7 KEYS TO MASTERING THE DIGITAL WORKPLACE
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7 Keys To Mastering The Digital Workplace

Over the last 20 years, the workplace has changed dramatically with the ubiquity of mobile devices, cloud computing and social tools. These combined with traditional collaboration and content management solutions provide a powerful arsenal of tools, but organizations are struggling with how to pull it all together into a cohesive user experience that will drive productivity, improve employee engagement and help them retain their best employees.

The magnitude and pace of the change can seem intimidating. Implementation can seem like a big project with an uncertain payoff, information design and governance strategy can sound arcane and tedious, and user adoption can seem like a moving target. However, none of these obstacles have to hold back any company from flourishing. In many cases, the strategies that work best turn out to be logical and straightforward, and the technology available today makes it easier than ever before to deliver tailored solutions that connect people and content while minimizing the cost and complexity of custom development.

Embracing this new range of solutions, including social, mobile and collaboration, can pay big dividends for companies in productivity, efficiency, innovation and collaboration. Using an enterprise collaboration platform can keep documents secure while allowing users to work on them together without having multiple unreconciled versions floating around email inboxes. Social enterprise tools can help users engage in real-time conversations and find experts in other departments or offices who they might otherwise never have contacted. Enabling mobile access to tools and information can eliminate bottlenecks, allowing users to be productive wherever they may be by providing a quick project status update or approving a leave request. This is an especially great advantage for companies with many employees who work in the field but now feel like they are disconnected, out of touch and falling behind when they are out of the office.

The key to success with these systems and concepts is to think of them not as isolated tools, but in a more holistic way. They each can have a valuable role and come together to create an effective digital workplace. The goal for any business should be to apply the appropriate tools and strategies to meet the specific needs of users while making sure that they are informed, not overwhelmed. This e-book offers tips and ideas for getting the most out of the tools available so you can begin accelerating your path to the digital workplace.
Getting Your Business Ready For Social

Social tools are becoming more common in the enterprise. Some companies are skeptical of these tools, worried that they’re just a fad or that they’ll turn into a time drain for employees. However, these tools aren’t going anywhere. All indications are that Microsoft and other makers of enterprise software tools will continue to integrate social tools more tightly into their products. That’s good news, because when they’re implemented smartly they can foster quick communication and innovation. So, how do you get there?

There are several factors that go into the successful use of enterprise social networking tools. The overarching one is having the right mindset and strategy, which means using social enterprise tools where they make sense to serve specific business purposes. It won’t work to just put a newsfeed on the intranet and expect improved engagement and innovation. However, social can be a valuable piece of the digital workplace. Just think of social as one more channel of communication with some unique advantages.

One of the best ways to ensure a successful implementation of enterprise social features is to stack the deck in favor of success from the beginning. This means realizing that some users just aren’t going to be interested in using social tools, and it would be a waste of resources to try and force the issue. Choose a user group, such as a team or department, which already works in a collaborative way. Enterprise social networking is a stream of questions, answers and comments. If a team doesn’t already work that way, you’re really asking for a human effort to change a business process, not just a technical change. That’s likely to cause frustration and poor adoption.

On the other hand, many users will immediately understand how to use social tools with little or no training. One example is the rollout of a new intranet for a global nonprofit organization with about 4,000 employees. The intranet had a social newsfeed in the support section where users could ask questions and get help. There were no plans on launch day to do anything but to let people know the new site was available and answer a few questions on the newsfeed. After an hour of being available, there were more than 100 answers. The users didn’t have any training on how to use the system; they just understood it.
Social can also be beneficial on the back-end of tech support. Technicians can more easily collaborate on tickets instead of trying to track down the needed people and information via email, and the conversation is preserved for future use.

In fact, there’s a real possibility that social features will eventually completely replace email for some purposes, which could be one of the greatest benefits of these tools. Social tools are great for remote workers, and are also well-suited to maintaining a good work-life balance. Nobody feels pressured to write a dissertation after dinner in response to a question posed on a newsfeed; they can just zip off a quick response. Even more exciting is the analytics of communication made possible by the widespread use of social tools. You can get a much better picture of how employees are communicating and reaching innovation, and adjust accordingly, in a way that would be impossible with email.

Remember e-everything? Not just email, but e-banking, e-shopping and so on. Now that we just expect everything to have some digital aspect, making the distinction hasn’t become as necessary. The same kind of change is likely to happen with social enterprise tools. The term social will disappear, and it will just be an accepted functionality in the everyday business world. Businesses now have a great opportunity to get ahead of the curve and look at how the wide range of social features available can be integrated into their enterprise.

The main challenge that companies face when implementing social is that people tend to misunderstand the benefits of social and fail to see it as just one more tool within a larger collaboration toolbox. While social certainly represents an innovative step forward, this way of working isn’t radically different from all earlier collaborative tools. It also doesn’t apply to every aspect of your organization.

Some business functions may be inherently inappropriate for social. Creating and sending out invoices, for example, doesn’t seem well-suited to social — the activity is straightforward. But if you’re troubleshooting a helpdesk ticket, using social to reach out to someone with more experience might be the most efficient use of your time. Social features allow you to reach out and get the information you need far more quickly than if you emailed one individual or went looking through a knowledge archive, which tend to become difficult to maintain and update.
It’s okay to start small and try gaining small benefits from social rather than starting with a broad implementation across the whole enterprise. Many organizations start with a pilot group and let them find ways to apply social to their everyday work. Another starting point is to replace the age-old CEO blog with a social newsfeed, which shows the executives are committed to using social communication.

Selecting the best method for testing social depends on your circumstances. In some cases, people might want to try implementing an on-premises social platform within an established system, such as a help desk system or document management collaboration system. If a company collaborates frequently with external sources, it might start with an online system that accommodates a variety of working styles with customers, vendors or business partners.

Your five best tips for enterprise social:

Step 1: Set goals that can be measured.

Yes, we’re talking about a bunch of humans using technology to be “social,” and you need to measure their interaction. What’s the beginning state? If teams are already using social systems, what is the percentage of use? Your entire company may be automatically signed up to access your intranet, but how often do they visit? How long do they stay? How much do they post to newsfeeds? How much do they “like” and/or “reply.” These metrics will lead to the measurement of desired outcomes — more products, more overall engagement between employees and increased productivity.

_TIP: Launch an employee survey before your new intranet is launched at six months and a year with questions aligned to the goals of the social intranet._

Step 2: Stack the deck in your favor.

Imagine watching your children start to stand by pulling up on ottomans, tables or whatever is in front of them — standing comes before walking. Using the same logic, identify early adopters to the features you’re going to develop and start with those hand-picked groups. Not all social intranet pilots will work, so keep picking groups that are ready to collaborate and use new tools. When a group finally does adopt the features, you have just created an example of the values and metrics you created in Step 1, to which others throughout your organization can refer.

_TIP: Start with a small subset of features to focus on the communication and roll-out._
Step 3: Who’s who and what are they good at.

Technology is not social; people are. To that end, to make a social intranet “social,” you must create a structure around the people within your organization. Whether you’re using one productivity ecosystem or a combination, be sure to select a single source of your employees’ personal profile information. The profile not only houses an image, birth date and interests, but it also provides key attributes of an employee’s expertise.

**TIP:** Create a contest where different departments, divisions and/or teams compete against each other to have the most profiles completed.

Step 4: Nurture growth through “community managers.”

No child can learn to walk without the help of people around her/him. A social intranet is no different. You’ve already committed to gathering metrics over the long term; now it’s time to make sure the right people are in position to nurture (pun intended) the solution. Create a group of community managers and power users who can be the human representation of the technology you’re using.

Combine these baby steps with the amazing new technologies that are arriving in the market place, and you will be able to change the culture of your organization.

Step 5: Repeat and evolve.

If you find something that works, keep doing it. Once you get the basic functions working, progress to more advanced interactions and getting the absolute most for your investment in social technology.

**TIP:** Social technologies are built around rapidly changing human interactions, so be ready to change your rules and your approach.
Getting The Most From Mobile

Along with social networking, mobile has revolutionized and become an integral part of the consumer digital experience. There are hundreds of thousands of apps available for iOS, not even taking into account Android and other mobile operating systems, and users download billions of apps each year. People use mobile devices to communicate with friends, take and share photos and videos, play games, book flights, and manage their bank accounts — and that's just a tiny fraction of the uses. With that level of ubiquity in the consumer space, it's no surprise that people have come to expect the same functionality when they go to work. Businesses that put well-designed mobile solutions in place can increase efficiency and productivity.

The best path to success when considering and implementing an enterprise mobile solution is to start with a specific need and work backward. Look for specific use cases that are crying out for a mobile solution. Sales teams are often a good place to start, because they're constantly in the field. A mobile app could, for example, improve their responsiveness to customers by pushing out the most recent sales materials, or alerting them to new product lines or price changes.

Just as with consumer apps, mobile enterprise tools start with the design constraint of the small screen and touch interface of whatever mobile device or devices will be used. That constraint means good mobile apps don't try to do 50 different things. Rather, they do a very small number of things really well. That's one reason there are so many apps available. The “appification” of public-facing websites meant taking sites that were crammed with content and layers of menus and forms and boiling them down to their essential purpose for the small screen. Sometimes that means breaking up one massive site into mobile components that serve very specific purposes. The same goes for enterprise mobile.
Don't fall into the trap of trying to replicate an entire enterprise collaboration platform for a mobile device. People aren't going to sit down and write entire proposals on an iPad, so find ways where mobile will be truly useful. Say a company has discovered that there's a bottleneck in the workflow of producing whitepapers because they have to be approved by managers who are often out of the office. An app could solve this problem by giving them a way to review and approve documents while on the go. The app shouldn't make the managers tap through multiple screens and cross reference emails just to make that decision. If all the information is presented in one place, they can easily review it and decide whether to approve a document or send it back for revisions, eliminating the bottleneck in the workflow and improving productivity.

Smartphones now have a lot of built-in capabilities that can have interesting business uses, including — but not limited to — accelerometers, fingerprint scanners and GPS chips. Or consider the humble camera. A construction company that has a workflow involving taking and filing pictures of completed projects could create a way to complete a SharePoint Online form from a mobile device, so workers could take the photo and file it in the workflow from the field instead of having to go to a computer.

There are clearly some great opportunities to improve the enterprise, but mobile design is challenging, and custom app development, while sometimes worthwhile, is also expensive. One solution for companies that don't want to go down that road is to consider cloud-based Software as a Service (SaaS) solutions, such as Office 365. Office 365 has mobile ready out-of-the-box, and the company can let the vendor worry about optimizing the interface for small screens and making sure the product is compatible with a variety of platforms.

When implementing mobile tools, the main challenge is providing a consistent user experience across all of the devices and operating systems used by employees. While some mobile functionality is quite straightforward, such as accessing and using work email from a smartphone, companies need to bring mobile to all the other collaborative tasks, such as accessing content and communicating with colleagues in ways that are more effective than sending an email.

Another obstacle to implementing this technology is being able to prioritize other use cases for mobile in your organization. While it might seem like a good idea to open up all of your systems for mobile access, that's likely to introduce a whole new set of issues and security concerns. With your legacy systems, various security measures have been developed and introduced over time. If you suddenly throw open the doors to mobile access, you won't have a secure environment for collaboration.
That’s why it’s important to prioritize the aspects of your infrastructure that you want to take mobile, and take steps to ensure that any new content or sites the company develops start with a mobile-first perspective, assuming that people will access that site via phone or tablet.

For both small and large organizations, the most common approach to mobile is to adapt to the realities of a bring-your-own-device (BYOD) environment. Many companies use third-party solutions that help enable BYOD and make these devices more secure from a software perspective. In most situations, trying to control what devices employees use turns out to be neither realistic nor worth the time.

A great way to begin implementing mobile-first design is to start fresh with a new initiative or solution upgrade and learn as you go, rather than trying to revamp a complex existing project.

Also, make sure to start with projects that are ideal for mobile. Prioritize the use cases that make the most sense and stand to offer the best return. You probably don’t need to start implementing mobile by enabling mobile applications for internal finance reports, for example. But your sales force may already have specific needs that could be addressed by mobile technology, with a significant impact for the company.

**Your five best tips for mobile:**

1. Take an inventory of what devices your employees already use. This helps you determine which types of mobile solutions to implement first.

2. Survey users to understand priority use cases. Find out how users want to use mobile devices for work and if they have specific needs that must be met.

3. Select a new initiative from the priority use cases and apply a “mobile-first” design approach.

4. Initiate a pilot program. Make sure to provide feedback mechanisms for users and observe them in the field, taking note of user behaviors and workarounds.

5. Use findings from the pilot program to build momentum for the broader rollout. Talk internally about what you’ve discovered, and look for other groups in the company that could also apply to these mobile solutions.
Improving And Automating Workflows

Workflows can be complex endeavors and can be found across functional areas like finance, marketing, sales or IT. Problems often arise when a short-term workaround becomes a long-term “solution,” or just happens when nobody’s taken the time to sit down and create a thought-out workflow. Workflow problems can slow down or derail processes from onboarding new employees to generating sales leads.

The main challenge companies face when automating workflows is that they’re often poorly documented, which results in employees following certain practices over time without much thought about whether they make sense. While there are tools that would help to automate many processes, the cost and effort of implementing them may prevent organizations from taking such a step. Instead, people cobble together their own workarounds without understanding the opportunity for automation.

Typically, companies try to automate their workflows by introducing email notifications. For example, when a person in one department completes a form, it may trigger an email notification to another person in the workflow. Unfortunately, this common approach creates a lot of additional email while still requiring the user to go to a separate system in order to take the next action, and these extra steps tend to cancel out the hoped productivity gains.

To achieve success, start by looking for ways to streamline or eliminate steps before trying to automate a process. Are all the steps necessary? Does your process really require as many approvals? Doing the process audit up front improves the effectiveness of your automated workflows, but many companies skip this step.

You may have what seems to be an overwhelming number of processes that could use automation. How do you prioritize? Make sure to focus automation around effort, cost and impact. Where would automation have the greatest impact for the least cost? A lot of companies set out to document all their workflows and get overwhelmed. Prioritizing helps you decide where to focus your efforts.

Your five best tips for automating workflows:

1. Take inventory of current workflows and document the processes at a high level.
2. Determine which processes could be reengineered or entirely eliminated.
3. Prioritize the remaining workflows based on their importance, impact and the estimated cost to automate them.
4. Determine which solution would be appropriate for automating the workflows, with preference given to solutions and platforms you already know and use internally, such as your CRM system, CMS platform or SharePoint Online. Familiar tools minimize the effort.

5. Structure and implement a pilot program. Gather feedback and observe user behavior to test your assumptions about automation.

**Information Design For Browsing And Searching**

Imagine a library that had no system for filing its books, no card catalogs and no computers for searching its inventory. It would be virtually useless for anyone looking for any specific book or topic. This is the importance of having good taxonomy and metadata ingrained in information design, and it’s just as important in the digital workplace.

Problems with information design usually manifest in two fundamental ways, both related to findability. The first is that users can’t find what they need when using search. Users are accustomed to Google, and can quickly become frustrated searching for information they know is in the system and not being returned in the results. The second is that users can't find the information they want by browsing. They get to a site and the navigation isn’t intuitive, or they end up on a page that doesn't have information that helps them get closer to what they’re trying to find.

The ability to find information via both searching and browsing are both critical. Some users are searchers, some are browsers, and the digital workplace has to accommodate both so they can access the content they need to be productive. The question then becomes how to store content in a way that it can be easily retrieved later on, and that's where taxonomy and metadata come in.

**Taxonomy And Browsing**

Taxonomy is just a fancy word for classifying and organizing information in a systematic way. People tend to do a great job of this at an individual level. They have folders organized a certain way on their computer so they know where to look. But someone else who tried to jump into their file system and find a particular document would be stumped. At the enterprise level, information should be organized in a way that is logical to users as a whole. That taxonomy will generally be mirrored in the site navigation, so a good taxonomy means users will be able to easily find the content they need.
There are a number of different schemes that can be used to classify information. Using the company’s organizational structure as the base for the taxonomy is usually fairly straightforward, and users will come to the table with a decent understanding of how the information is organized. Using a scheme that classifies information based on which functions it’s related to is also fairly straightforward, and a common approach.

Whichever model you choose, a great start to any information design project is a card-sorting exercise, which is an old brainstorming technique that’s great for modern classification. Put together a stack of index cards, each representing a document that might be in the system. Then you should have users from a broad cross-section of the organization decide where they belong among various “buckets,” depending on their properties. Those buckets in turn become the taxonomy.

**Metadata And Search**

Enterprise search is able to search through the full text of documents, but it’s not very good at contextualizing that information. Google is working with a large dataset and extremely sophisticated algorithms to contextualize information and guess what users are actually looking for. Enterprise search tools don’t have these advantages, so enterprise information management solutions need to add context in different ways. Metadata, or data about the data, helps enterprise search return better results by providing that context.

Metadata for a document could include information based on the document’s place in the taxonomy, such as department of origin. But it also allows for much more granular information, such as language, author and version, which results in more effective searching than would be available through the taxonomy information and full-text searching on their own.

One exciting development is the intersection of taxonomy and metadata to create enterprise browsing experience like what users might expect from Amazon. Many companies are moving from legacy file-share systems, where every file has a single home in a system folder, to solutions like Office 365. For instance, if the file structure went year/department/office location, those attributes could be flattened out into metadata for each document. Now a user can browse for a document like they’d shop for a TV. They could drill down to show documents from 2012 that belong to the HR department and originated from the Houston office, for example. Many users have come to expect that type of experience whether they’re shopping or working.
Defining classification is one of the hardest challenges in developing an information/document management platform. People fundamentally have a hard time agreeing on classification labels. We all come from different backgrounds and have strong personal inclinations toward term preferences. There are also many different levels in which an organization needs to determine classification.

First, many organizations need to determine global classification that can assist in overall classification to support search, refiners and navigation. This can be very challenging mainly because we are looking for broad classification concepts that do not sacrifice detail.

Second, there’s the need to define classification per business unit or division. This classification can be more specific and can assist in organizing and defining ways to sort/filter/store information pertaining to a function or subject matter.

Third, organizations must define classification for specific business processes or document management processes. With this level of classification, it is much easier to define terms and values because they are representing a process that has been defined. Don’t be afraid of modifying the process in order to improve usability or leverage features and functions of technology that can expedite publishing and approval.

Everyone ultimately feels comfortable defining classification and taxonomy. We are all experts in what our companies do. However, the classification that a single individual creates may not be intuitive to a larger audience. Typically, we recommend that a cross section of users close to the content participate in creating the classification schema. It’s the experience and perceptions of many that help to create a classification schema that will be intuitive to the lowest common denominator between each user. A group can also contextualize and negotiate terms and come to a consensus on the best direction for the company.

Many organizations tend to assign taxonomy and classification creation to one single person. This person is supposed to subjectively design the terms and hierarchies. However, in the review process to gain buy-in from other members of the user community, a company will ultimately spend as much time in the design creation process as if it had originally solicited a committee to do the work together.
Your five best tips to create the right information design for your company:

1. The taxonomy will never be completely finished.

2. Continually review the taxonomy and search terms to evaluate if your taxonomy is still effective for your business.

3. Avoid the square peg/round hole problem with pre-determined metadata values. If users cannot find a term that naturally aligns with their content, then they will tag it with something less meaningful, therefore diluting the quality of the tags.

4. Getting a starter taxonomy together is good enough. A starter taxonomy is one that defines the high level information architecture for an information management platform. Additional detail will come with time. Many projects have been delayed due to lack of consensus on the taxonomy.

5. Auto-classification is a great solution for tagging and reduces the risk of subjective tagging, which dilutes the quality of browsing and searching.

How Can Branding And Design Improve User Experience?

One of the strengths of many enterprise tools is their capacity for customization to fit an organization’s specific needs. This includes the ability to reflect a company’s branding through a customized design, with the goal of providing a great user experience.

However, this isn’t necessarily as straightforward as it might seem at first. There are two common mistakes companies make when branding their site. The first is to think it’s as easy as slapping the company logo on what is otherwise basically a stock implementation and considering the branding work to be done. At the other end of the spectrum, it’s also a mistake to over-engineer a collaboration environment to try to recreate the experience of a public website. There’s no one-size-fits-all approach to branding and user experience, but the best path is usually somewhere in the middle.
Branding And The Importance Of Perception

When thinking of branding, don’t just think of applying a color scheme and adding a logo. Brand is everything that reflects the personality of your organization, from your logo to the voice of your content to your design. It’s what you’re trying to project not only to customers, but within the organization as well.

If a company is trying to send the message to employees and customers, for example, that it’s modern and forward-thinking, having outdated furniture will hurt that effort. Similarly, if you have a modern approach to collaboration and put in the work to have great workflows and information design in the collaboration platform, but then have an outdated design, there’s a disconnect between the company culture, the company brand and that tool. That would definitely hurt the user experience and hinder adoption, because the experience would feel alien to what people have come to expect in that company. Branding can be the minority of the work, but it’s often a majority of what people perceive.

User Research For User Experience

Providing a great user experience goes beyond branding. One of the best ways to improve the user experience is to incorporate user research into the design. The project will be driven by top-level business objectives, of course, but user research is the best way to find the gap between how stakeholders think users do their work and how users actually do their work. That gap is often where there are a lot of design opportunities.

User research has an undeserved reputation for being a big, costly undertaking. A small amount of informal research is better than none. It can be as simple as identifying some candidate users within different areas of the company working in different roles and sitting down with them to talk about how they do their work and, ideally, observing them working.

This is the best way to find out if people are, for example, turning to email for document collaboration because of something they don’t like about the way their intranet does document management, or keeping a personal contact list on their desktop because the corporate directory is confusing.
One liability of user research is it can be understood by management as an indication that their insights and goals are being ignored. In fact, though, research often proves to validate the initial assumptions. It’s cheap to ask questions. It’s expensive to design solutions based on incorrect assumptions about how we think people work and find out later that we’re wrong. Intentional, small-scale user research at the beginning of a project doesn’t have to be expensive, and it can have a big benefit for the quality of the end product.

One of the main problems companies face when creating a brand identity is equivocating brand identity with a logo and colors. A brand identity should be understood as the way a person or organization is perceived by their customers. It should influence the tone of their content, their selection of photography and go all the way down to the people they hire. The logo and branding guidelines should serve to represent and reinforce that identity, but it shouldn’t be mistaken for it. If you want to truly understand your brand, first ask “How do I want to be perceived?” Then, interview your customers and users to find out how you truly are perceived. Closing that gap will take more than new fonts and colors.

To thine own self be true — know who you are and how you want to be perceived before deciding on the minutiae of “which shade of warm gray should I choose.” If you have an existing brand, honor it. Make sure that the same adjectives that you’d use to describe your company could be applied to your design choices, tone of copy and photography.

**Your five best tips for creating a brand identity:**

1. Avoid ad-hoc decisions: Ensure that design decisions reinforce your pre-defined brand attributes. If you’re not sure what attributes you’re trying to satisfy, work through Microsoft’s product reaction cards with key stakeholders to help you define the end game.

2. Learn what makes good design instead of assuming you have “an eye.” A good starting place would be to familiarize yourself with the Gestalt principles. These are psychological principles that describe how users perceive and organize visual and auditory data.

3. Don’t design by committee. Ensure you know the needs and requirements of stakeholders. During a review, instead of asking them to choose between two options, lead a dialogue and ask them to explain which design decisions best satisfy their pre-defined requirements.
4. Utilize the Pareto principle to make the most of your and your stakeholders’ time: 80% of a design’s impact will be dictated by 20% of the design decisions you make. This means you can probably stop scrutinizing over the right margin of the supplementary nav.

5. Empathize: Ultimately it’s your USERS’ experience that matters, not your personal preference. Familiarize yourself with principles of user-centered design to break out of the rut of “gut reactions.”

How Can Governance Improve The Collaboration Environment?

Governance has been a hot topic of discussion in the world of enterprise collaboration for a long time. It’s still something companies often struggle with. Having in place the policies, structures and processes to ensure that the collaboration environment is sustainable and meeting the organization’s needs can be the difference between a productive, thriving digital workplace and one that’s bogged down in a morass of hard-to-find content and overwhelmed systems.

Content sprawl is the most prevalent symptom of governance problems. Users are able to get into Office 365 and add documents or perhaps even site collections or lists, but they lose sight of the technical limitations of the platform. Lists can become so large that the list view threshold has to be increased, which in turn can place extra demand on servers. Or people will create and abandon sites, and nobody will know who owns them or what purpose they served. This can be especially problematic for on-premises solutions, but it’s less than ideal in cloud-based solutions, too.

Fortunately, some relatively simple tactics can be used to curb content sprawl. The exact approach used will depend on a company’s culture, which will influence how loose or tight the governance model should be. In any case, the place to begin is with the business needs. Identify these needs and then set up the technical needs to support this initiative. There’s a lot of good guidance out there for how to choose database sizes or how big a site collection can get before it’s archived, along with many other parameters that can help when putting together a strategy for farm maintenance. None of it is rocket science; you just have to talk about it and be vigilant about monitoring the farm.
Once the more technically oriented policies have been outlined, it's time to look at policies around usage. One popular model is adopting Office 365 as a way to decentralize content management, meaning business managers in different units would be ultimately responsible for their content and sites, with minimal support from IT. It sounds good, but in reality it often doesn't work. Collaboration, social and mobile tools all need a champion in the organization, and it's difficult to find a champion from every department, which means the decentralized model often ends up leading to a lack of fresh and engaging content. Ideally, there will be a partnership between IT and the business to define usage policies and provide administrative support.

Security is also an important factor when considering governance. A security approach that is open and simple will make the system easier to maintain and encourage more collaboration. When working on governance, the organization has to decide how the information can be as open as possible while still keeping critical business functions under lock and key.

But an open system isn't something IT can just roll out and say “if we build it, they will come.” That's a recipe for content sprawl. Be careful about what users demand the freedom to do. Don't allow every user to create a site or new libraries. Delegate that type of responsibility very carefully to people who have been trained and understand where and why they build new sites and libraries. Creating site templates can help IT to quickly issue new sites without sacrificing consistency in navigation and metadata. It's also a good idea to audit content that hasn't been touched in a long time, such as three years, to look for outdated or redundant pieces that should be eliminated or consolidated.

Having a good governance strategy takes some thought and work, including an ongoing effort to make sure policies are being followed and updated if necessary. Fortunately, there are some tools to help ease the administrative burden of maintaining good governance, like Metalogix ControlPoint and Sharegate. These can help out both on the IT side of governance and the user side of governance, providing tools that improve security, and introducing audit capabilities for monitoring size and usage information.

The key is to remember that governance has to be realistic and has to align with job responsibilities in many cases. Creating idealized governance or governance that is too restrictive does not allow a company to leverage the full potential and value of its investment in Office 365. Governance is also never complete. It should be iterative and revisited, and modified to reflect the changing needs of the organization. As a new business objective starts to leverage SharePoint Online sites, the governance plan should be altered to accommodate that use case.
Also, if social is introduced to SharePoint Online sites, figure out what the impact will be to the governance plan and modify as appropriate.

Every organization has a different culture and tolerance for leveraging Office 365 in its business. While certain areas of a plan can be templated, some decisions about creation, management, archival, deletion and information compliance need to be tailored to the business mission.

**Your five best tips for improving governance:**

1. Keep it simple!
2. There should be a purpose to the sites, and that’s what the focus of the governance plan should be.
3. Automate governance wherever possible. Create ways to enforce governance in the creation/deletion/archival.
4. Make governance online. A governance plan often gets created as a 50-page document that eventually gets shelved. Create a site with your governance processes and policies that make it easy to access and to understand.
5. Promote continual training/education and gatekeepers for business units using SharePoint Online. If it's a part of someone's job to manage a site collection, make sure they take regular training to refresh on policies and processes.

**Change Management And User Adoption**

The adoption of new technology within enterprises has historically been a challenge. It isn't unique to the digital workplace or tools like enterprise collaboration systems. Successfully introducing more complexity or a new way of working into people's lives will require some effort, regardless of the specific technology.

Organizations make a mistake when they see the way users adopt consumer tools and think that by dropping in social enterprise tools the company will have an enterprise version of Facebook and mass adoption will ensue. Unfortunately, it's not that simple. Even if you have the best set of tools on the market and the best strategy to make them fit your organization’s exact needs, you can't ignore the change management issues.
Successful change management and good user adoption of a new system starts with realizing that there’s a process for change management, and that approaching it in a mindful and intentional way can improve results. The first step is putting the technical implementation in the proper business context, tied to a strategy and infused with the proper sense of urgency. Without this users will not know why they should care.

The first question users will have during any kind of transition is what they get out of it. In order to address this, try to build a case for the tool or system from the beginning of the implementation process. These means involving some group of users from the start to build a coalition and tweak the solution to more exactly meet their needs. This often takes the form of a pilot program, where the new tool is rolled out first to a specific division or group. It's a good test bed, and has the added bonus of creating a group of users who appreciate the tool and know how to use it effectively. They'll act as champions and guides for the tool when it is provided to a wider audience. At the same time, don’t overdo it. A pilot program shouldn’t take a year, and testing that drags on and creates project bloat is a symptom of poor change management.

User adoption will be best when a tool solves a specific need. Define a user experience and use case, such as building an extranet to collaborate with clients. There’s an easily identifiable issue: lackluster communication with clients. The upside of solving it is pretty clear — improving communication with customers will improve customer satisfaction. So put the tool in place for a specific client or project and establish some metrics for success, such as response times. If the project works, use those metrics to demonstrate the value of the tool to a broader group of users, rather than just assuring them that the tool has value.

Try to make the new tool as frictionless as possible. For example, for a SharePoint Online solution consider the process of implementing a formalized information design that incorporates taxonomy and metadata. People who were comfortable with their folders now have to tag documents, and tagging documents can feel tedious. But user adoption is vital — if users aren't tagging and storing documents appropriately then findability will suffer along with usability. Although there are no strict rules, it's best to stick to requiring users to fill out no more than three to five metadata fields for any given document. Automatic classification tools that suggest metadata based on a scan of documents can ease some of this burden on users, and also provide some of the consistency necessary for great findability.
Taking a company’s culture into account is also a good idea when crafting a change management strategy. Many technical solutions require having a process in place and the discipline to adhere to it. If an organization doesn't have much maturity around project management, injecting a great task management tool into that environment isn't likely to make much impact. It's not necessary for every user to be at a high level of maturity for these tools to work, but it’s important to understand whether the organization and its culture are ready.

One of the biggest challenges is creating a sense of urgency for an internal initiative or technology implementation. To get employees on board, they need to understand why a certain initiative is being undertaken. Too often, changes are thrust upon them without a business case that establishes the overall context, leading employees to push back and resist the change.

Another problem is not building user feedback into the change management process. Without feedback mechanisms in place, companies don't gain a good understanding of how changes are being received and pass over issues that end up adversely affecting user adoption later on.

Most companies look at change management as a training issue: They have a new solution and need to make sure people know how to use it. Execution is obviously important; some communication, effort and materials should be more solution-focused, so that employees understand why they are using the solution in a certain way.

From the beginning of project brainstorming to completion, it’s important to figure out how to engage users, and keep representative users involved going forward. User involvement, feedback mechanisms, piloting, testing and learning before you roll out to the whole organization are all good ways to help companies achieve their goals.

Whether you’re rolling out a corporate intranet or a whole new CRM system, the same change management principles are going to apply across the board. Instead of developing a different approach for each project, it makes sense to be consistent and reuse the methods that work.
Your five best tips for using change management to improve your organization:

1. Don’t focus on training alone — focus on change management principles and practices.
2. Engage users throughout the process.
3. Identify and support potential “evangelists” for new projects and initiatives.
4. Develop a communication plan as part of your implementation roadmap.
5. Create a sense of urgency. Give your employees positive reasons for embracing change.

Now How Do You Get Started?

Below is a process we have identified that draws heavily from our own experience implementing custom collaboration and content management solutions on the Microsoft Office 365 and SharePoint platforms, as well as principles found in design thinking and user-centered design.

The conversation should always start with customers and employees, not features and functions. When you start with features and functions, you never properly establish context and therefore do not define the problem. For example, the appropriate question to ask is not “Should we implement social?”, it’s more about “How can social impact our customer experience?” It’s all about asking the right questions.

With that in mind, here are the five steps you need to create the digital workplace:

1. **Clarify the context:** Identify your customer experience, as this is the starting point for establishing the proper context for everything else that follows. Keep in mind that this is not intended to be a long, drawn-out exercise, but should be used to extract the key principles that can be clearly communicated, understood and followed!

2. **Focus on users:** Understand roles, functions, behaviors and impediments by asking the right questions and observing actual behaviors. Determine information needs and how they differ throughout a particular process — address both “knowing” and “doing.”
3. **Spec out a game plan:** Develop a roadmap that lays out the implementation plan that describes the overall approach and budgetary requirements. This is both the business case as well as the game plan that can be used to gain executive buy-in for funding of the project. This should also include change management components and communication strategy.

4. **Experiment/measure/learn:** Your roadmap will outline your plan for piloting your ideas, measuring response/behaviors and the process for applying what you learn. At this stage you are actively managing your pilot(s), reporting findings back to stakeholders and refining your roadmap.

5. **Rollout and support:** Once you have incorporated employee feedback and made refinements you are ready to launch company-wide. Since the scale of this effort will differ dramatically from the pilot program, you need to develop a rollout and communications plan and support model that provides adequate user support during the critical initial launch period. It’s also important to implement a support model that includes both subject matter as well as technical resources and incorporates change management best practices.

So, this may seem like a lot of work, and you may be thinking, “Is it really worth it?” We believe that a well-thought-out game plan and the application of sound practices related to user-centered design, communication and change management can significantly diminish the challenges associated with moving toward the digital workplace. As to whether or not it’s worth it, we believe the question is really, “Can you afford not to?”

There are two forces at work that are driving the need for the digital workplace — rising expectations and intense competition. These forces are in play in both the “war for talent” and “battle for the customer.” Employees have much higher expectations in terms of overall work environment driven in part by their experience as consumers — and actively engaged employees are more productive and innovative. Rising customer expectations are nothing new and it’s easy to imagine the acceleration of demands for “easier, faster, better and cheaper” will continue in the future. With that in mind, the question that every executive needs to ask is, “Are we prepared for this?”

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