

Begin at Day-one or start now, mid-stream

# GOVERNANCE IN SHAREPOINT

# Governance Strategy

- ① Identify your executive sponsors
- ① Identify key stakeholders
- ① Outline the necessary personnel
- ① Quantify the required infrastructure
- ① Establish usage policies and best practices
- ① Outline your taxonomy
- ① Decide on your site creation policy
- ① Develop your look and feel

# Governance Defined

- What is it in our context?

“Governance relates to decisions that define expectations, grant power and control, consistent management, cohesive policies, processes and decision-rights for a given area of responsibility. It defines and should document the model for the strategy of all this and perhaps more”

# Governance Strategy

## ◎ Identify your executive sponsors

Identify key stakeholders throughout the organization who are willing to provide strategic direction.

This should always be the first step in proscribing your enterprise SharePoint Governance Model. If you don't have the support from the top, the commitment to the cost of an apparent overhead process, the task will spiral into failure.

The executive sponsors must accept the cost benefit of Governance best practices. It is the task of the Governance Czar (engagement manager) to convince and to maintain the confidence there **MUST** be Governance.

# Governance Strategy

- ① Identify your executive sponsors
- ② Identify key stakeholders

It's great to find support within each business division or product group, but at the bare minimum you need to identify key business decision-makers and include them in the process.

# Governance Strategy

- ① Identify your executive sponsors
- ① Identify key stakeholders
- ① Outline the necessary personnel

Outline the necessary personnel to run the envisioned infrastructure to properly support the system. This step may be juxtaposed with the next step of quantifying the hardware and software. They are married in actuality but since personnel will generally have a higher and longer lasting cost I put it first.

# Governance Strategy

- ① Identify your executive sponsors
- ① Identify key stakeholders
- ① Outline the necessary personnel
- ① Quantify the required infrastructure

Outline the necessary infrastructure to properly support the system. This involves identifying the existing hardware and software that can be used and the planning and sizing of new acquisitions for budgeting purposes.

# Governance Strategy

- Identify your executive sponsors
- Identify key stakeholders
- Outline the necessary personnel
- Quantify the required infrastructure
- **Establish usage policies and best practices**

Establish usage policies and best practices for SharePoint vs. file shares vs. other ECM platforms that may be in place. Within SharePoint, establish usage policies around MySites vs. TeamSites.

# Governance Strategy

- Identify your executive sponsors
- Identify key stakeholders
- Outline the necessary personnel
- Quantify the required infrastructure
- Establish usage policies and best practices
- Outline your taxonomy

Outline your taxonomy. Again - this may be your business units, along product lines, or by major projects. Different companies have different models. This will play into your site creation policies.

# Governance Strategy

- Identify your executive sponsors
- Identify key stakeholders
- Outline the necessary personnel

● Decide on your site creation policy. Is the system wide open, (hey, that's what got you into this mess in the first place!) do you restrict people to specific parts of the taxonomy (by security group), or do you set up an online request form to be managed by a single group (such as IT)?

- Decide on your site creation policy

# Governance Strategy

- Identify your executive sponsors
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- Outline the necessary personnel
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- Establish usage policies and best

Develop your look and feel. Are the out-of-the-box SharePoint templates acceptable, or do you need to create custom site templates for each division/product area/project team?

- Develop your look and feel

# Governance Strategy Summary

- Identify key stakeholders throughout the organization who are willing to provide strategic direction. It's great to find support within each business division or product group, but at the bare minimum you need to identify key business decision-makers and include them in the process.
- Outline the necessary personnel and infrastructure to properly support the system.
- Establish usage policies and best practices for SharePoint vs. file shares vs. other ECM platforms that may be in place. Within SharePoint, establish usage policies around MySites vs. TeamSites.
- Outline your taxonomy. Again - this may be your business units, along product lines, or by major projects. Different companies have different models. This will play into your site creation policies.
- Decide on your site creation policy. Is the system wide open, (hey, that's what got you into this mess in the first place!) do you restrict people to specific parts of the taxonomy (by security group), or do you set up an online request form to be managed by a single group (such as IT)?
- Develop your look and feel. Are the out-of-the-box SharePoint templates acceptable, or do you need to create custom site templates for each division/product area/project team?

# Potential SharePoint Governance Areas

- Topology
- Maintenance
- External Access
- Extranet Access
- Taxonomy
- Content / Metadata
- Migration
- Backup / Restore
- Deployment
- Development
- Email
- Workflow
- Email
- Search / Indexing
- Reporting
- Security
- Active Directory

And the list goes on. Put your effort in this area now and it will pay off in the very near future

# Summary

- ***Plan your strategy:*** Regardless of where you are in your deployment, it is always best to go back and take the necessary steps to capture your company's governance model (or, to establish one).
- Be sure you have the support of the ultimate Stakeholders
- Use a checklist like the one presented here