



White Paper How Do Companies Use Sharepoint in the Real World

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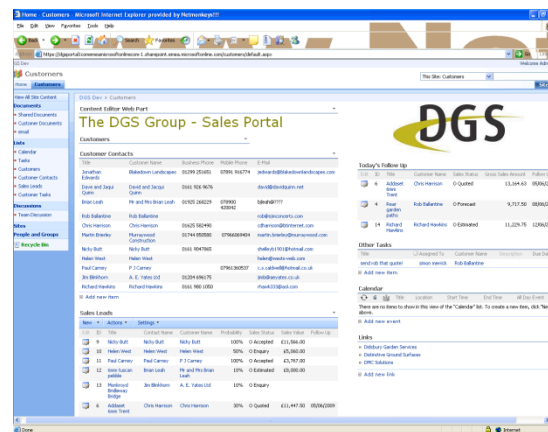


How Do Companies Use Sharepoint in the Real World?

Beyond the marketing hype how is Microsoft's Sharepoint Really Deployed and Used? Can the product really bring the sorts of benefits that are promised? Is it really any different than the whole host of Document Management products that have been around for years?

Staff at NetMonkeys has over 40 years experience in the field working with many different Information Management systems including heavyweights like Documentum and departmental solutions.

I have worked on major implementations at organisations in utility companies, Oil and Gas, Pharma and global finance companies, leading projects in Sharepoint and competitive offerings. Over recent years I have done more and more projects in small and medium sized companies, which is where Sharepoint has really started to make a huge difference to business efficiency.



In the larger companies I believe that implementations have tended to focus purely on document management or to manage company web sites.

A lot of this is due to the size and complexity of any major IT project. A document management project will take two years and that's equal to the age of Sharepoint 2007.

So, despite its promise to be a complete Information Management platform it is too early to really judge the impact in large corporate companies.

However, whilst large corporate have usually lead the way in information management systems, medium and small companies are considerably better placed to lead the way in making full use of Sharepoint and really reaping benefits as a result.

What really is happening?

Firstly there are plenty of companies making a tidy mess of the whole thing. Left to their own devices many IT departments have seen Sharepoint as an exciting new playground for developers to let their ideas run riot. This produces many interesting but irrelevant applications that flounder for all the sorts of reasons that IT projects do flounder: Lack of management support, no attention to business change etc.

So, it's important to consider the likely facts behind any negative stories.

With good project management, adherence to best practice and the involvement of experienced professionals however, Sharepoint really is hitting the mark as I shall now illustrate.

Typical Scenarios

As a precursor to this section let's assume that all companies have the following departments:

- Marketing – lead generation, advertising, formulating new products and services

- Sales – bidding for new work, managing customers etc
- Operations/Projects – undertaking new projects, producing products
- Support/Maintenance – looking after existing customers, maintaining assets
- Management – overseeing the whole business, making high level decisions
- Administration – finance, HR, QA etc

Of course some companies may not have some of the departments above but are still likely to do the work listed within another department.

Traditionally, IT applications have focused upon one department. Creating a silo of information, often with barriers to anyone else using (or easily using) the system e.g. an Asset Management system.

The most successful implementations have looked at the bigger picture and all departments. They look at how information flows and is processed through the entire company (since different departments need to share the same information).

Information needs to be focused not on departments, but on the processes and components of a business. But what is the key aspect that information should be built around? Is it projects, customers, assets, cases etc? Understanding the high-level business is important to establish this.

Once this is established, a Sharepoint deployment can be conceptualized and planned. However, this does not mean doing everything at once.

Starting Points

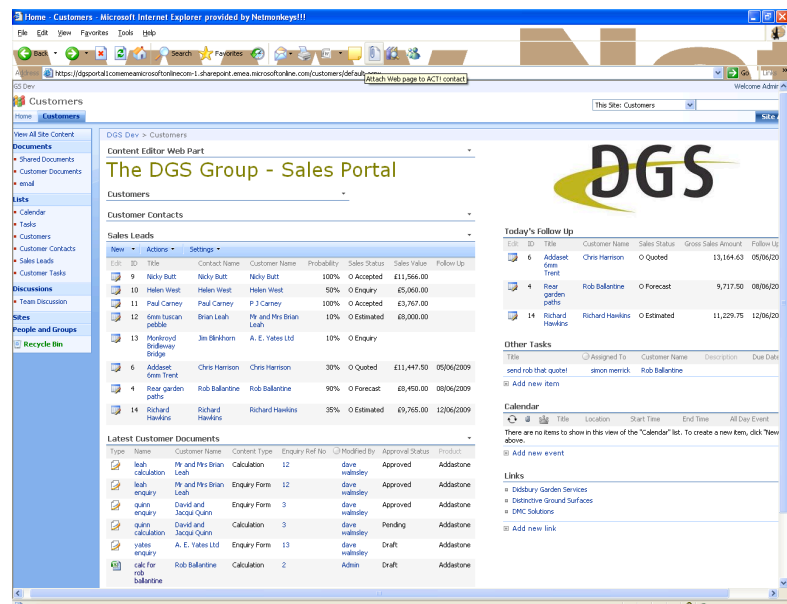
Quite often the starting point may be the sales department using Sharepoint to manage sales leads, sales related documents and other content (tasks, schedules, contacts etc). Of course, some companies still need a dedicated CRM system for this, but for those that don't, Sharepoint does more than just an adequate job and eliminates extra software, support and training costs associated with CRM. CRM systems can be integrated with Sharepoint!

So, as an example, one of our customers who sells and installs resin surfaces to business and residential customers (driveways, restaurant floors, tables etc) gets sales leads from different sources. The Sharepoint system acts as a database to manage, track and progress these leads and as a repository for enquiry forms, proposals and calculations.

The system is workflow enabled, meaning that sales proposals are automatically routed to the sales director for approval. Other tasks (e.g. to send out a company brochure) are also allocated and tracked by the system.

Tasks and other appointments are stored in a calendar.

Nearly ALL customers use MS Outlook for email! Therefore, as part of the initial project they want the ability to have; workflow tasks delivered via email, to be able to drag and drop email correspondence into shared



The screenshot shows a web browser displaying the 'The DGS Group - Sales Portal'. The page is divided into several sections:

- Customer Leads Table:** A table with columns for ID, Title, Contact Name, Customer Name, Probability, Sales Status, Sales Value, and Follow Up. It lists several leads, including 'Nicky Butt', 'Helen West', 'Paul Carney', 'Sean Tuscian', 'Richard Hawkins', and 'Rob Ballantine'.
- Customer Documents Table:** A table with columns for Type, Name, Customer Name, Content Type, Enquiry Ref No, Modified By, Approval Status, and Product. It lists documents like 'calculation', 'enquiry', and 'calc' for various customers.
- Today's Follow Up Table:** A table with columns for ID, Title, Customer Name, Sales Status, Gross Sales Amount, and Follow Up. It shows tasks like 'Addset Green Trest', 'Rear garden paths', and 'Richard Hawkins'.
- Other Tasks Table:** A table with columns for Title, Assigned To, Customer Name, Description, and Due Date. It shows a task 'send rob that quote' assigned to 'sean merrick' for 'Rob Ballantine'.
- Calendar:** A section indicating there are no items to show in the current view of the 'Calendar' list.
- Links:** A list of links including 'Delbury Garden Services' and 'DMC Solutions'.

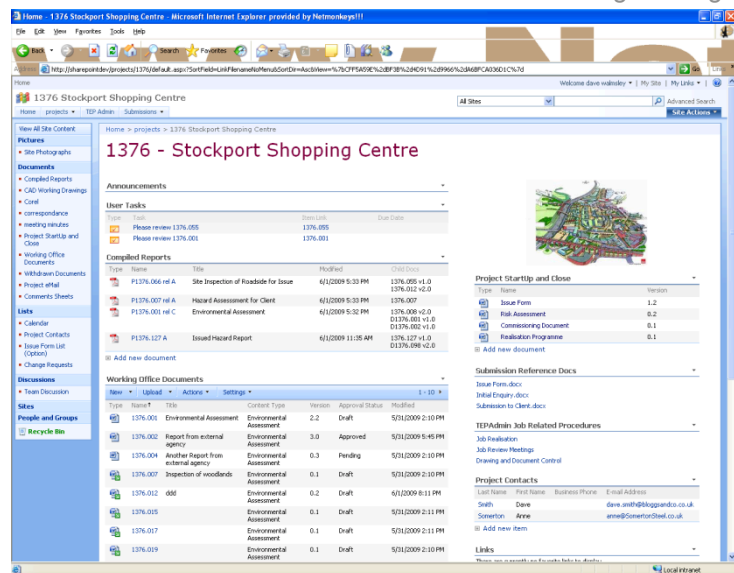
customer files, and to add to and see Sharepoint calendars.

So that may constitute the first project.

Phase 2 – Operations and Document Management

The great beauty is that once this is established a company may then turn its attention to managing operational documents. For example, one of our customers undertakes some sizeable engineering projects and needs to manage the drafting, review, approval and issue process of reports, drawings and other documents that are sent to the client. Sharepoint is able to provide very good basic Document Management functionality.

Version control, workflow for review and approval, templates, and integration with Microsoft Office are all easily achieved.



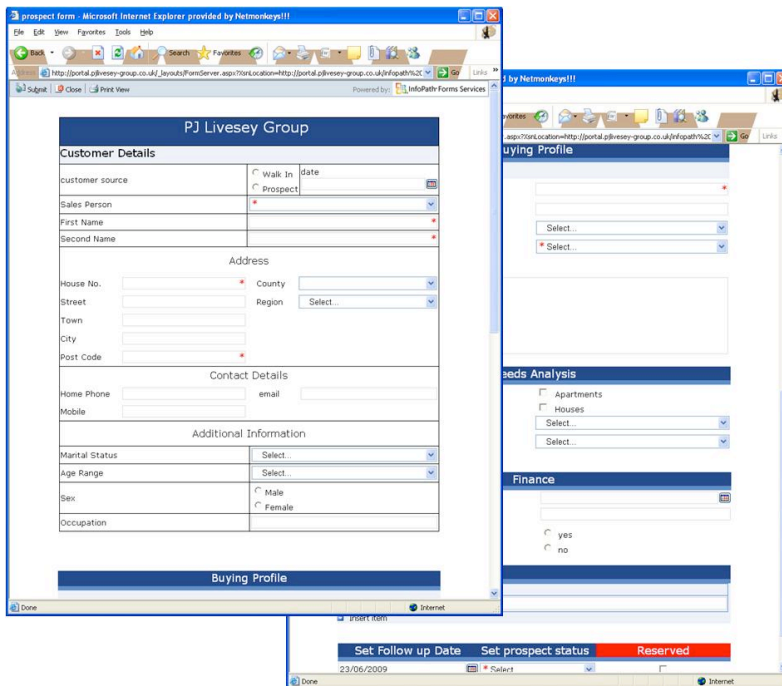
Usage of Forms

Having established the management of documents, forms may come next. Forms are often shoehorned into a document format but they have different characteristics that documents do not have. For example, a change request form may have one area which the requestor fills in and another area for the approver to complete. The two different areas of the form need to be protected from the wrong party filling them in.

Forms also need to be very data centric. Fields on forms come from the underlying database. This is something that Sharepoint does extremely well. Our sales driven company are already storing contact information (such as name and address) that should not need to be retyped.

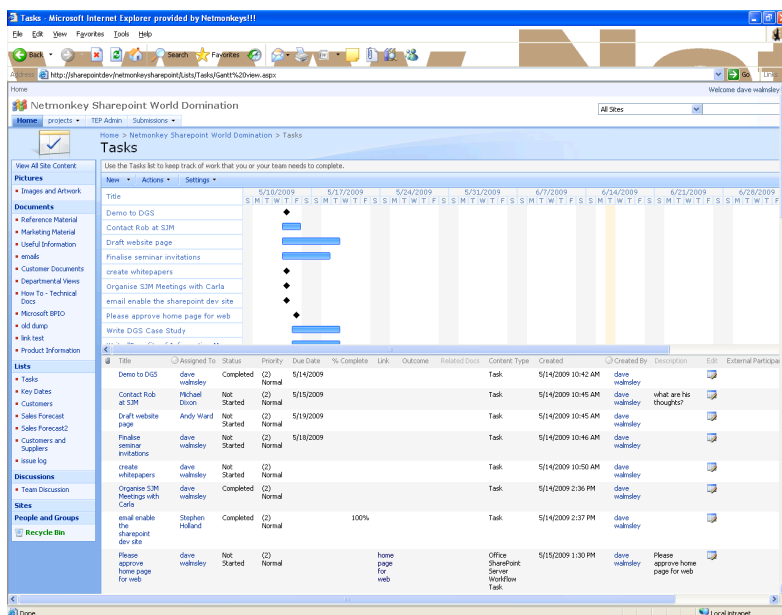
Furthermore, creation and deployment of forms is so easy that you do not need a developer to do it.

One of our customers, a house-builder, uses forms to gather user profiles and have different sections within the company add to the different parts of the forms. For example, the finance department adds information relating to mortgage applications but cannot access other parts of the form.

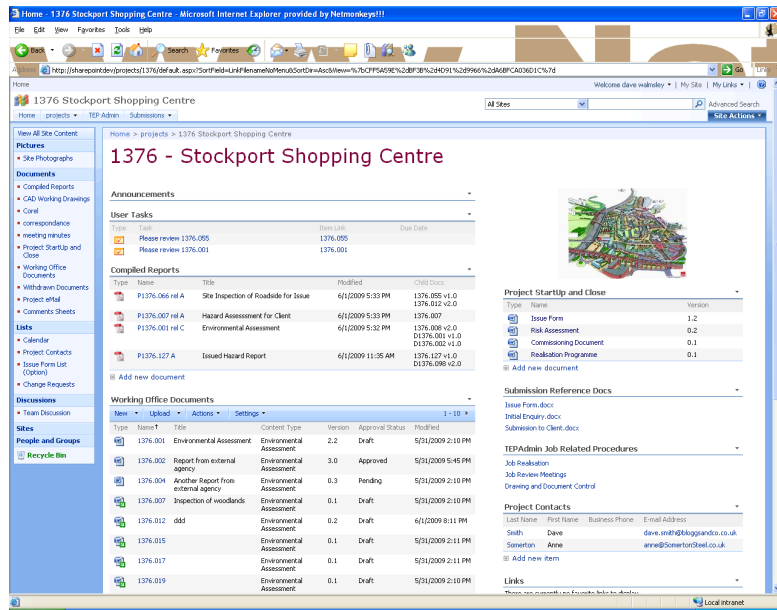


Project Management and Planning

Sharepoint makes a great environment for project management. Projects involve plans, tasks, issue resolution, change management, and document production and approval. All of these are native features of Sharepoint and often require little setup.



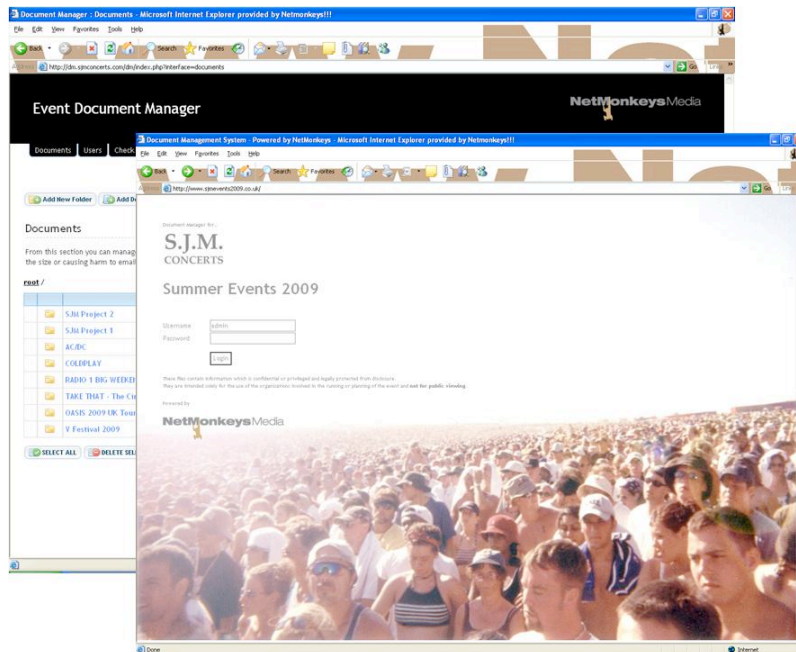
Sharepoint is not a heavyweight planning application – so some customers continue to use MS Project and upload plans periodically. Others can use the basic planning functionality. As this generates tasks that are assigned to people and can be sent to assignees via Microsoft Outlook, monitoring of progress is easy. These tasks also sit alongside document management review and approval tasks.



Importantly, new project “sites” can be quickly created from templates so that every project is managed in a standard way.

External Access

Once organizations have got information under control there are large benefits to making this available to outside partners and contractors. SJM, one of our customers, has over 500 contractors that might need to access one or more documents relating to an event (for example, the local authority will need the site plans to check access and security arrangements).



Many of our existing customers already have FTP sites where information is uploaded. However, quite often these same customers also need to record that contractors have been notified of new

information and which version they were sent. Also, the FTP site starts to become difficult to manage. It is important that correct versions are displayed and old versions removed etc.

Sharepoint solves this because the publishing is automatic.

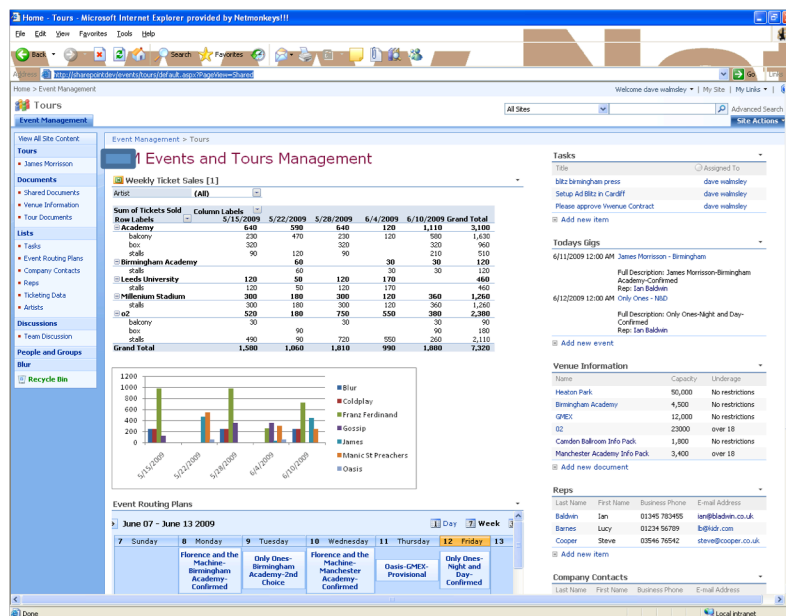
Phase 3 – Business Intelligence

Managers of companies need regular reports. Quite often these are run on a monthly basis and emailed around. Some companies use Excel to build intelligent reports that people can interact with.

Sharepoint is able to take this a step further. Within the pages presented to end users, live reports can be placed that users can not only view but interact with.

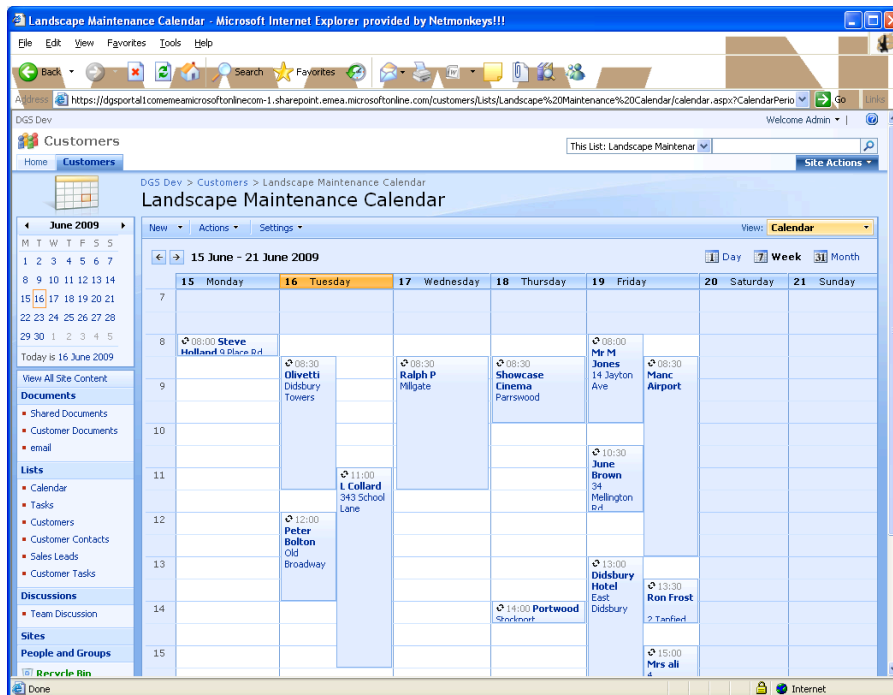
So, as an example, an event management company, looking at a specific event page might be able to see live ticket sales data for that event. Maybe the promoter wants to see how sales have gone over the past four weeks or which sources the ticket sales have come from. This sort of information enables quick decisions about advertising spend.

Because this information can also be combined with other content (such as the touring schedule of an artist and the venue availabilities) he/she could then see whether ticket sales warrant a second night at the same venue. Or, if the venue plans were there, see whether the layout could be changed to free up more seats.



Phase 4 - Support and Maintenance

Support can be easily managed by usage of Issue Tracking (a native application), but the powerful calendaring functionality can be used for scheduling routine maintenance. DGS Group provides routing periodic landscape maintenance. This means they can keep a regular schedule for the maintenance staff and to be easily able to move appointments around where required.



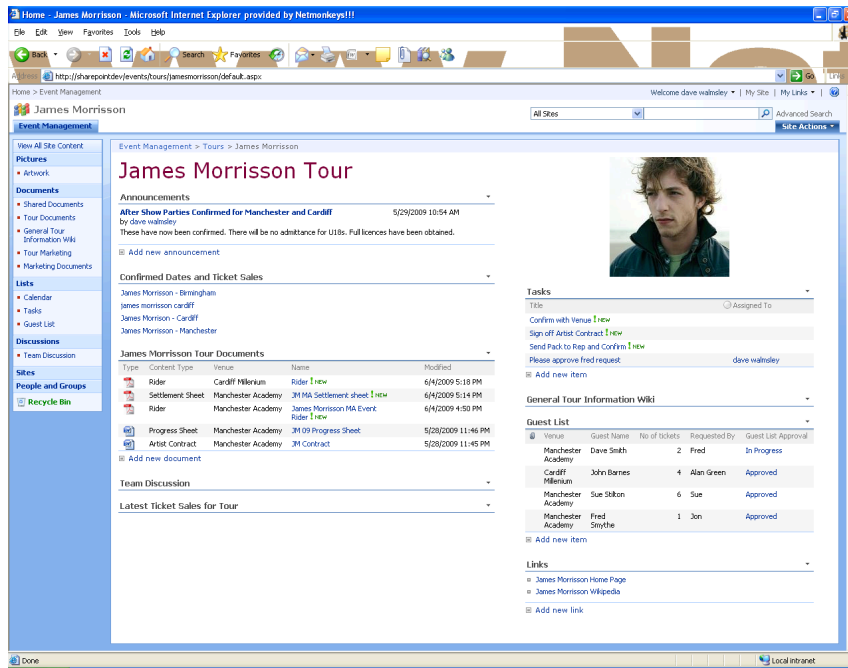
Phase 5 - The Portal Interface

Having already worked out the master plan, and implemented many of the component parts, a company then has a lot of information that it needs to present in a logical way. However, what is logical for someone in sales may not be logical for someone in operations. Different dashboards or portals are created for all this content to be presented, filtered, and targeted so that employees can see the content they need when they need it.

As an example, one of our customers is a company that manages multiple major music events and tours. The company needs the collective input of many different departments (marketing, ticketing, production etc). Whilst all event based data and information is stored in one place, the managers of the business need a high-level view showing ticket sales, the overall concert schedule, venue information, contract documents etc.

Other staff (for example, the reps that manage specific events) need to be able to drill down to one event or show and see the information such as venue contract, local arrangement for disabled people, tour artwork etc.

The marketing department will primarily just need to manage artwork and communication with agencies but ALSO need ticket sales data to target leaflets.



Finally, what about NetMonkeys? We also use SharePoint too, and would be delighted to show you how!