

The background of the entire page is a photograph of a business meeting. A woman in a white blouse and grey skirt stands and speaks to a group of people seated around a conference table. The room has large windows and a rustic wood-paneled wall.

# Why getting SharePoint right is key to adoption

Stop taking the path of least resistance

# Introduction

Migrating a client to Microsoft 365 is too often a case of taking the path of least resistance.

What do I mean when I say this?

We know there are a million good reasons for a client to migrate their business to Microsoft 365. A usual place to start is with email, where all the effort is behind the scenes and to the end user there is virtually no impact. They just come in the day after, open Outlook and off they go. Little do they realise the blood sweat and tears their IT provider has gone through to make this happen.

But when it comes to migrating documents, then the approach is often that SharePoint must be "hidden", or there is a belief that the end user is potentially facing an insurmountable adoption process.

The path of least resistance is therefore to mimic, as close as possible, the folder and network drive experience the end users are familiar with.

## **Why getting SharePoint right is key to adoption.**

Before we start, here is my definition of the path of least resistance.

The migration of documents to a single SharePoint site with one or more document libraries, often representing each client network drive, and then initiating full sync to each user's device.

I refer to "one site".

But I have known implementations where the client was not migrated to one site, but instead a number of sub-sites have been created that map onto the key network drive and folders.

However, from a SharePoint perspective this is still "one site". Sub-sites is a concept that only exists to support legacy migrations from on-premise to SharePoint online.

Sub-site structures are no longer recommended by Microsoft and if they are used, it is not so much taking a path of least resistance but more a path of no return!

So, let's explore the dangers and pitfalls of taking the path of least resistance when it comes to documents in SharePoint.

To begin with, when engaged most clients will admit that their current method of storing documents in network drives and folders is not optimal and wastes lots of time. Documents cannot be easily found or duplicates exist, making it difficult to be confident that they are working with the latest version.

Most clients cannot with any confidence explain their document structure and be confident structures are used consistently across the firm.

In fact most will complain that their staff randomly create more folders, and that no one understands why they exist or what they contain. So why replicate this situation, by migrating en masse to a handful of document libraries in a single site, and then compounding the problem by syncing everything to every end user device? This is just a way to replicate all of the issues that already exist today.

Syncing documents and files to end user devices is replicating corporate data. End of story.

This creates a situation that is even worse than the old environment from where the client has migrated. The data now lives not only centrally in the cloud, but on every device. This is creating huge corporate risk of data loss or breach of regulations such as GDPR.

Unfortunately, end users do not understand the concept and it is not unusual, in fact it is fairly common, for a user to take it upon themselves to "reorganise" the data on their PC. They don't realise this has now impacted every other user that syncs with that data. If reorganising means moving the data to another area on their PC, then the sync engine will see that as a delete event and remove the data from the central cloud storage, and from every other device that syncs to it.



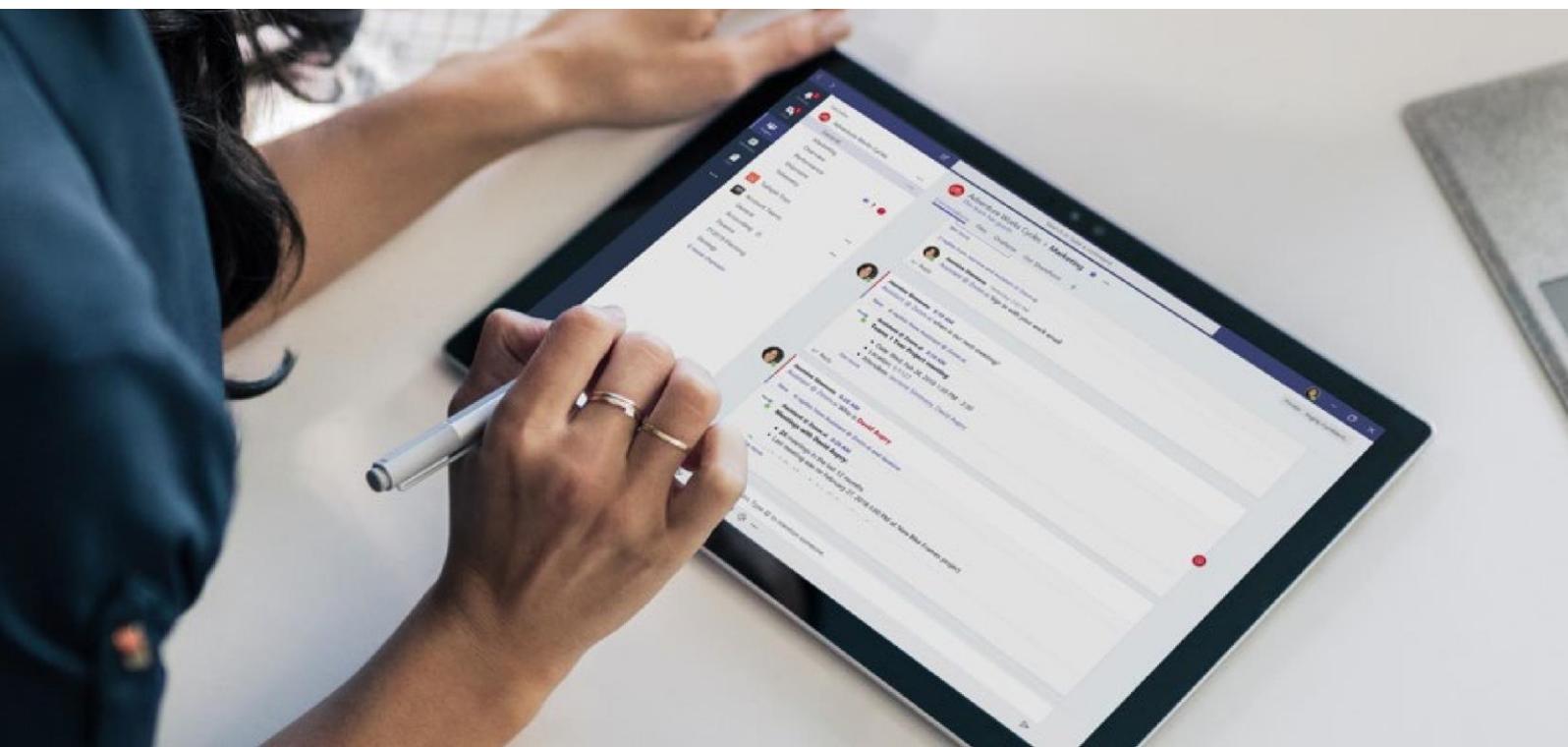
Even if documents are migrated to different document libraries, if those document libraries are in the same SharePoint site, then you have just created a permission management and support nightmare.

SharePoint security and permissions are built around the site. The permission groups for all sites can be viewed and managed centrally via the Microsoft 365 Admin Center or via Active Directory, or even using PowerShell. Nice and simple from a support and governance perspective.

With a single site approach, every end user needs access to that single site. In order to protect sensitive and confidential documents within the site, you then need to start breaking permission inheritance at the document, library or folder level. These "hidden" permissions become increasingly difficult to track and manage as users join, leave or change roles, creating risk that the wrong individuals have access to the wrong data.

Finally, if down the road the client decides they want to fully utilise and benefit from Microsoft Teams - to improve internal collaboration and to enable those teams to access their department or functional data - then you just cannot do this.

A Microsoft Team only fully integrates to a single SharePoint site. So, if marketing, accounts or operations want to use Teams and all the data lives in one site, then you just cannot achieve this without undertaking another data migration and more changes to end user devices as the sync engine is no longer aligned.



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The only perceived benefit of taking the path of least resistance is to minimise the need for end user training and to reduce adoption issues relating to the use of SharePoint and working in the browser.

There is a better way forward.”



So what is the best practice way forward?

## Sites are a good thing

Do not be afraid to create lots of sites.

This is not information sprawl but good information architecture and governance, using clean centrally managed permission models.

## The browser comes first

Take the default approach that users will work via the browser and sync will only be used in selective approved scenarios.

Once business owners understand the risks to their business that mass syncing creates, they will buy into this approach.

**There is no golden path to achieving best practice implementations, every client is different.**

**But there are steps that can be taken to achieve the best outcome for each client.**



These simple steps will help make your SharePoint migrations more successful and improve outcomes for your clients and their users.

STEP 1

Ask the client if the current structure of drives and folders still maps adequately to their business, as it is today or their plans for tomorrow.

Get them to open up about the issues they would like addressed.

STEP 2

Obtain a structure chart for the business and document some of the interfaces between the different levels of the structure to identify internal document sharing requirements.

This might lead to the creation of additional sites.

STEP 3

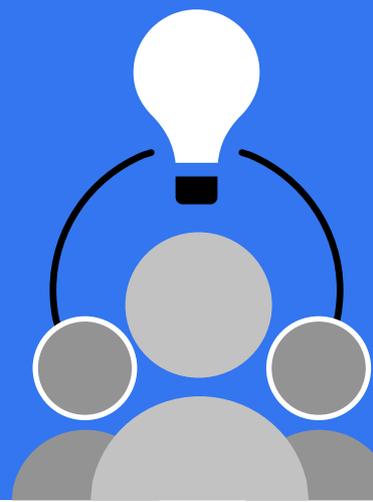
Do not be afraid to create multiple sites for a single department to avoid breaking permission inheritance.

Human Resources is often a good example. You may have a central HR team or individuals looking after staff records; HR management, who should be the only individuals accessing partner or director information; and then the general staff who need access to HR policies, manuals, forms and guidance.

Put all this in one site and you have a permission challenge on your hands, so create three sites.



Getting the environment right before migrating a client will bring long-term benefits to the client and to those providing support."



#### STEP 4

Identify with the client any outsourced services that need access to company data.

Typical examples are finance outsourced to an accountancy firm or HR to a consultant. If all the data is in one site and a folder, then selectively sharing the right information with the right external partner will lead to more breaking of permissions and more risk.

Much easier to just give the accountancy firm access to the dedicated accounts site.

#### STEP 5

As a result of your discovery and planning, you will now have identified the majority of the SharePoint sites to be created. Many of these will be common to every organisation, for example: marketing, accounts, sales, operations, management, etc. You also now have a clean target environment for mapping the client's data.

#### STEP 6

Introduce the client to SharePoint Communication sites, at least for the main root site where everyone should have access.

The client immediately gains a company communication hub - or intranet - where news, events and key company information can be centrally published and shared, and where navigation can be implemented to ensure users can easily find the information they need.



## STEP 7

Create clean and personalised navigation menus using all the available techniques in SharePoint, including hub site menus, the new mega menus releasing soon, and individual team site navigation.

To personalise navigation you can restrict visibility of navigation options to only those groups that need to see them. Why show everyone the accounts navigation menu when only accounts can access these areas?

Hub sites and mega menus enable you to target audience each item, using the same permission groups that match to the sites you previously created. There are no overheads to this, just benefits!

## STEP 8

Finally, train the users on the new platform.

This is not as daunting as it seems. Yes, there will be some resistance, but first get the buy in of the company owners and directors. Make sure they understand the benefits all your hard work will bring them and how you have made them a more flexible and productive company.

More and more clients will have individuals who have previous experience of Microsoft 365, or have previously worked in Google Docs or are from the younger generation. These are your early adopters as they are more used to working in the cloud and sharing information, instead of attaching and emailing.

Adoption for a small to medium sized business is not that difficult and basic training may be no more than a few hours.



## Stop taking the path of least resistance.

Getting the SharePoint environment right before migrating a client will bring long-term benefits to the client and to those providing support.

The path of least resistance is not a quick win.

It is a path to building long term support issues. A path to restricting the flexibility and adaptability of the client's business. And a path to introducing unnecessary and maybe unacceptable risk.

Is this really the marketing message you want to deliver to your existing and potential clients?

Choosing a better path will lead to significantly better outcomes for your clients and will ultimately make your Microsoft 365 services more valuable, to your clients and to your business.

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