

Maximize Business Value with

# SharePoint Collaboration & Training



## EXECUTIVE SUMMARY

The act of collaborating is people working together as a team for a common purpose. In fact, almost every facet of life involves some form of collaboration, including the workplace.

This year, social collaboration will be more important than ever for business. A recent survey conducted by the Brandon Hall Group, shows that companies are becoming increasingly unhappy with their current LMS and rank social and collaborative tools as a top priority.

The need to demonstrate a stronger link between learning and performance is becoming more and more important for learning and development professionals. And, according to research, this is achieved by incorporating informal or 'social elements' into learning plans.

Companies that acknowledge the importance of collaboration in the workplace reap the benefits of increased efficiency, employee retention and job satisfaction, development of employee skills and an increased pooling of talents and strengths.

Using digital documents is the norm these days and most workers are generally interacting exclusively online. As a result, we are now being introduced to a whole new way of supporting collaboration and training.

## The Business Problem

In order to receive true value from collaboration and training, there must be a careful analysis of what systems are currently in place to support it, and what goals are needed to achieve this. This paper will cover four key areas:

1. Enterprise Content Management
2. Business Process Management
3. Document Management
4. Social Collaboration



## SharePoint + ShareKnowledge Offer Perfect Solution for Collaboration and Training

SharePoint and ShareKnowledge together offer a variety of tools to help support and foster effective collaboration and training. This paper will explore the topic further and explain how the two systems can deliver the right results with features like:

- Team Sites
- Discussions linked to training
- Workflows
- Collaboration on documents
- Chat/messaging
- Access given by job role or title, department...
- Streamline and organize with project management tools

## ShareKnowledge's Industry Knowledge

ShareKnowledge is the first corporate LMS built on SharePoint. A Microsoft® Partner with Gold Application Development Competency, ShareKnowledge is considered the industry's most valuable SharePoint add-on – providing a powerful learning solution that will transform your organization and propel business productivity.

Not only are we SharePoint experts, but the folks at ShareKnowledge have over 20 years of combined eLearning experience.

ShareKnowledge is an award-winning learning software system and regularly cited in industry publications. We also have a deep intrinsic knowledge of the market, specifically in the corporate environment.

## What is collaboration?

Collaboration is a hot topic these days and one that organizations are finding greater value in. Collaboration is essentially how employees and all those involved work together for the benefit of the whole, i.e. your business.

The benefits, of course, can mean different things to different groups, but most find that collaboration in the workplace will ultimately give them a competitive advantage in the market.

No matter what though, the consensus is that achieved outcomes can only happen through people working together through collaboration. At the same time, there are many obstacles to collaboration that tend to greatly prevent the creation of value.

It seems every aspect of our lives, from personal to professional, has been overtaken by technology which significantly changed the way we collaborate. Now we're exploring how the role of IT systems play in these processes.

For many organizations, collaboration comes in the form of digital means. Gartner defines digital collaborations as: "Collaboration comprising of software products, tools and hosted services to organize, access, use and share content. Collaboration initiatives involve managing and interacting with a multitude of content types including documents, records, images, forms and increasingly, digital media."

What seems like eons ago, collaboration used to mean simply using email and network drives. These methods are still around today but now we have more high-tech options, as well as innovations in software and services.

A perfect example is the use of intranet systems which has taken the best of the Web and used it to help organizations collaborate internally. And, most recently, we've seen the explosion of social features that bridges the personal-business divide and gives a voice to workers where they previously didn't.

### In summary:

- Collaboration is, at a basic level, people working together.
- Collaboration is the driving force behind most organizations and companies.
- The term collaboration is now almost synonymous with digital collaboration.
- Collaboration is working online or offline, interacting with digital content and assets, and communicating with other users.
- A vast array of software tools and services exist to facilitate better collaboration.

## What is SharePoint?

SharePoint is renowned for its superior content management capabilities but in more recent years it has also gained notoriety for its collaboration features. SharePoint is certainly not a one trick pony and can be used in a number of ways - websites, content management system, intranet/extranet, document management system or enterprise social network.

This piece will take a closer look at these uses, and specifically the areas that make collaboration and training better. SharePoint was first introduced by Microsoft in 2001 and is now on its fifth major release (also known as SharePoint 2016). For the intent of this paper, we'll discuss the most widely adopted version, SharePoint 2013. It is available in two formats:

### 1. As a stand alone product

SharePoint 2013 is offered as a standalone product and can be installed and run on the appropriate server hardware. Using it in this manner is called 'SharePoint on Premises' because everything is run locally by the company using it, like most traditional enterprise platforms. All data and content is also stored locally.

### 2. As a cloud product

The other SharePoint option is as a cloud product. In this instance, SharePoint is hosted and maintained in Microsoft data centers, and all access and configuration is done via the Web browser.

SharePoint 2016 introduced a hybrid option as well, combining on premise with Office365.

## SharePoint Functionality

The On Premise and Cloud versions of SharePoint 2013 generally offer very similar feature sets. Microsoft categorizes the functionality of SharePoint 2013 down into five groups:

# Maximize Business Value with SharePoint Collaboration & Training

## 1. Share

SharePoint social features empower teamwork and gives the ability to track and follow coworkers and the content they create, work together on team sites and engage in community forums.

## 2. Organize

SharePoint 2013 integrates with Outlook and Microsoft Project, allowing for easy tracking of tasks and project deliverables. Team sites offer a central location to store documents and collateral, with sharing and permission controls to ensure only the right users have access. OneDrive for Business provides a seamless way to store and sync offline documents, with advanced document management features like versioning for those that need them.

## 3. Discover

In order to collaborate it's crucial to find the right people. SharePoint allows users to easily connect as well as offer powerful analytical and search tools to analyze and understand content.

## 4. Build

SharePoint facilitates eye catching intranet and extranet sites and is extensible via an official App store. The Cloud App model allows custom functionality to be created using common Web technologies.

## 5. Manage

**The cloud version of SharePoint can help manage infrastructure costs, while any version can manage risk with powerful records and case management capabilities. SharePoint frees users to spend more time on collaboration, scaling performance and power as needed.**

## Delivering Business Value

As mentioned previously, the pressure is on for learning managers to show a direct link between learning and performance. And, we now know that informal learning and collaboration play a big role in this.

A training and collaboration system, once built on SharePoint or any other platform, must deliver business benefits for it to be useful.

But this value can be broken down further, and a number of associated benefits defined. These are:

- **Functional.** Functional benefits are the first and most obvious – offering new capabilities you might not have had before. An example would be a search tool to find documents or a social tool to communicate with your coworkers. This paper will give a number of functional benefits in order to train and collaborate better.

- **Technical.** Just like a functional benefit offers a 'new' way to do something, a technical benefit 'improves' a way of doing tasks that were already possible. A simple example might be that email gives a technical benefits over hand written notes just as SharePoint 2013 offers a number of technical benefits over other collaboration platforms like search capabilities, security and performance.
- **Financial.** Being introduced to new functionality and technical improvements is wonderful, but collaboration can also reduce costs. This could be by delivering similar services for a reduced outlay, or delivering capabilities that lead to a wider company saving. The benefits looked at in this paper can all have a positive impact on an organization's bottom line, and examples of these are highlighted in the appropriate section.

This paper looks in detail at four key business areas where a SharePoint training and collaboration system can deliver benefits to an organization. These benefits are as defined:

Enterprise Content Management

Business Process Management

Document Management

Social Collaboration

## Enterprise Content Management

Every company, no matter the size, has content that has been accumulated over the years. This includes documents, presentations, SOPs, policies and much, much more. How they are managed can get confusing when there are multiple people across an organization involved. As it relates to collaboration, an ECM is structured around how content is created and shared among users, inside or outside the company.

### Defining the Problem

In the area specific to Learning and Development, issues with finding and managing training content it is still very much a big problem that many companies face.

More complex situations like co-authoring a document online or updating an intranet with the most current HR policies can be even more challenging. Three of the biggest issues companies face today when it comes to ECM and collaboration are:

- **No single version of the truth.** For many, many years companies generally stored content on their local computers – local hard drive, local server, shared server. This allowed users to save information in various folders within folders, causing a lot of problems with regards to control and governance. There was no structure on location or classification of the files in an enterprise context. As a result, staff can't work effectively because they don't know where to find the right information – what exists already or doesn't exist at all.
- **Findability Issues.** There is nothing worse than not being able to find something and a big reason 'findability' continues to be an issue with organizations. As a result, this reduces productivity when not addressed.
- **Assigning the right resources.** Collaboration is partly about finding the right people to work with, and Enterprise Content Management suffers from not being able to allocate the right people to the job. The creation and management of enterprise content can involve a wide range of content types. Examples include documents, images, videos, audio, as well as more complex data structures and associated metadata. This wealth of information needs to be handled by the appropriate human resources – something made impossible if this information can't be adequately identified.

## The Benefits of Good Enterprise Content Management

Using SharePoint as an ECM can address some of the issues stated above:

## 1. A Single Version of the Truth.

SharePoint excels at organizing data and content in a centralized system – perfect for training purposes. This reduces the duplicate nature that often times happens. And, using permissions, companies can feel confident that their content is stored in the right manner but also accessible only by the correct people. For those in highly regulated industries, compliance is a big issue and this feature is a major bonus.

SharePoint supports sites, pages, lists and content types – which when combined offer the tools to store and organize almost any form of data:

Sites are essentially a place to collect content (such as documents) in a collaborative environment. Users can quickly and easily create, publish and share information with their colleagues. This is beneficial because instead of spending time gathering content they are able to analyze and drive discussions instead.

Lists are the primary means by which SharePoint stores custom data (e.g. contact lists, task lists, Excel or externally sourced content). Using powerful list management tools users can store and interact with a range of enterprise data types.

Content types enable lists to be created and managed in structured reusable ways. They also allow list templates to be defined, and can include complex metadata, record and audit definitions.

## 2. Findability.

SharePoint 2013 provides a much improved search experience than in years past. It revolves around not only tailoring the content so that it is not only findable, but displayed in a way that is easy to consume the information. Not only are search results rich, including document previews and inline videos where appropriate, but the refinement controls make it easy to tweak the returned results.

## 3. Assigning the Right Resources

With SharePoint 2013 it is easier than ever to get the right people together. This is so important when creating content for training because more than likely there will be multiple people adding their input. My Sites provide each person the opportunity to create their own profile and content area that provides details about their expertise. In addition, there is also a dedicated 'people search' feature that makes it easy for them to find one another.

*"WHAT USED TO BE A TEDIOUS PROCESS IS NOW MANAGEABLE WITH SHAREPOINT AND ULTIMATELY HAS CHANGED THE WAY COMPANIES STRUCTURE THEIR LEARNING PROGRAMS. MORE OFTEN THAN NOT, MULTIPLE PEOPLE AND DEPARTMENTS ARE INVOLVED IN CREATING LEARNING CONTENT WHICH CAN OPEN THE DOOR TO ERRORS BEING MADE. USING SHAREPOINT FOR TRAINING OFFERS BETTER CONTROL OF CONTENT, A STREAMLINED METHOD TO THE MADNESS AND INCREASED PRODUCTIVITY AND EFFICIENCY."*

— Eric Fickeisen, Sales

## Business Process Management

A business process is an activity or set of activities that will accomplish a specific organizational goal. Business process management (BPM) is a systematic approach to improving those processes. When it comes to training and collaboration, using a system like SharePoint streamlines all the variables that come into play.

### Defining the Problem

Whilst technology platforms like SharePoint features the tools to implement complex business processes, many companies are still unable to execute even the most basic of tasks. More complex business process tasks, those with elements of workflow, form entry and data processing have proved equally difficult for companies to digitize successfully. There are a number of reasons for this:

- **Difficulty Defining the Problem**

Often the first step to implementing a business process is defining what the problem is first. Many organizations fall at this first hurdle, failing to get to grips with the core activities and actors involved. Take creating a course for example. There are usually multiple people that need to be involved and sometimes there could be several versions of one document circulating that makes things very confusing and not consistent.

- **Complex Development**

Once a problem has been defined, coming up with a solution can also be difficult. Often business process projects, once defined on paper, struggle in the implementation phase.

- **Embedding Change**

Once an adequate solution is in place, many organizations find it difficult to implement its use within their organization. This is often due to lack of awareness, but also the difficulty people may have in accepting and embracing change to the status quo.

## The Benefits of Good Business Process Management

SharePoint can help to address some of these issues described in the previously, and implement really usable BPM in an organization:

- 1. Defining the Problem.** SharePoint helps to bring together the right people to discuss the issue in the right way. SharePoint sites, document management features and social tools can all provide the ideal collaborative environment for the right set of users to discuss and analyze an issue and really get to the root pain points.

In addition, SharePoint 2013 offers a number of dedicated project management features:

- A site mailbox acts as a single location to store and retrieve project specific communications. With its own email address and dedicated storage within a SharePoint site, a mailbox can be the perfect way to centralize project communications.

- Document management has always been a strong toolset of the SharePoint toolset. Specific features include check in/out, versioning and meta data. Using Office Web apps documents can even be co-authored and edited online via a browser.

- 2. Reduced development and risk and complexity.**

SharePoint really excels as a 'power user' platform, one that can be customized and configured by end users via its graphical user interface. This means SharePoint can be put to work solving difficult problems without resorting to complex development projects. This is a great feature for learning and development managers.

These 'no code' principals even extend to complex workflow tasks, which can be created and customized in a variety of ways:

- A number of standard workflow processes are available 'out of the box', and can be configured to suit specific requirements.

- More complex workflows can be built using the graphical tools provided by SharePoint Designer and Microsoft Visio 2013

- Third party tools like Nintex Workflow allow almost any workflow process to be designed and deployed without resorting to writing code.

- 3. Successfully Embedding Change.**

SharePoint 2013 is an engaging and useful platform, featuring a number of user interface and usability enhancements over previous versions. These include adopting the innovative Microsoft 'Modern' UI now seen across Office 2013 and also modern Web enhancements like document drag and drop.

Many organizations already run versions of SharePoint to power their website, intranet or extranet presences. By using the same tool to power business processes, and integrating directly with other systems, users can reap the benefits of business process automation without having to learn or use a totally new platform. SharePoint offers key features called Business Connectivity Services to support this 'joined up' approach, allowing it to connect and synchronize between disparate enterprise systems.

# Maximize Business Value with SharePoint Collaboration & Training

If you're in business there is no way you can escape some kind of document management system, whether it be from the Windows 'My Documents' folder to file shares and systems like SharePoint. These days, files are almost exclusively digital so good management of this environment is crucial to achieve efficiency.

Nearly every modern company operates some kind of document management system, from the Windows 'MyDocuments' folder, to file shares and systems like SharePoint. Documents are now almost always created digitally so good management of this environment is crucial to achieving effective collaboration.

## Defining the Problem

There is no question that content is king and the backbone of any learning program. Trainers spend hours putting together learning material in preparation for a class, whether in-person or online. Often, this includes multiple people and several versions of documents.

To put it in perspective, companies can produce in upwards of hundreds of eLearning modules each year from PowerPoint presentations to video, webinars and reading material to name a few. And, of course, these courses need to be updated regularly.

As you can see, content creation can be a complex process which is why it's so important to have a good document management system in place. Because, as we know all too well, the more a document is moved the more it leaves the door open for errors. Remember the telephone game? Someone tells the person next to them a piece of information from which they tell the person next to them and so on and so forth. By the time it reaches the last person, the message is completely different. This is very much what happens when crucial training information goes from computer to computer, file to file, email to email. Uploaded into this system and that system.

Poor document management can lead to a number of problems:

## 1. Lack of good organization and governance.

Many organizations are still using old fashioned file shares to store documents, with some using nothing more than Windows 'My Documents' folder. These rudimentary file stores make it impossible to organize files in a useful way. Not only are concepts like metadata unheard of in these environments, but even a well thought out folder and file structures are near impossible to maintain. Files are located in numerous local stores and access is fragmented – central policies simply cannot be enforced.

Much more seriously is the lack of governance of many of these systems. Lack of version control means file changes and changes cannot be tracked properly (between single or multiple authors), and some systems do not even implement basic backup rules.

## 2. Limited Collaborative Working

Many of the organizations use desktop applications to create files, local folders to store them and email to share them. It is nearly impossible to collaborate when using these methods. People can't work on the same file, multiple versions exist in different locations and coordination of any activity is extremely difficult.

## 3. Ineffective Search

A consequence of the type of file share systems described above is a lack of adequate search. Documents siloed on desktops, local machines and even file shares simply cannot take advantage of the sort of search and retrieval technology that many users now expect and require to do their jobs

## Providing a Solution

SharePoint can help support and promote good document management in a number of ways:

- **Organization and Governance**

SharePoint supports content types to control the organization of documents. Content types help to define and control the following:

- a. The document template that will be used (e.g. how the document itself looks and is laid out)
- b. The types and formats of columns that will make up any metadata (e.g. description of a document)
- c. The workflows that are to be associated (e.g. approval steps for a document)
- d. Information management policies (e.g. how a document may be viewed or printed)
- e. Records management policies (e.g. how long a document may be kept for)

Content types, when configured correctly and used in conjunction with sites, document libraries and views allow a sensible document structure to be created, enforced and maintained. Content types also help enforce good governance of documents, by defining records and information management rules

- **Collaboration**

SharePoint supports full collaborative working, using a number of tools:

- a. SharePoint sites and document libraries support user integration, allowing users to be contacted directly from the SharePoint interface where the name appears next to a document.
- b. Version control, version history and check in/out allow controlled collaborative working on documents.
- c. Office Web Apps, and the Microsoft Office 2013 Suite, supports online and offline collaborative working including real time co-authoring of documents.
- d. OneDrive for Business provides a dedicated personal storage space for documents, and allows external users to be invited in to view and/or edit content. Offline sync allows collaboration to continue when there is no internet connection.

- **Search**

As this paper has already looked at, the SharePoint 2013 search engine comes packed with a number of powerful content and people features. It also includes a range of document specific functionality:

- a. The search engine indexes all file metadata as well as file content.
- b. Results are automatically security trimmed.
- c. Full document 'hover' preview (within search results, for Office and PDF documents).
- d. Inline content pulled directly through in search results.
- e. Icons to identify file formats. Other useful features include:
- f. Major and minor versioning, with full history and comments.
- g. Check in and out.
- h. Approval workflows.
- i. Close integration with Microsoft Office.

*"AN OFTEN OVERLOOKED AREA OF TRAINING IS DOCUMENT MANAGEMENT. OUR CLIENTS VALUE THE FACT THAT THEY CAN EASILY STORE ALL TRAINING MATERIAL IN THEIR SHAREPOINT ENVIRONMENT AND THEN SEAMLESSLY TRANSFER LEARNING MODULES TO SHAREKNOWLEDGE. FOR THOSE IN A HIGHLY REGULATED INDUSTRY, THIS IS ESPECIALLY USEFUL BECAUSE THERE IS NO RISK FOR ERROR"*

— Anna Melnik, Marketing Director

# Maximize Value with SharePoint Collaboration & Training

Results from a recent survey show that companies are unhappy with their current Learning Management System and rank social learning and collaboration as a top priority. This is because collaboration is tied to increased proficiencies, effectively achieving business goals and enhanced employee satisfaction.

Interesting fact: A company's Learning Management System accounts for about 40% of the learning technology budget, but many are spending an additional 5% more on social and/or mobile technology and that's expected to increase.

For the savviest of learning professionals, utilizing established software, like SharePoint, will reduce costs and improve training outcomes. When employees are given a voice, via social tools, they feel they are providing a useful contribution to their organization. This in turn can help them feel more useful, more engaged and a bigger part of the organizational culture – collaborating more effectively as a result.

## Defining the Problem

One of the key findings in a Brandon Hall study was that 50% of companies feel that discussion forums are critical to success, but only 5% are happy with their current platform. Participants in the study also noted that certification and learning paths were of particular concern and needed improvement.

Social collaboration can play a huge role in helping companies interact better online. Often these relationships are built as much on conversations and social connections, as they are documents and project deliverables.

At the same time enterprise social networking can address the following problem areas:

- **A remote workforce means workers are in different locations and have different patterns**

The way we work today is very different than in years past, and remote workers are the rule not the exception now. Not only do they work in different locations but different patterns – working from home, flexible hours and part-time. This makes traditional forms of communication difficult – physical meetings, telephone calls and even email.

- **Too much email**

Email for a long time has been the 'go to' social tool. Yet many users are now weighted down by the sheer volume of emails they receive. As a result, a new email has lost its impact, its urgency and its importance. At the same time email doesn't offer much in the way of social context. Email isn't instant, doesn't include background information, and is not supported by a connected network.

- **Changing user expectations**

Social, in the consumer world, is no longer a new tool. People are used to websites like Facebook, Twitter and LinkedIn. They are used to accessing real time information on people, communicating instantly on the Web, and publishing and consuming content in a social fashion. These trends have had a big impact on what these same people expect in the workplace, from enterprise tools.

## Providing a Solution

SharePoint + ShareKnowledge offers the ability for organizations to collaborate in a social manner:

### 1. A different way to communicate

What many people don't know is that SharePoint 2013 has a built in social network with team sites, community sites and Mysites that include activity feeds, discussion boards, instant messaging and much more.

### 2. A modern social tool

SharePoint 2013 was designed to address the demands of people used to working in a social way by functionality cues from the likes of LinkedIn and Facebook. Chat and messaging is probably the main focus of a collaboration software system. Different systems offer different features but messaging in real-time should be at the top of the list. Fast communication is essential but the system should also provide message boards and forums, web conferencing, discussion threads, email and an RSS feed to keep up-to-date.

### 3. Document Management

The ability to collaborate on documents and share files is especially important for trainers who create learning modules. Training managers know all too well that creating a course is not a one-man show. Often times multiple people are involved from various departments. Therefore, it's imperative to have a streamlined way to collaborate on training documents that also has some sort of versioning and auditing capabilities.

On the flip side, when using collaboration software for learners, having a document management system, like SharePoint, is helpful so training materials can easily be downloaded for viewing. There is much less instances of mistake when files aren't being transferred from one system to another.

### 4. ShareKnowledge allows training to go social too

The best of both worlds – ShareKnowledge is the icing on the cake when it comes to training and collaboration. SharePoint provides document management and social features while ShareKnowledge provides learning paths, certifications, reporting and more – a complete training and collaboration tool.

For instance, a training manager can create a class and store it in SharePoint. His/her colleagues can contribute, using social features, to the creation of the course and when finished they seamlessly transfer the course to ShareKnowledge. Students can then go to discussion boards to chat more about the class or assign a survey afterwards.