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## Creating a Roadmap to SharePoint Success



Planning is the key to success in any endeavor. When it comes to the complexity of placing SharePoint in the context of a successful strategy for managing content; planning is absolutely crucial. Luck won't help you.

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— Alan Weintraub

When considering a Microsoft Office SharePoint Server 2007 solution, there are six major knowledge areas to explore. These SharePoint solution components should be considered when defining the SharePoint Roadmap. The feature areas are as follows:

**Collaboration** - Creating an environment that allows teams to work together by providing an intuitive, flexible, and secure capability for sharing information.

**Portal** - Delivering the capabilities to personalize the user experience of an enterprise website by providing individuality, security, and social networking capabilities.

**Enterprise Search** - Locating relevant data and content distributed across a wide range of sites, document libraries, business application data repositories, and other sources. Enterprise search also supports the location of appropriate resources to address specific questions.

**Content Management** - creation, review, and management of content, regardless of the format of the content. Content management can include document management, records management, and Web content management.

**Business Forms and Integration** – Creation and implementation of forms that drive the enable business operations through the use of business process workflows. The forms are delivered via standard Web browsers and can be extended via the integration with databases and third party applications.

**Business Intelligence** - Delivery of business critical information using a wide range of solutions, including server based Excel spreadsheets, SQL Reporting and KPI tools, to assist in the decision making process.

Building the SharePoint Roadmap

Building a successful roadmap involves three areas: People, Process, and Technology. Business processes



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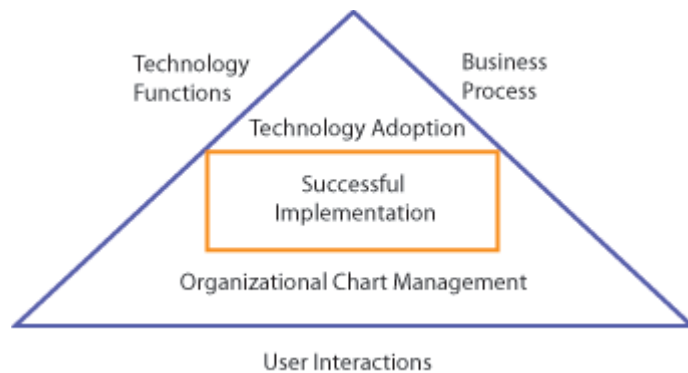
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represent the way we capture information, organize and store the information, and, ultimately, use the information in our decision processes. The technology functions include all system components that make up the SharePoint solution. However, even the best technologies and logical business processes will fail if the user community does not readily adopt them.



The SharePoint Roadmap helps set a vision for a SharePoint project and define how that vision will be achieved. The goals of the roadmap are to help the business users understand their needs and how SharePoint will help achieve their goals. In developing the Roadmap, a number of topics are addressed:

- SharePoint vision: Work with senior managers to align the SharePoint vision with business goals.
- Governance: What is needed to allow all departments or parties to help define and implement the SharePoint system?
- Determine desired features: What functionality is needed?
- Prioritize features: Determine the complexity and importance of each feature
- Technology gap analysis: Understand and document what technologies are needed for the overall solution
- Roadmap: Define in text and chart format what will happen over the next 18-24 months.

#### SharePoint Roadmap Benefits

The intent of the SharePoint Roadmap is to define a SharePoint vision aligned with business goals and then create a structured approach to building a SharePoint solution that meets those business needs. The SharePoint roadmap provides the following benefits:

- Aligns your SharePoint solution to the business needs and strategy
- Defines governance with input from multiple organizations
- Leverages your company's users to define the most important SharePoint applications and features
- Defines what technology is needed (and when) in order to make the SharePoint a success
- Helps ensure your SharePoint and integration projects are on track to achieve technical and business objectives

At the conclusion of the Roadmap development, your organization will be able to develop a plan for a successful SharePoint implementation. This plan will help your organization:

- Gain a better understanding of the business background and expand your knowledge of the business and user requirements necessary to complete this project.
- Define the functional, content, and management needs of the SharePoint solution to drive future phases of development.
- Map the business requirements to the SharePoint architecture being developed to assess what components can be leveraged in this initiative and what gaps still exist.

Create an implementation roadmap that maps the user requirements to phases of the project and defines the phase timelines and deliverables. This roadmap will also be used to estimate the remaining phases of the project.

Developing a SharePoint Roadmap will ensure that your organization will be able to align the business goals with the capabilities provided by SharePoint. Engaging the business to define the desired functionality of the SharePoint solution is the one key activity to a successful implementation.

Agree? Disagree? Have your own roadmap? Share your thoughts and opinions at the [blog for Infonomics, Information at Work](#) .

*[Alan Weintraub](#) is a Principal, ECM Solutions for [Perficient](#) . Alan has extensive experience in all phases of Enterprise Content Management solution implementations. He has worked as a Research Director at Gartner, focusing on the Content and Document Management markets and a consultant where he designed and implemented document management systems. Prior to his consulting experience Alan engaged in technology management for major pharmaceutical companies. He has over twenty five years of experience in the information systems profession.*