent people to have on board early.

If the Floorwalker hears comments or has concerns following interaction with the users it is vital that this feedback is passed on to the project team (whether it is users seriously concerned about the system or lack of management support).

Developing a Training Strategy

During this initial phase the Floorwalker should start to think about their training strategy.

Are the users technically competent? How many documents do they create? What parts of SharePoint are they likely to use? This can help the Floorwalker in the initial training as they have a clear picture of who to direct the training towards.

It can also be useful to have an understanding of the different skill sets within the team. Some teams may create very few documents but use the collaboration assets a great deal; therefore during the initial training session it may be useful to focus on collaboration.

Recommendations:

The Floorwalker needs to be very clear about how they will teach the users. In SharePoint there are numerous ways to complete an action (such as editing a document using the icon or the drop down menu or the multiple ways to navigate). Initially, users need to be shown only one way - to limit the amount of new information they need to retain. Although encouraging them to explore the system is important, understanding the basics is paramount. It also creates consistency across the organisation so everyone is speaking one language and those who are more capable can support other users knowing how they were initially taught. If consistency is not maintained users can get confused and grow to dislike the system.

For teams with vast differences in technical abilities or documentation needs it may be worthwhile completing separate trainings for each level. For example, a team who uses project sites verses a team who creates operational documents. Approaching the team's manager is often the quickest way to understand the different expertise.

The Go Live Phase

The Go Live phase is a busy time for floorwalkers. During this phase they must implement their training plan by providing initial training to users. Floorwalkers have a large part to play in making sure Go Live is successful and must ensure that users don't feel abandoned.

The Initial Training

The initial training should be no longer than 1.5 hours. We find that the following topic areas are appropriate for the first training session.

Preconceived Ideas: An initial question to users about what they know about the system already – this can be useful for understanding any inaccurate preconceived ideas and correcting these before the training begins.

“What’s in it for Me and the Business?”: An outline of what the new system will provide them with and the business reasons behind the project.

Access to the Site: Setting up the Site as a favourite and adding a shortcut on their desktop (if logged on at their individual computers).

Navigation: Showing users how to navigate the site using the breadcrumb trail, back button, left hand navigation and any additional navigation tools that may have been created.

Taxonomy: A clear explanation of the taxonomy and what each document library is for. If users struggle with this the Floorwalker may need to request a description is added to each page. It can be useful to have the manager and any potential power users at this first training because they can help to clarify what document libraries are for in the teams' own 'language'. The presence of the managers and power users also emphasises their support for the new system.

Uploading and Creating: Go through the step by step process for uploading and creating documents. Explaining the different types of metadata, the required fields and the importance of users filling these in.

Opening, Editing and Saving: Demonstrate how to open, edit or save documents.

Send To and Copy Shortcut: Show users how to send each other hyperlinks and copy document shortcuts.

Search, Views and Browsing: Show how to search, view and browse documents.

Deleting: Show users how to delete the dummy documents they've created.

Follow up Support: It is vital to finish off by clearly outlining the support users will be given, assure them that the Floorwalker will be around for any questions and give them contact details and an outline of how to arrange additional training.

Additional training: additional training to consider includes: sending email attachments, copying and moving documents, creating views, making authoritative versions, updating bulk metadata, check in-out, version control, workflows, alerts, collaboration assets and photo libraries...

Training could incorporate additional material depending on your system's assets and the competence of your users.

Recommendations:

If possible try to group trainees by team.

The initial training should be hands on, with every user on their own computer.

The Floorwalker needs to have computer access during this training as well so that they can check settings if problems are encountered.

The Floorwalker should ensure that they are training the correct people; if there are employees who don't use the system don't train them. The simplest way to avoid having the incorrect people at a training session is to speak to the team's manager beforehand.

Spend extra time going through where documents should be stored. This is often the area which users struggle with the most and having a clear picture is imperative. It is also useful to ask users for examples of documents they have and to come up with a location for them as a team.

Arrange Follow-up Training

Following the training the Floorwalker should have a fair idea of users' skills and can schedule immediate follow up training. This can be for users who struggled or users who had lots of unanswered questions. Follow up training can be scheduled at the end of the initial training session.

After the Go Live the Floorwalker primarily plays a monitoring and user support role. This is usually reasonably intensive after Go Live and then gradually tails off as people become more confident.

The Post Go Live Phase

The phase after the deployment is when the Floorwalker's job really begins! It's primarily a monitoring and user support role and is most intensive in the first three months after go live.

Monitoring Usage Volumes

One of the key indicators of success is system usage. This is a simple check of the volumes of information being stored and the individuals who are creating this information.

Alternatively, for more sophisticated reporting, an iWorkplace extension product, Smart Records, offers incredible functionality for monitoring and reporting on user adoption.

If the file share or previous system is still available to users the Floorwalker can contact IT for a report on what documents have been created there since Go Live. This can help the Floorwalker gain an understanding of the volume of these documents and the users who have not successfully made the change.

Why People Might Not Take to Using the New System

Before jumping to conclusions as to why users aren't using the new system the Floorwalker should check if the individuals actually create a large amount of electronic documentation. They may not.

Alternatively, there are a number of common reasons users may not be working with the system. Discovering these and providing additional support is important:

Documents Don't Have a Place in the Taxonomy: Users may not be able to find places to store their documents. They're likely to give up quickly and resort to using the old system.

The Floorwalker should understand what each document library is for (knowing what keywords, cases or category values are used in each library can help with this process).

If a location can't be found the Floorwalker should find out if other users are creating the same documents and where they are filing them. New metadata may need to be added to a library if a section of documents does not have a location. If the Floorwalker believes there is no appropriate location they can speak to the Team's manager who may have a more holistic view.

If the Manager can't find a location for the documents then the Floorwalker should contact the Information Architect and discuss the design options. Usually adding additional metadata to a Library after consultation with the manager will solve the problem.

Users find the new system hard to use: If the users are struggling to use the new system extra training may be required. Identifying common problems across the Team may be useful as the Floorwalker can then provide training for a group of users. Demonstrating how previous teams have utilised the system can also be useful.

Integration Issues: If users are experiencing integration issues with their documents, the Floorwalker may have to consult a technical expert. It is important that even if all the content cannot be incorporated into the new system these users are provided with a clear picture of how to manage their information and what content is supported.

Recommendations:

The Floorwalker should never assume any of the above. When approaching users to discover why the system is not being used the Floorwalker must listen attentively. Often users aren't fully aware of why they don't want to use the system but they will identify specific concerns. These problems will create a picture of the underlying problems.

Identifying usage problems early is important, the longer it's left the more resistant the users feel.

If there are document libraries not being used find out why.

Monitoring how the system is used

The Floorwalker should monitor how the new system is being used, especially during the first two months. If it's being used incorrectly then it can quickly degrade into an unstructured mess that is little better than the system or file share previously in use.

If people are constantly misfiling documents or not filling in metadata additional training may need to take place. When users are filing their documents incorrectly it may be worthwhile sitting with them for 30 minutes and going through their old documents or folders and finding places in the new system for these.

Recommendations:

Personal Assistants and Administration Assistants are great people to help with this. If they understand the system well they can help monitor their team's document storage.

Engaging the manager in this process can also be useful; they can speak to their team during their team meetings and help clarify where documents should be located. Often managers search and browse documents and it is in their best interest to have these standardised.

The Floorwalker should check what metadata fields aren't being used and find out why. If they are not applicable it is best to remove them and free up screen real-estate.

User Support

One of the primary and on-going roles of the Floorwalker is providing user support. This requires that the Floorwalker is approachable. This role includes literally 'Floor Walking' the building. Many users won't approach the Floorwalker with issues initially; often they think it's their ignorance and not the system.

However, if asked if they've got anything they don't understand often users are delighted to list the issues they ran into yesterday. This is a great way to receive feedback from users.

The Floorwalker should deal with these problems first hand if they can and follow up on them if they can't. Following up on every problem or question is vital because it helps create an image of the system being reliable and the support consistent. This role includes:

Reoccurring Problems: Looking for reoccurring problems or needs and ensuring these are solved or fulfilled efficiently.

Validate the Users: Recognising that everything a user says is important and validating this by giving them respect. No question is ridiculous and no problem is insignificant. This will encourage users to be open with the Floorwalker.

Quick Wins: looking for quick wins by utilising some of the SharePoint functionality such as Calendars, Lists or Discussion Boards.

Maintain a Strong Relationship with IT: Having a good relationship with the IT Team is also important for the Floorwalker so they can access information and support when needed efficiently.

Communicating with the Site Builder: The Floorwalker should be able to contact the Site Builder if a setting is incorrect.

Permissions: Viewing permissions and permission groups can help a Floorwalker quickly identify if a user has access to a site. Because they are the primary contact for the users being able to identify access permissions is important.

Identifying Training Gaps: The Floorwalker should be able to separate technical and user problems. Generally user problems will require additional training.

Supply Feedback: By providing user support the Floorwalker should be largely aware of the user experience. Because of this it is the Floorwalkers responsibility to report back to the project team, providing feedback or reports on the problems and concerns experienced.