HELPING YOUR NEW INTRANET REACH AIRSPEED VELOCITY
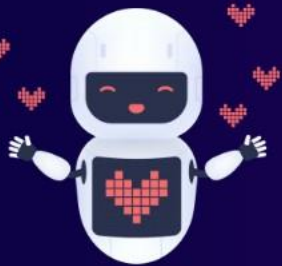
Sean P. McDonough

Senior Solution Architect and Consultant

Akumina, Inc.

365 Educon

PHOTOGRAPHY DURING THE SESSION

Feel free to capture the moment! Taking pictures of the presentation, during the session is perfectly fine.
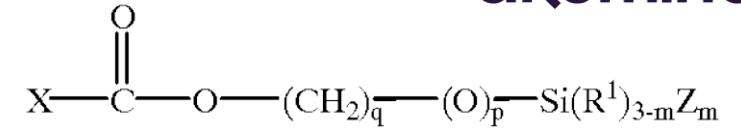
SELFIES WITH THE SPEAKER

We encourage interaction! If you'd like to take a selfie with the speaker, don't hesitate to ask. Most speakers will be happy to oblige during appropriate breaks.

RECORDING AND LIVE STREAMING

Recording or live streaming the session, in part or in full, is strictly prohibited. Thank you for respecting our content and Speakers.

A BIT ABOUT ME …

Started professional career as a polymer chemist for Procter & Gamble

- Transitioned within P&G to Information Systems

Developing software professionally since mid '90s

Focus has been primarily on SharePoint since 2004

Became a Microsoft MVP in 2016 (Office Apps & Services)

Nowadays, I work for Akumina, Inc.

- Senior Solution Architect and Consultant

Still have Bitstream Foundry going

- Good way to organize my professional activities
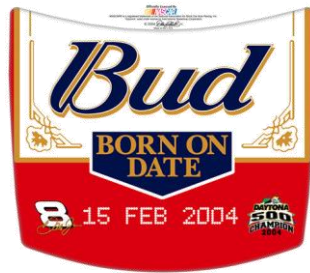- Educational and non-profit technical services

SESSION OVERVIEW

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CHECKLIST

- A bit about "born on" dates
- The creation of this session
- Before you leave
- On-time departure
- Making the most of the flight
- Safe landing
- Arriving at your destination
- Q&A throughout
- Wrap-up and contact info

A BIT ABOUT "BORN ON" DATES

A BIT ABOUT "BORN ON" DATES

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- This is Microsoft 365 (M365) and SharePoint Online (SPO)

- Microsoft refers to these services as "evergreen services."

- That carries some implications …

- Some of the information I'm going to share has a "shelf life."

A BIT ABOUT "BORN ON" DATES (CONTINUED)

Please don't look me up in five years and send me "fan mail" because I presented something that is no longer accurate due to a SharePoint (Online) service change. You may laugh, but it will happen has happened!

Dear Sean,

I was reviewing a presentation you put together five years ago, and I found elements that were incorrect. You are a horrible person and you should never touch SharePoint Online again.

Love you lots!

- an attendee

THE CREATION OF THIS SESSION

MOTIVATION

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I've been working with SharePoint for nearly two decades.

- I initially focused on SharePoint's public-facing capabilities.
- MCMS 2002 was rolled into SharePoint 2007 (MOSS 2007).
- Every SharePoint Online (SPO) tenant had a public site initially!
- I completely bought into the public-facing capabilities of SharePoint.
- Guess what – I backed the wrong horse. ☹

Since then, I've been doing a lot more work in the intranet space.

- Organizations keep wanting new intranets.
- I build primarily on SharePoint and Akumina.
- I have been involved in numerous implementations in the six+ years.
- "I've learned a lot in that time" is an understatement.

DEAD END

SESSION THEME/FORMAT

Building an intranet is (or rather, should be) a lot like taking a vacation.

- One potential point of contention with this analogy: your enjoyment level ☺
- Things to plan for and decisions to make before ever heading out.
- While in transit, you should make the most of your travel time.
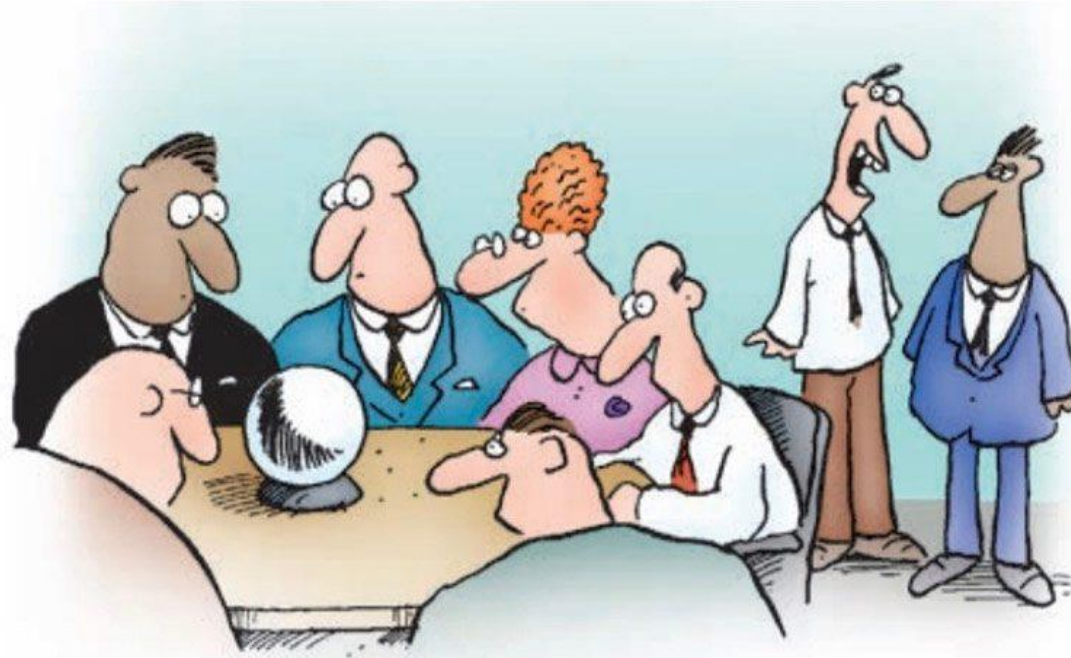- Upon arrival, you should have a strategy to see and do what you want.

PREPARING FOR THE TRIP

INITIAL THOUGHTS ON PLANNING

"...And this is our corporate planning group."

A COMMON INTRANET PROJECT

How many of you have lived through this cycle in some form?

- Get a mandate (and some budget) to build an intranet.
- Assemble your intranet implementation team.
- Put together a project plan.
- Analyze the existing intranet (if one exists).
  - Make a determination of what you'll keep, discard, or relocate.
  - Document new features/capabilities that must go into the release.
- Put together the wireframes (and *maybe* some functional specs).
- Build and/or implement the technological pieces.
  - Encounter the inevitable delays due to technology and other factors.
  - Just prior to release, let users play with what's being built.
- Turn it on, declare it's live, and then begin the "real fun" …

GENERAL 30,000 FOOT QUESTIONS

- Intended intranet purpose – why is it being constructed?

- How is your intranet currently used by your end-users?

- What functionality and/or content exists currently that must be included in the new intranet?

- How often is your intranet content updated? By how many people?

- What content functionality and capabilities will your intranet offer?

- Do you want to integrate your intranet with other business systems?

- What are you seeking to offer from a personalization perspective?

- Is there a desire to centralize one or more processes within the intranet?

- What do you want the intranet to look like?

- What sort of user experience and functionality will you include?
  - *Note: This is <u>not</u> the same as what your intranet will look like.*

ARE YOU CLASSIC OR MODERN?

By that question, I mean "how do you view corporate intranets?"

- Do you view them as a "nice to have" place for news and announcements? A place for (largely static) policies and procedures? A primarily read-only environment used by corporate communications? This is the traditional view of an intranet.

- Do you view intranets as places where people spend most of their time working, collaborating, and communicating? As digital workplaces? Work hubs used by everyone – not just corporate communications? This is a mindset that has grown in mindshare particularly among younger employees and digital natives.

Know who you are building an intranet for!

ROLES: BUILDING THE OPTIMAL TEAM
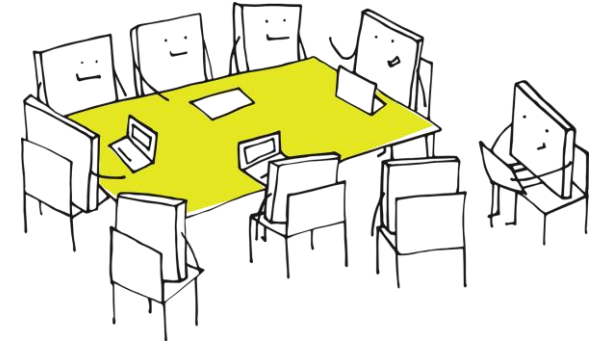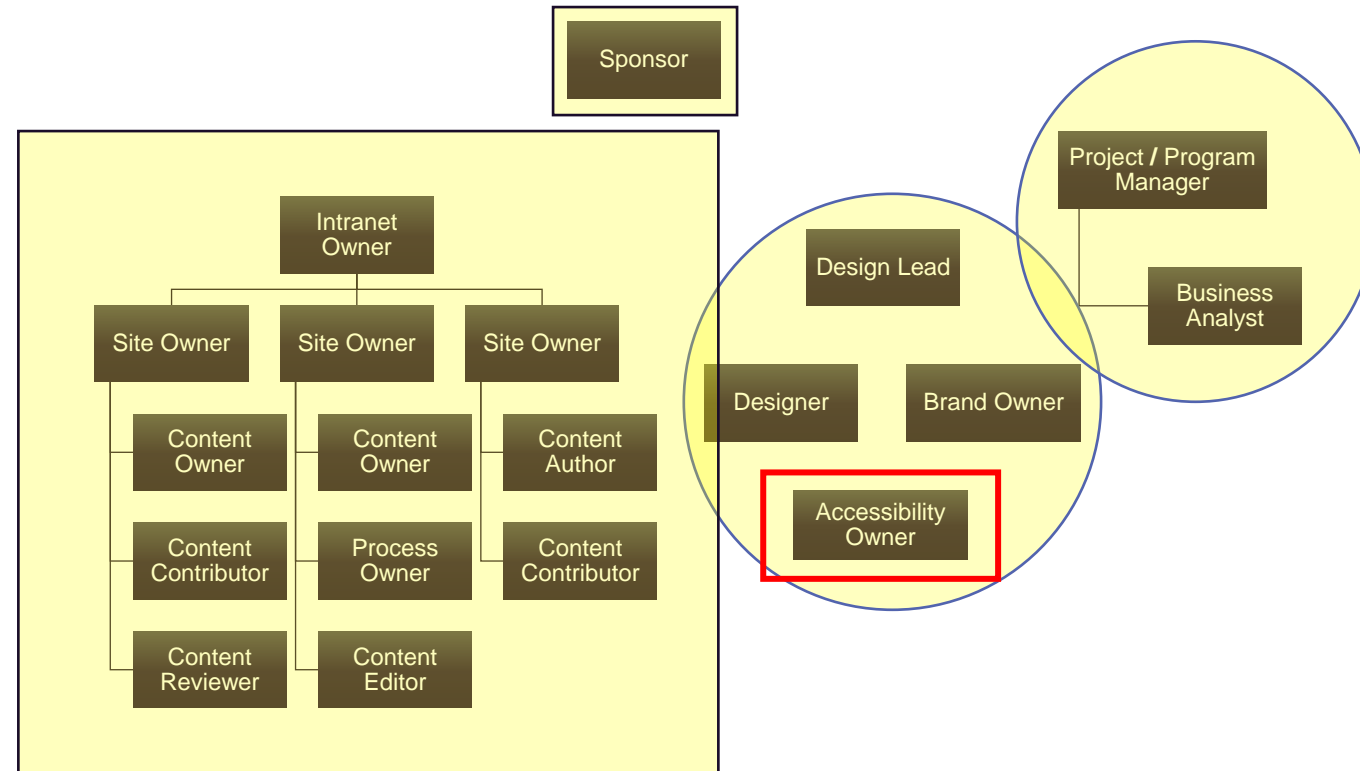
Team composition depends on many factors.
- The size of your organization.
- Your familiarity with the intranet platform.
- Whether you're building, using an intranet platform, or both.
- Whether you're working with outside consultants.
- The scope of requirements for the new intranet.
- The skill sets of those involved.

I tend to look at team composition through the following lens:
- Who are the content people?
- Who are the technical / platform people?
- Who are the "cat herders?"
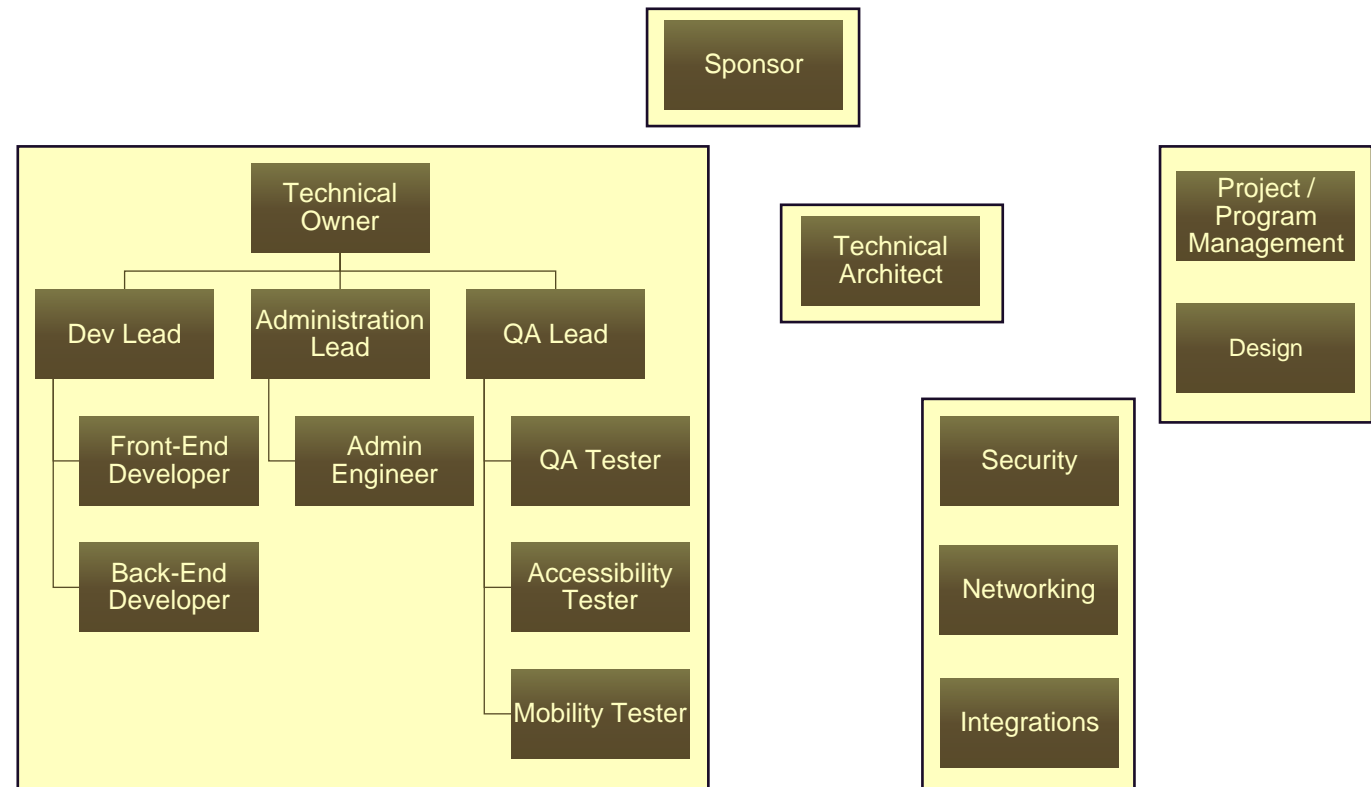- One or more people can be classified in multiple categories.

COMMON CONTENT-CENTERED ROLES

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- No two intranet implementations are the same, and the same is true for the teams building them.
- Every project has a sponsor or champion heading it up.
- Intranets typically have people responsible for content. No skill with the platform is typically assumed.
- Program and project management is needed both here and in the technical roles.
- Design tends to sit in between content and technical.
- Other content concerns (like accessibility) may involve SMEs.

Sponsor

Intranet Owner

Site Owner Site Owner Site Owner

Content Owner Content Owner Content Author

Content Contributor Process Owner Content Contributor

Content Reviewer Content Editor

Design Lead

Designer Brand Owner

Accessibility Owner

Project / Program Manager

Business Analyst

COMMON TECHNICAL ROLES

- We still have a project sponsor "leading the charge."
- Typically have the same project/program and design resources as on the content side.
- Technical Owner is oftentimes the counterpart and/or works hand-in-hand with the Intranet Owner.
- Technical Architect responsible for determining feasibility and providing technological guidance.
- SMEs may contribute in areas like security, networking, compliance, integration with other line-of-business systems, etc.

Sponsor

Technical Owner

Dev Lead | Administration Lead | QA Lead

Front-End Developer | Admin Engineer | QA Tester

Back-End Developer | | Accessibility Tester

Mobility Tester

Technical Architect

Project / Program Management

Design

Security

Networking

Integrations

STEERING THE SHIP

When choosing your team and how to run your project, experience has shown:

- Project velocity is inversely proportional to the number of people "issuing" requirements.

- The "design by committee" approach that some larger organizations are fond of becomes a very real source of contention, delay, inefficiency, and rework.

- The most efficient and effective projects I've worked on have been those where the requirements (content) and implementation (tech) sides have had singular champions empowered to make binding decisions, give direction, and build.

QUESTIONS AT THIS STAGE

- How will you run your project? Hopefully with Agile …

- How many environments will you need and have?

- Has the subject of migration been discussed (for intranet replacement projects)?

- Have DevOps been considered and addressed?

- Have you started thinking through a governance plan?

- Have you started planning for security?

- Do you have what you need to integrate additional systems?

- Do you have user stories and functional specifications?

- What are your plans for usage testing and acceptance?

- Have you started thinking about how you'll release?

THE RIGHT MINDSET

Recognize and acknowledge that building an intranet is *not* a prescriptive process.

Every intranet project I've worked on previously had started out with a set of target deliverables that underwent revision due to costs, complexities, and other factors that weren't known (or were in flux) at project inception.

At this stage of the game, flexibility and adaptability are highly desired team traits. This aligns with an Agile approach to delivery.

A SPECIAL WORD ABOUT IA

If you aren't familiar with the elements of SharePoint information architecture (IA), you absolutely must get acquainted during the planning phase (before implementation).

- Site Columns.
- Content Types.
- Managed Metadata and Term Sets.

It is exceptionally hard to "go back" and retrofit an IA structure onto a SharePoint site without impacting use.

What does IA afford you?

- Dramatically improved Search experience.
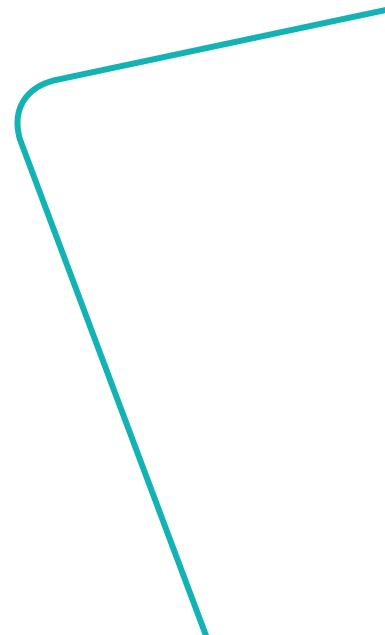- Processes and workflows can easily target documents of specific categories.

Just starting out? Visit the magnificent Sue Hanley's blog.

SUSAN HANLEY

MAKING THE MOST OF THE JOURNEY

"STARTING" YOUR JOURNEY

Everyone wants to start off right. Some advice:

- As mentioned, assume one or more requirements will change once development in underway.
- Use an agile methodology to effectively manage priorities.
- Have admins, developers, architect(s), QA resources, BA resources, etc., fully opt into an agile approach.

PMs: support your team and don't "throw them to the wolves" by agreeing to new features and changing targets.

- Violations of the "Space-Time Continuum" commonly happen with less experienced scrum masters and project managers.
- If a feature gets added, one of equal weight or development time needs to be moved to the backlog.
- It's tempting to promise "just one additional feature." Don't.
- Your development team will thank you. 😊

ENVIRONMENTAL CONCERNS
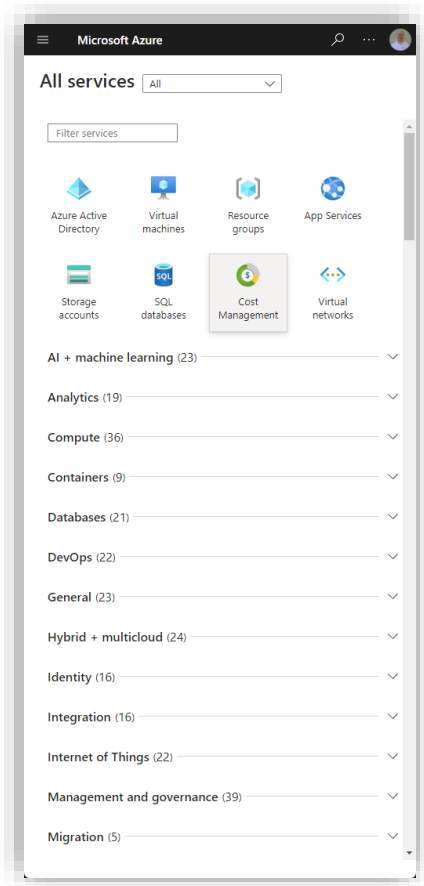
How many environments are needed for the project?

- Building in situ is not a recommended practice.
- Commonly, at least a production and development environment are used.
- Ideally, a prod, dev, test, and perhaps content authoring set of environments can be used.
- Your specific scenario will be dictated by existing corporate policy and the cost of maintaining multiple environments.

Accept limitations on the ability to synchronize environments.

- In my experience, environments can be brought to very similar levels of readiness and functionality, but chasing exact replicas is a fool's errand.
- Best to designate each environment's use and then make sure the key pieces for the intended use remain intact and are kept up-to-date.

MIGRATION FROM EXISTING INTRANETS

If you currently have a corporate intranet, it will probably be desirable to retain some of its content and/or functionality.

If you're staying on-premises, you shouldn't have significant concerns.

- Content can be migrated with ShareGate and similar migration tools.
- Other functionality may require re-compilation and/or refactoring, but the chances of getting it to work are decent.

If you're going to the cloud (e.g. SharePoint Online), you've got some additional decisions to make.

- Your content can be migrated as if you were staying on-premises.
- Server-side SharePoint code (i.e., full-trust solutions) will not migrate.
- You will need to redesign server-side functionality under SharePoint Cloud App Model.
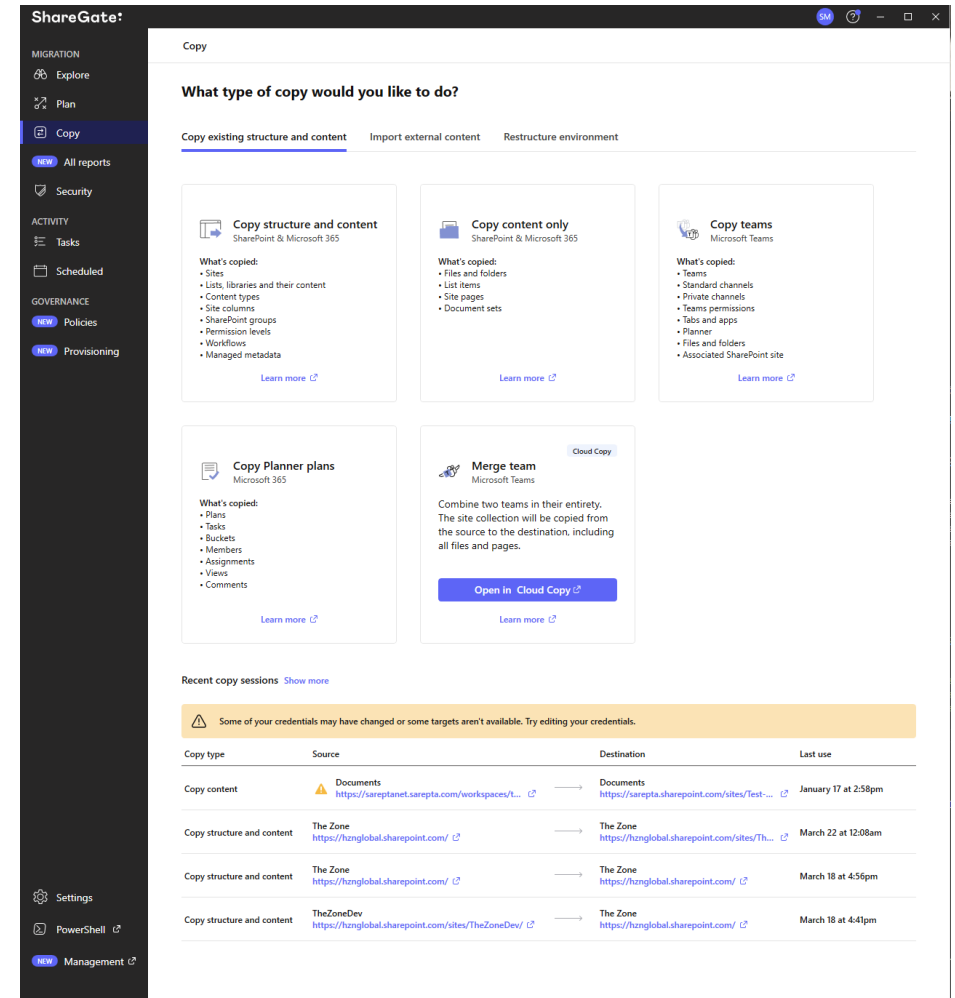
PUTTING SOME PROCESS IN PLACE

DevOps are something that the development team will likely have some input and preferences about for you to consider.

- We're talking about things like source control (commonly Git these days), continuous integration/continuous deployment (CI/CD), and other similar concerns.
- Source control is an absolute must to ensure that no development work is lost and elements can be rolled-back.
- The ability to leverage CI/CD will vary from platform to platform (e.g., SharePoint Online? A third-party framework? Cloud vs. on-prem?)

With SharePoint Online, Azure DevOps is often the easiest choice and fairly commonplace.

WHAT ABOUT GOVERNANCE?

Make sure you start thinking and planning for how you'll manage your intranet once it's built.

- It may be tempting to view governance as something you'll do later, but you really need to start planning prior to release.

- Once you release, you've opened Pandora's box.

You'll need a strategy for many scenarios. A few of the more common ones:

- How will new sites get created? Who can request them?
- Who needs to approve permissions changes? Who carries out those changes?
- What is your plan for old and expired content? Archive it? Delete it? When?

Third Party tools can help, but only so far. Effective governance requires more than a just a software tool!

AND WHILE WE'RE ON THE TOPIC …

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Security, like governance, needs to be anticipated and addressed. Start the conversation and planning early.

- Will you use SharePoint groups? (Azure) Active Directory groups? Both?

- Will you need more than the three built-in modern site SharePoint Groups?

- How granularly do you want to allow and control access to content (permissions)?

- Will you enable newer content sharing mechanisms?

- Will you need custom permission levels for some content?

- Could a third-party tool help? (the answer is "yes")

INTEGRATION FRUSTRATION

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Integrating external services or line-of-business systems requires careful thought and planning:

- Are you using an intranet framework? Just SharePoint?

- Does the target system supply web services or integration points that can be consumed?

- Does the team possess the technical capability and knowledge to perform the integration?

- Do you have the potential for XSS and/or CORS issues?

Advice: limit your initial scope of integrations. They can become a bottomless pit and time sink. And make sure the requirements have been written in detail.

REQUIREMENTS

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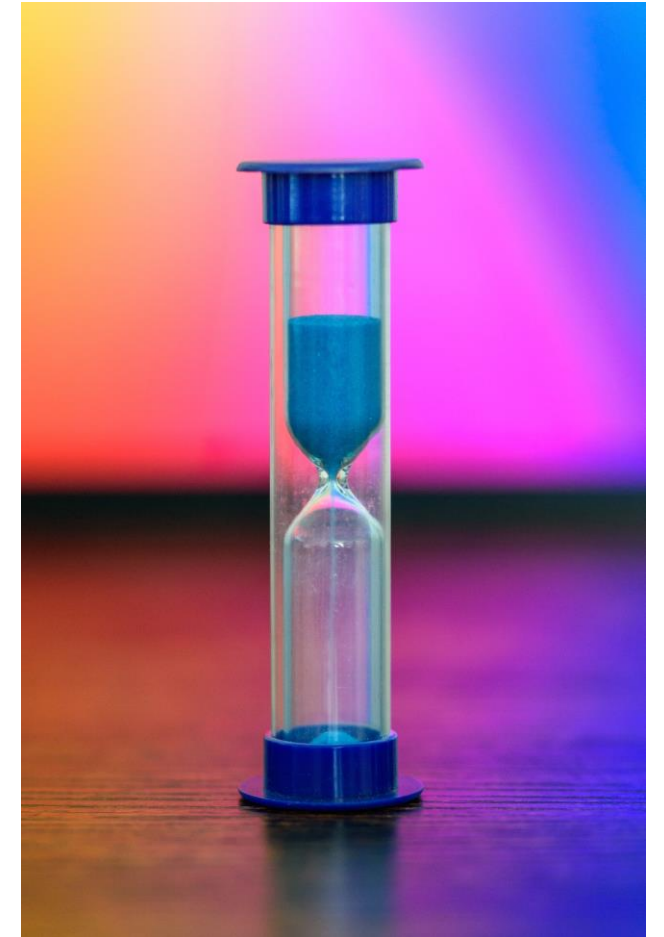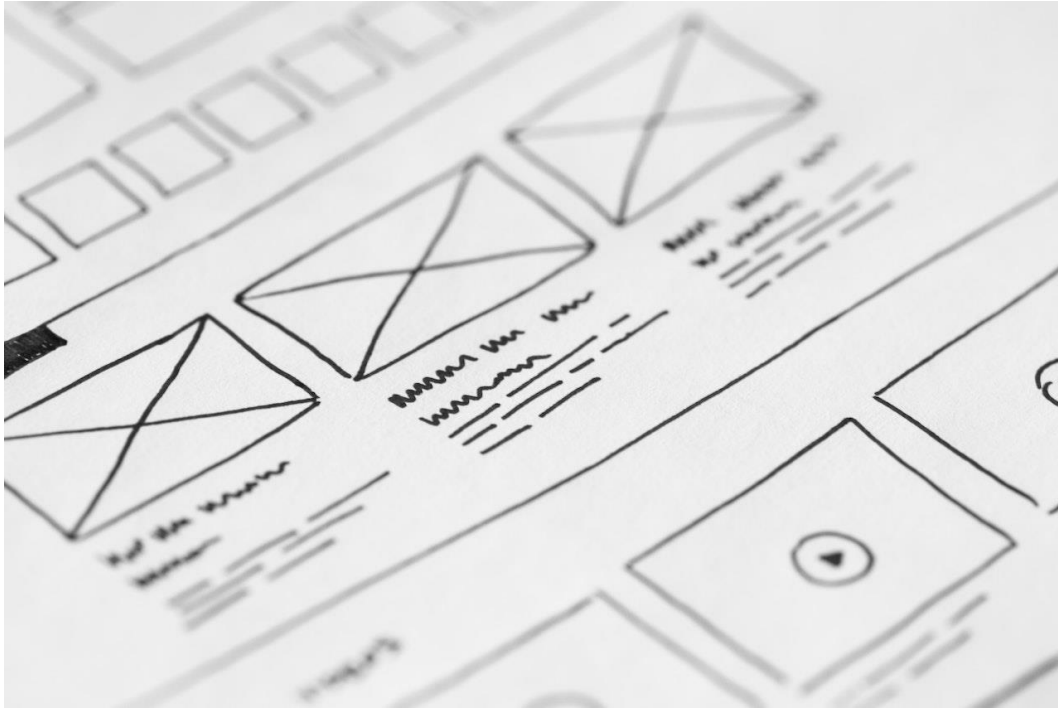
A wireframe <mark>IS NOT</mark> A user story

(and it is not a functional specification, either)

MORE REQUIREMENTS

This is where the business analysts (BAs) prove their worth.

- Rounding up wireframes

- Writing user stories

- Developing interface specifications
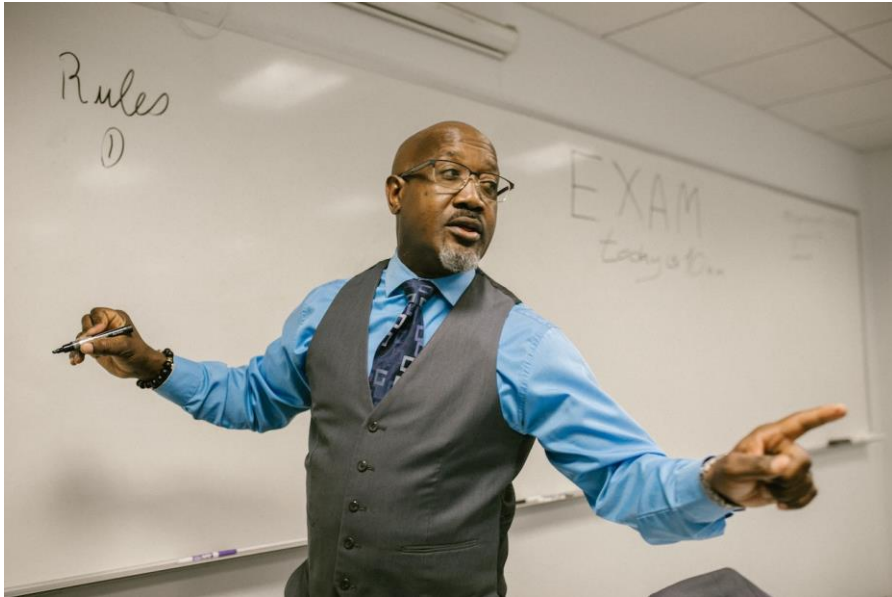
- Creating functional requirements

The BA is the "keeper of records"

A good BA will find answers to questions and disambiguate the unclear.

- It's a lot of work (and writing) if done properly.

- You may be tempted to see BAs as unnecessary. Don't fall into that trap!

- Developers will be left "unprotected" without one or more BAs assisting.

TESTING

If you don't let your user base see your work until you're done, you're missing the opportunity to adjust what you're building to meet _their_ expectations.

- Incorporate testing early and often.

- Lean towards data-driven design and ask users for feedback at every opportunity.

- SMEs play a role, but don't undervalue feedback supplied by average users.

- This includes technical/feature testing and user acceptance testing.

- **Please** staff a QA team!

RELEASE TIME

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The day you've been working towards all along – the moment when you can "flip the switch" and dazzle users!

- "Big bang" releases aren't recommended for cloud services like SharePoint Online

- They don't take advantage of cloud properties such as elasticity.

- Use Microsoft's SharePoint Portal Launch scheduler to stage the release out so that your SPO tenant can respond and scale seamlessly.

- See my blog post on the topic.

RELEASE TIME, PART TWO

Intranets seldom follow the plotline of "Field of Dreams."

- Just because you build it doesn't mean they'll come.

- A plan to build user interest is recommended.

User adoption can be its own challenge, so take some tips from those who have scaled that mountain.

- Teasers and progressive reveals.

- Intranet scavenger hunts.

- A contest to name the new intranet.

- Featured employee spots.

- Intranet usage tips and tricks.
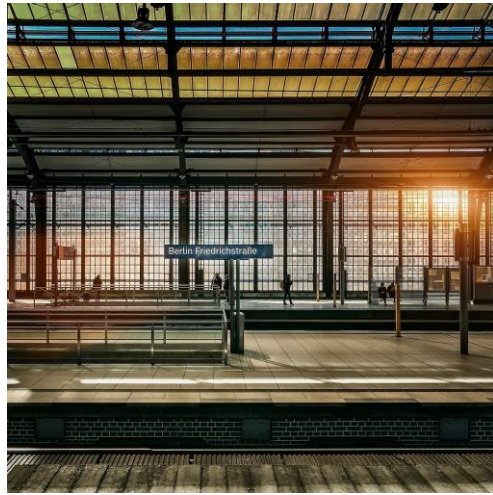
ARRIVING AT YOUR DESTINATION

ENJOYING YOUR VOYAGE

You made it!!!

- Take time to celebrate and appreciate what you've accomplished ... but not too much time, because as soon as you roll out your new intranet, you will get bug reports, feature requests, and more.

- Take time to rest, regroup, and re-engage.

NEXT STEPS

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The period after initial release often entails transition.

- The team may transform with support and new personnel

- Project velocity commonly slows to varying degrees

About your support model

- Who's doing support? Do *they* know?

- What are your SLAs?

- How many levels of support are needed?

- How do you prioritize what gets worked on?

A support model and associated framework is something you will want to have in-place ahead of initial release.

OTHER THOUGHTS

Some (definitely not *all*) concerns now that you're "live"

- What are your plans for when the site goes down? Because it will …

- If you have only one environment, you might want to revisit that decision.

- What have you set up to gather user feedback, input, and suggestions?

- How will you handle team members leaving? There will undoubtedly be knowledge they have that you won't want to lose, especially for new team members that will have to fill their roles.

- Site performance is a common next area of focus once the intranet is in-use. Expect to get questions about optimizing and improving the user experience.

- Will you need to upgrade at some point? What does that entail?

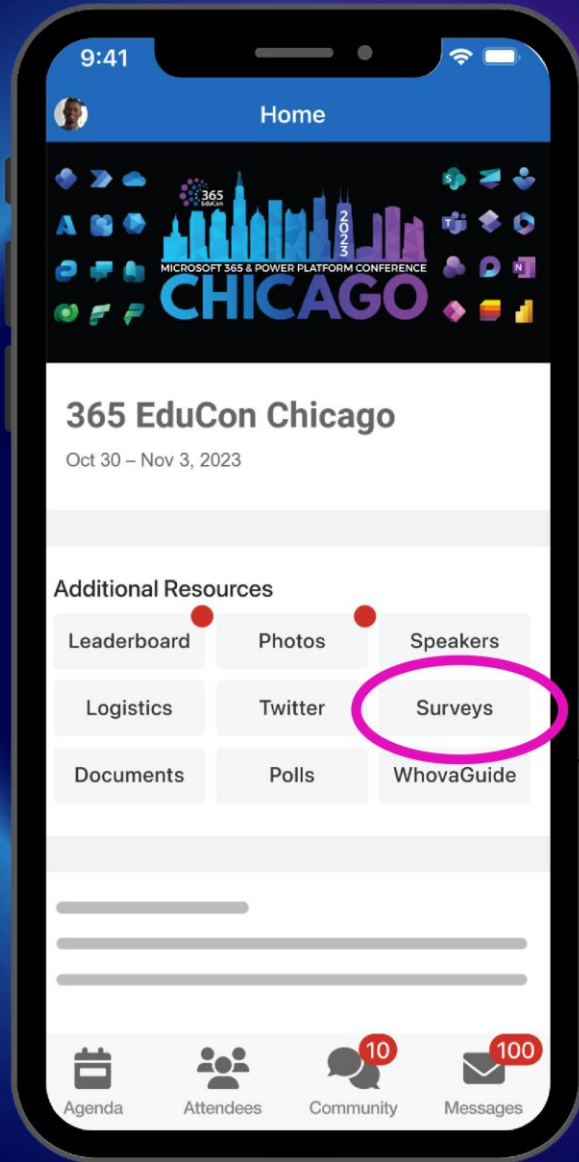- Do you have a plan to address the future and future needs in general?

Final
Questions
?

Thank you

WRAP-UP AND CONTACT INFO

How was the session?

Search for *Whova* in the App Store or Google Play

Fill out the Session Surveys in the **365 EduCon Chicago Event** and be eligible to win **PRIZES!**

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Microsoft 365 Conference

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About: https://spmcdonough.com/

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