GRAVITY UNION

How to manage your SharePoint and Microsoft 365 collaboration rollout

A Gravity Union Webinar

www.gravityunion.com

Housekeeping

1. Use the Q&A panel to ask questions or share comments
2. The recording will be sent out and posted on our YouTube channel

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What we'll cover today

- Definitions of Microsoft 365 **governed** vs. **ungoverned** models
- Scenarios and examples of each approach
- Process and sample project plan
- Finding a balance with governance that takes into account compliance, security and privacy needs

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Introductions

Jas Shukla

Senior Consultant

- 15 years experience in enterprise technology consulting
- Previously with Microsoft on the SharePoint product team
- UX designer in a previous life

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Michael Schweitzer

President and CEO

- 20 years of enterprise technology experience
- Microsoft and Collabware certified
- Collabware MVP recipient
- Vancouver Office 365 user group board member
- ARMA Canada guest speaker
- Collabware User Group Board Member
- SharePoint Saturdays guest speaker
- Over 100 SharePoint ECM projects completed

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Who we are

A boutique compliance-inspired services firm helping organization in their digital transformation journey

Microsoft Partner

Gold Cloud Productivity
Gold Collaboration and Content
Gold Project and Portfolio Management

Gold Certified

Collabware Partner

collabware

Best Workplaces in British Columbia
Great Place To Work. CANADA 2021

Best Workplaces™ for Start-Ups
Great Place To Work. CANADA 2022

Great Place To Work. Certified
SEP 2021 – AUG 2022
CANADA

Microsoft Viva and Content Services Partner

- One of a few companies in Canada in the program
- Recognized by Microsoft for the success we deliver to customers with Microsoft Content Services technology
- Partner with Microsoft, providing feedback on the product functionality and roadmap
- Special support from Microsoft for our project work

Experience Overview

60+
Years of combined Collabware experience

50,000+
Users using our SharePoint and M365 solutions

40+
Microsoft certifications

30+
Collabware and Collabspace projects

10+
Years of average SharePoint experience across our team

18
Collabware certified consultants

100+
Million documents migrated and managed in our solutions

100%
Project success rate

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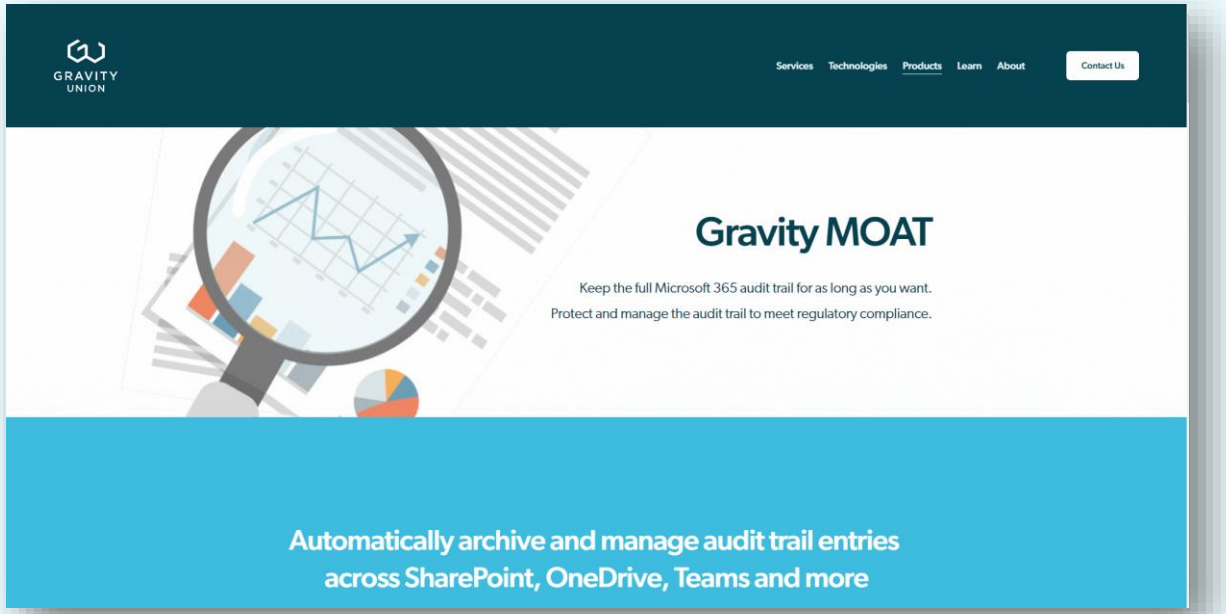
Makers of MOAT (M365 Audit Trail)

- World's first compliance-based audit trail back-up for Office 365



- https://www.gravityunion.com/moat

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What is a governed vs. ungoverned model?

We're asking the questions

Do we let end users build their **own** sites (without controls, rules, guidance)?

Or do we build a site **for** end users (with best practices, design patterns, processes)?

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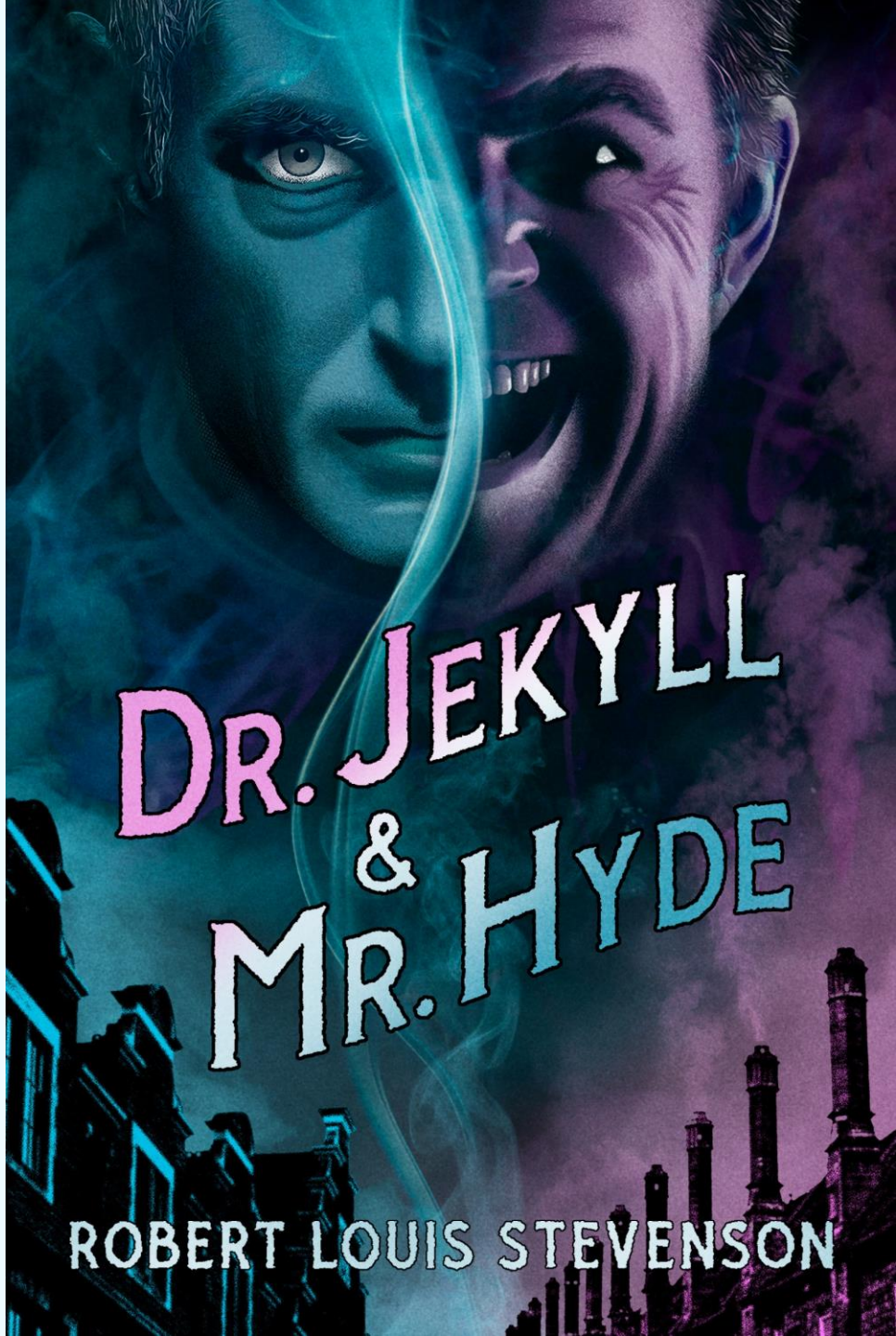
The two personalities of SharePoint

The DNA of SharePoint is both ungoverned and governed, decentralized and centralized



Decentralized approach (ungoverned)

A decentralized model allows users to freely create Teams, SharePoint and Microsoft 365 resources as needed.

Benefits

- ✓ Quick to market
- ✓ Low cost (upfront)

Drawbacks

- Lack of consistency
- Potential high cost over the long-run
- Usability issues as content scales
- Potential lower value over the long-term
- Increased solution volatility

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Centralized approach (governed)

A centralized model involves upfront planning to design reusable solution components for SharePoint, Teams and Microsoft 365 resources.

Benefits

- ✓ More consistency
- ✓ Easier to use
- ✓ Lower cost over the long-run
- ✓ More stable solution
- ✓ Downstream effort focuses on added value activities

Drawbacks

- Slower to market
- Higher upfront cost

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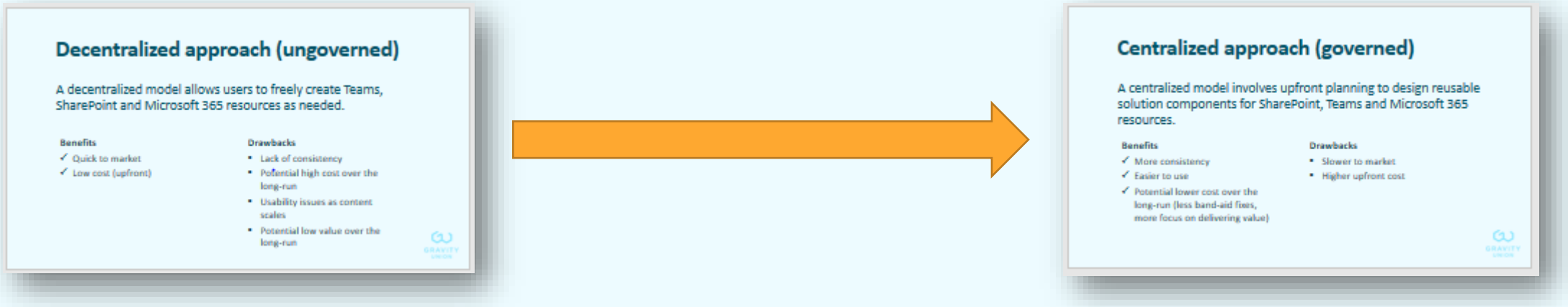
It's on a spectrum...



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Scenarios and examples

Ungoverned case study #1

- An organization was ransom-wared, and they had to quickly save on-premises content somewhere
- They put the entire organization's content into a single OneDrive account
- They quickly ran into security and scalability issues

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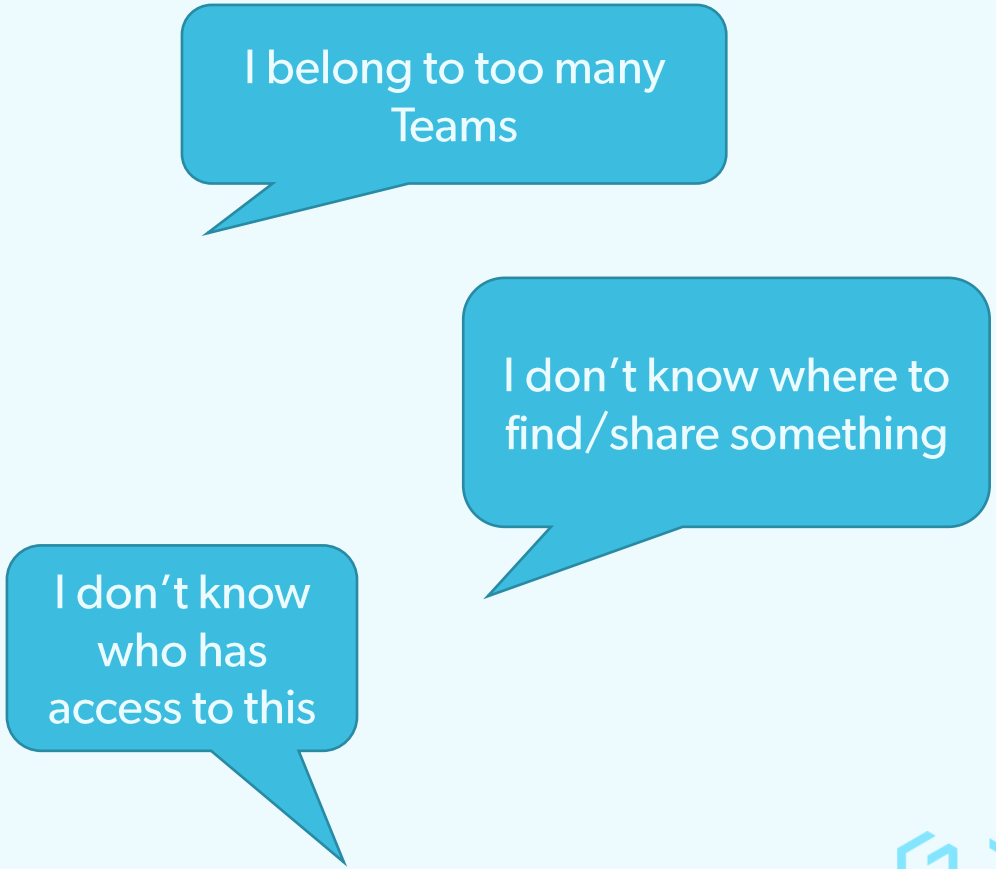
Ungoverned case study #2

- In many organizations, Teams is rolled out to enable remote work
- This quickly leads to “Teams sprawl” as anyone can create new Teams, Groups and Sites
- Usability and consistency issues over time



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Ungoverned case study #3

- SharePoint 2016 was released to the organization with little to no planning, training, guidance
- Ended up with a messy SharePoint solution that end users found frustrating to use and avoided using it
- Significant effort from IT to fix problems on the platform
- Little budget left over to add value (Workflows, Integration, Records Management, Reporting)
- Ended up moving to a different platform (it wasn't the platform's fault)
- Now moving into SharePoint Online and trying it again
- Would have been cheaper to take a governed approach

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When M365 is ungoverned, we typically see:

- Time to market\initial cost as priorities
- Cost and sustainment over the long-term is not considered
- Compliance and security requirements not being met
- Usability issues and slowing user adoption
- More solution volatility with break-fix changes instead of added-value solutions

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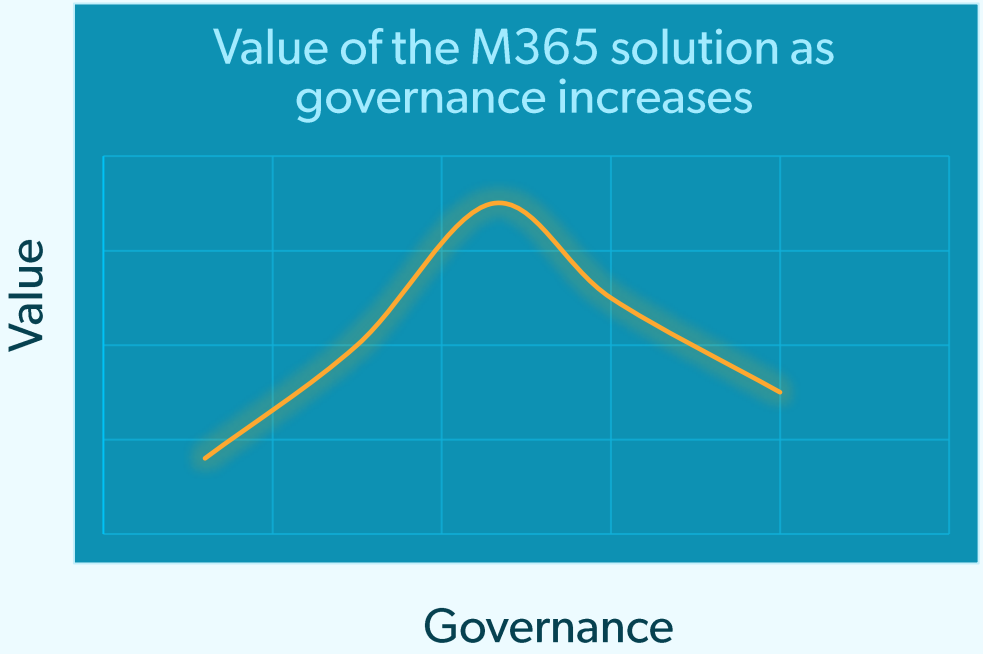
M365 Maturity Model



- The more you govern, the more value, up to a point
- Not every type of site needs the same governance e.g. projects, community of practice
- It's worth spending time on governance for critical content that has higher degree of importance or longer life

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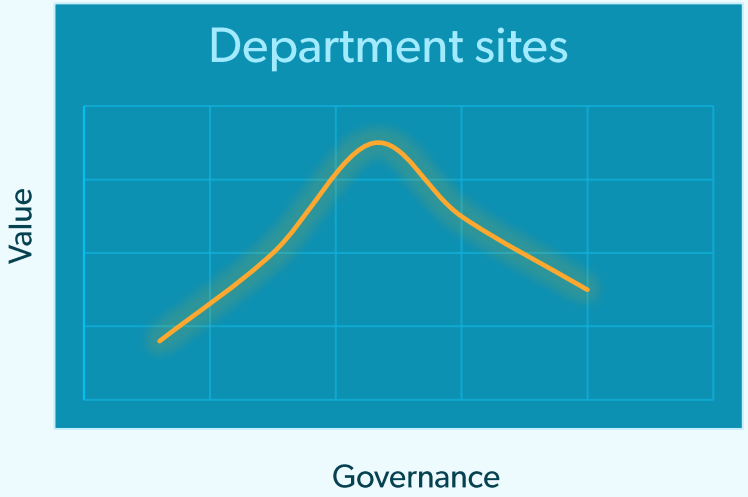
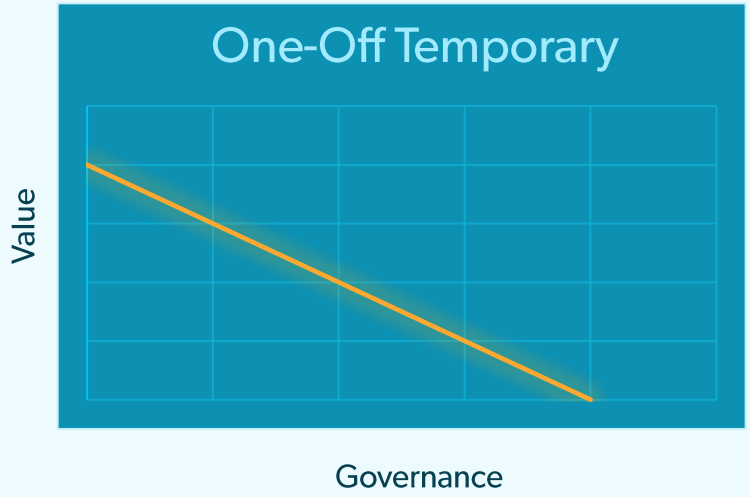
It’s not one-size-fits all





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Example #1

Department listing

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Department list

- It’s common for an organization to require a standardized and centralized list of departments for reuse within lists, libraries, forms, etc.
- Benefits: consistency, productivity

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Without a governed approach

- Many (12's? 100's?) lists of departments across the organization
- How do we search? (IT, it, Information Tech, Information Technology, Computer People)
- How do we maintain? (How to add and rename departments)

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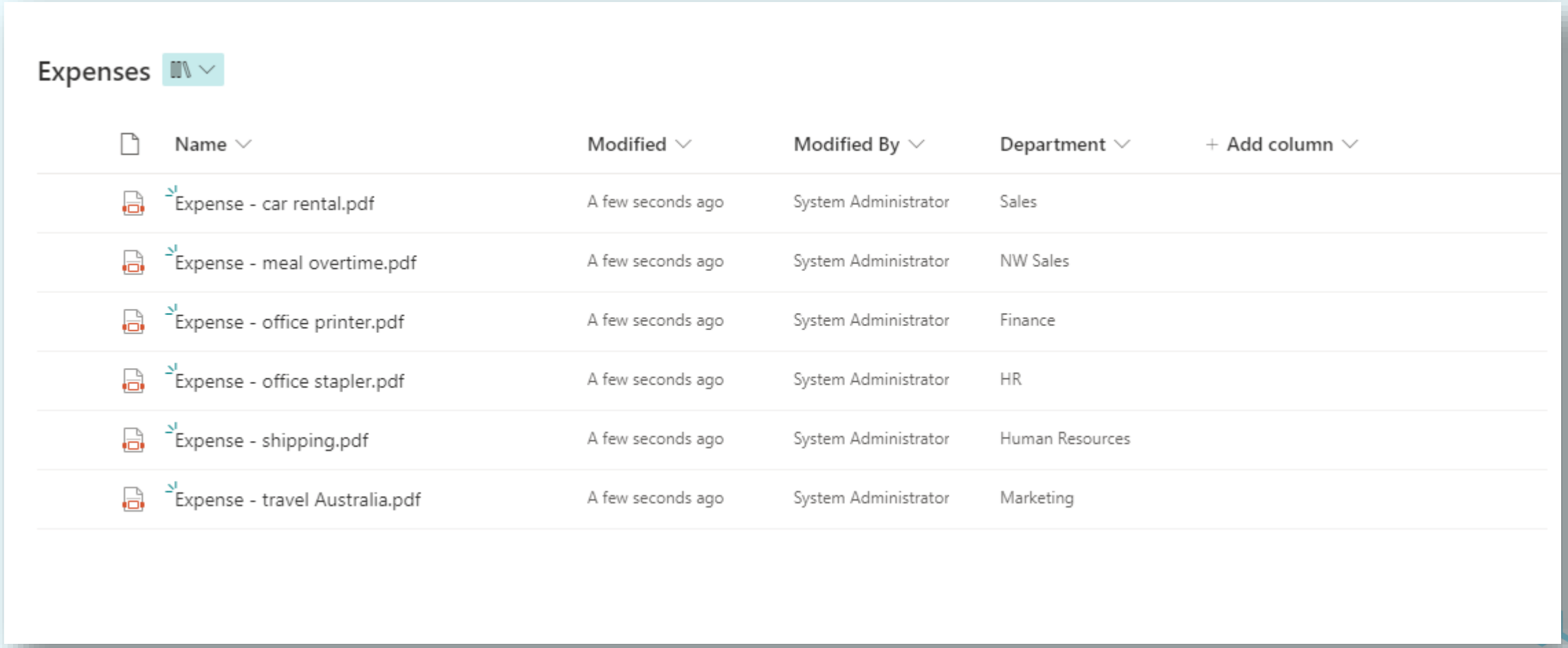
Plain text



Expenses

Name	Modified	Modified By	Department	+ Add column
Expense - car rental.pdf	A few seconds ago	System Administrator	Sales	
Expense - meal overtime.pdf	A few seconds ago	System Administrator	NW Sales	
Expense - office printer.pdf	A few seconds ago	System Administrator	Finance	
Expense - office stapler.pdf	A few seconds ago	System Administrator	HR	
Expense - shipping.pdf	A few seconds ago	System Administrator	Human Resources	
Expense - travel Australia.pdf	A few seconds ago	System Administrator	Marketing	

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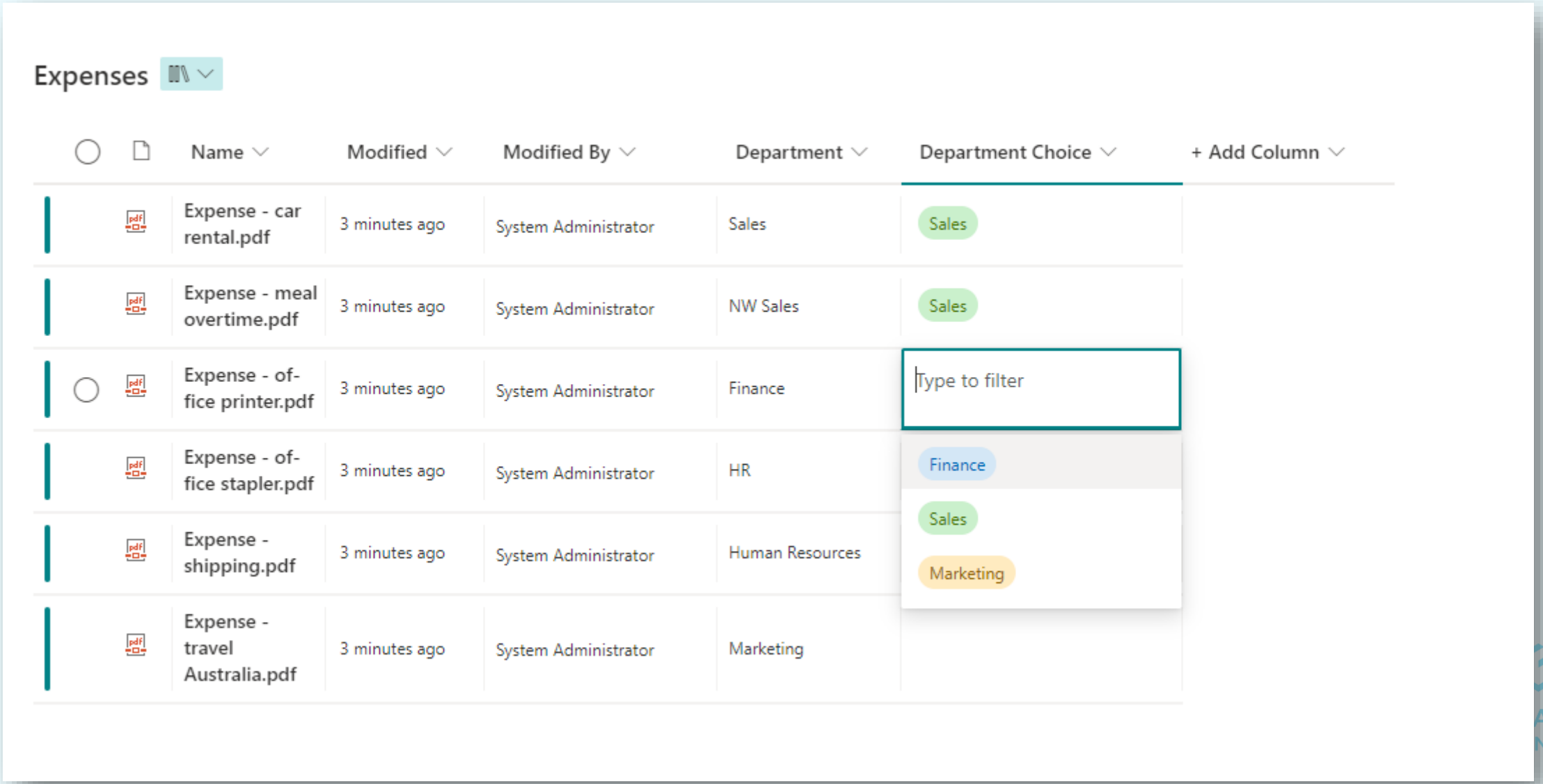
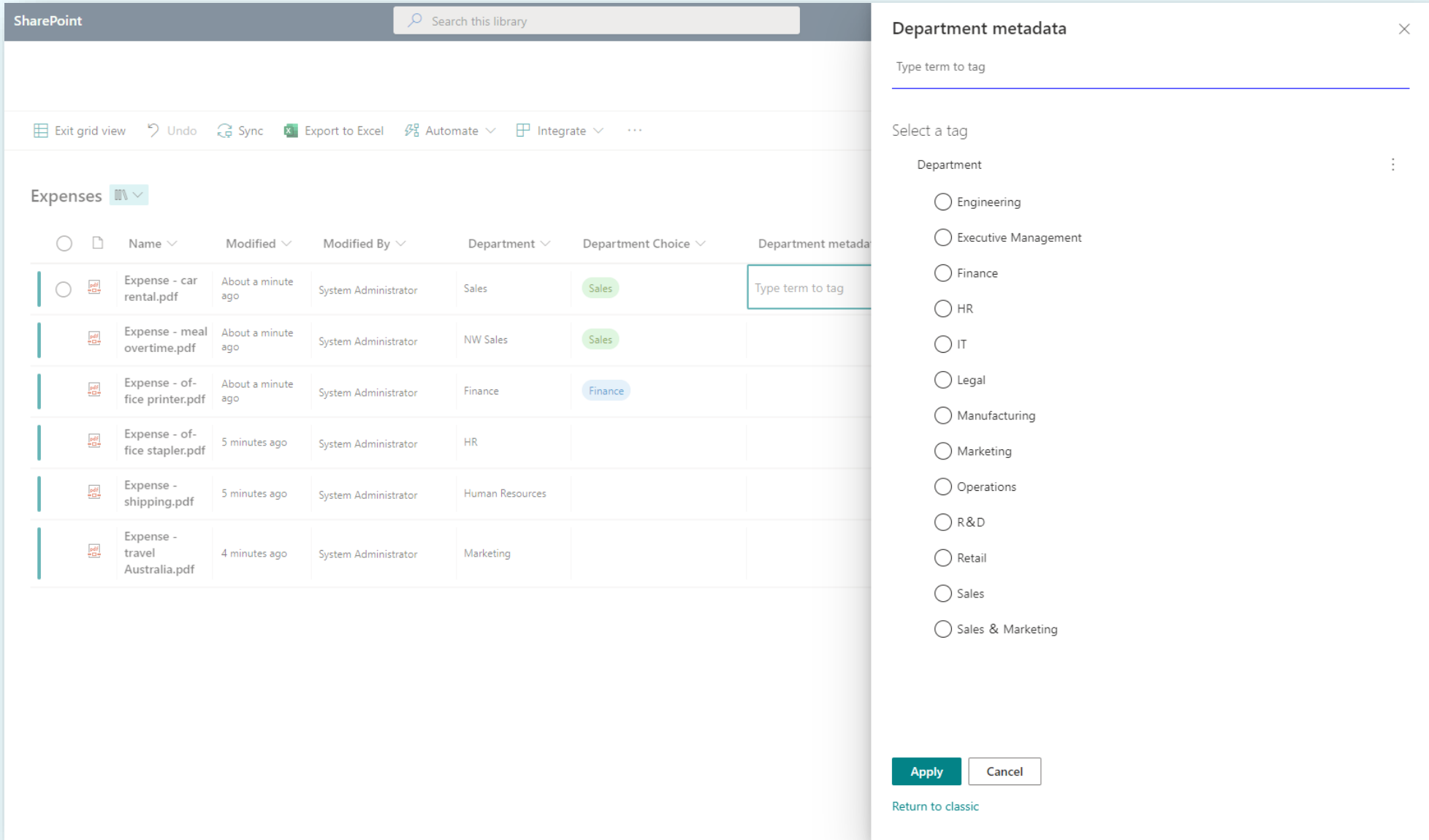
Choice list


Expenses
Name
Modified
Modified By
Department
Department Choice
+ Add Column
Expense - car rental.pdf
3 minutes ago
System Administrator
Sales
Sales
Expense - meal overtime.pdf
3 minutes ago
System Administrator
NW Sales
Sales
Expense - office printer.pdf
3 minutes ago
System Administrator
Finance
Type to filter
Expense - office stapler.pdf
3 minutes ago
System Administrator
HR
Finance
Sales
Marketing
Expense - shipping.pdf
3 minutes ago
System Administrator
Human Resources
Expense - travel Australia.pdf
3 minutes ago
System Administrator
Marketing

Metadata


SharePoint
Search this library
Exit grid view
Undo
Sync
Export to Excel
Automate
Integrate
Expenses
Name
Modified
Modified By
Department
Department Choice
Department metadata
Expense - car rental.pdf
About a minute ago
System Administrator
Sales
Sales
Type term to tag
Expense - meal overtime.pdf
About a minute ago
System Administrator
NW Sales
Sales
Expense - office printer.pdf
About a minute ago
System Administrator
Finance
Finance
Expense - office stapler.pdf
5 minutes ago
System Administrator
HR
Expense - shipping.pdf
5 minutes ago
System Administrator
Human Resources
Expense - travel Australia.pdf
4 minutes ago
System Administrator
Marketing
Department metadata
Type term to tag
Select a tag
Department
Engineering
Executive Management
Finance
HR
IT
Legal
Manufacturing
Marketing
Operations
R&D
Retail
Sales
Sales & Marketing
Apply
Cancel
Return to classic

Home
Sites
Active sites
Deleted sites
Policies
Settings
Content services
Term store
Content type gallery
Migration
Reports
Advanced
More features
Customize navigation
Show all

Term store

Search terms

Taxonomy
People
Department
Engineering
Executive Management
Finance
HR
IT
Legal
Manufacturing
Marketing
Operations
R&D
Retail
Sales
Sales & Marketing

Add term | Rename term set | Delete term set | Copy term set | Move term set

Department Edit

Add a description to help users understand the purpose of this term set.

General | Usage settings | Navigation | Advanced

Owner Edit

Add people who will maintain this termset.

Stakeholders

Add people who have an accountabilty in maintaining this term set.

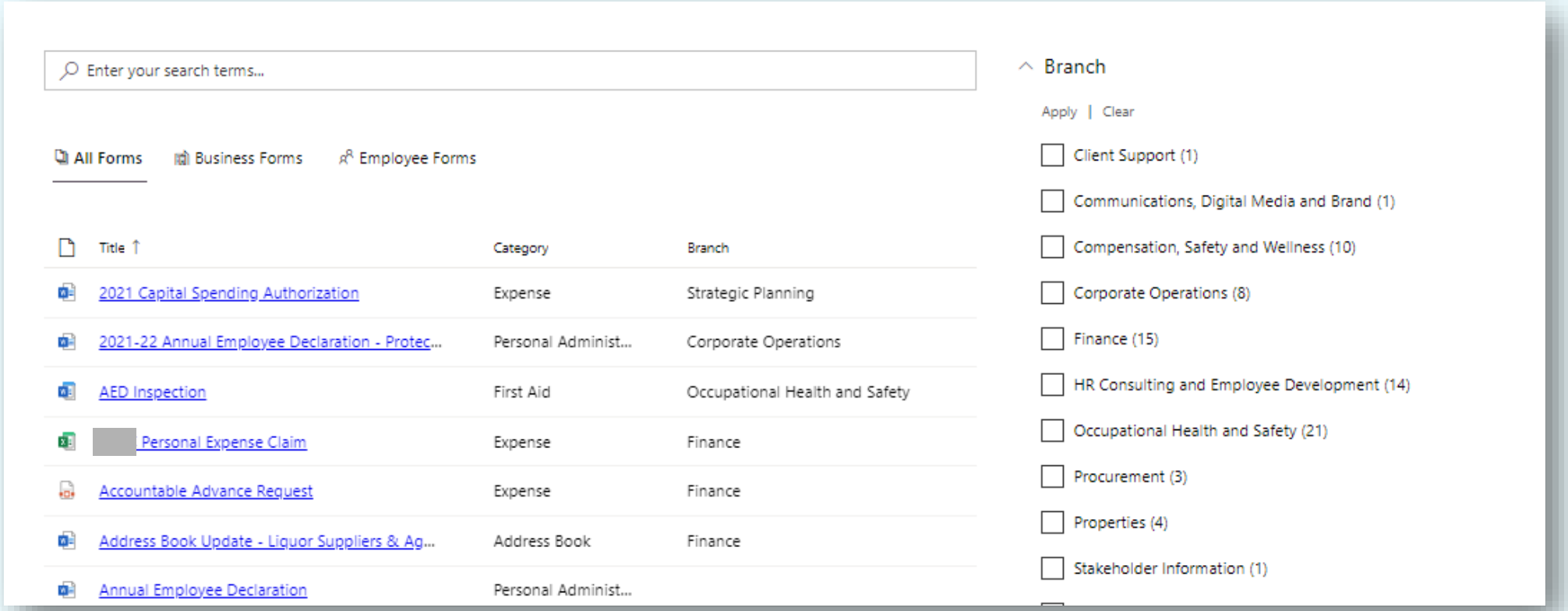
Contact

Add a contact for this term set.

Unique identifier Copy

8ed8c9ea-7052-4c1d-a4d7-b9c10bffea6f

Search and filter



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Example #2

Policies solution

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Policies & Procedures

- If you leave it up to departments, everyone will design different solutions
- Some will manage policies in folders, separate document libraries, or one flat library

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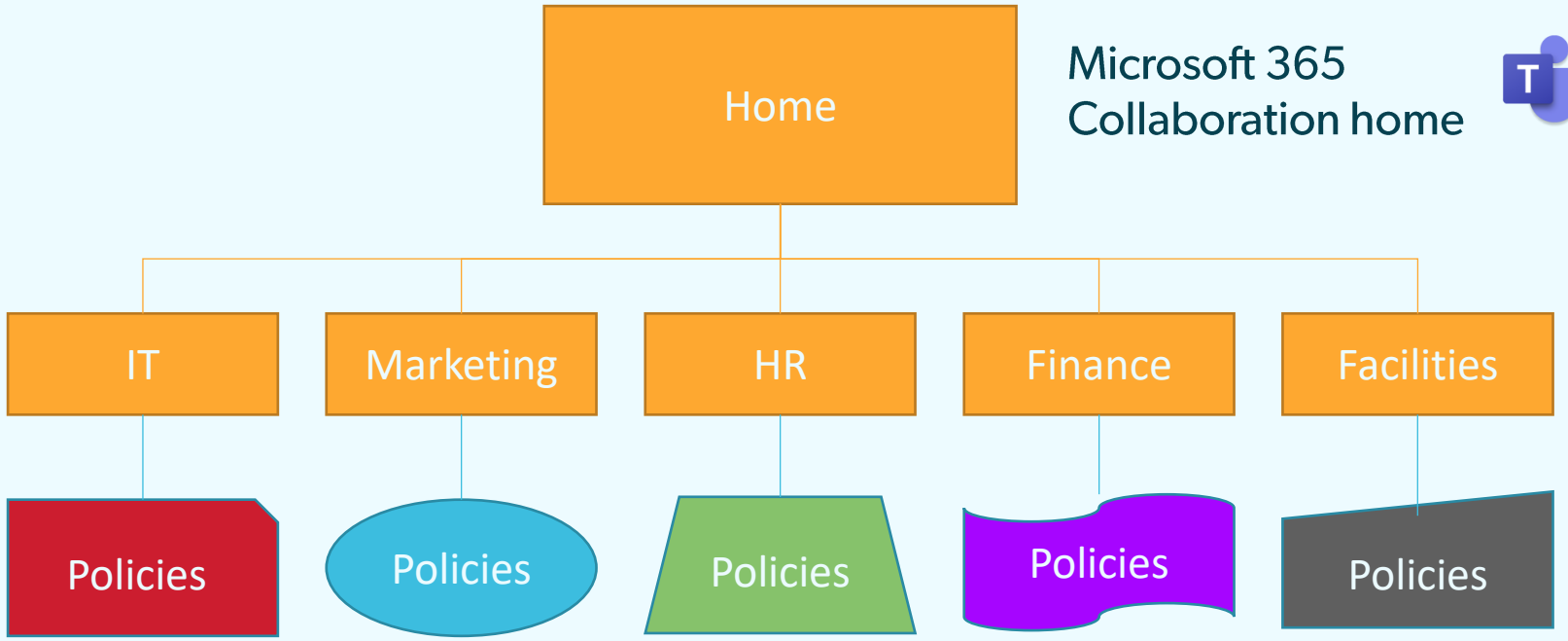
An ungoverned solution



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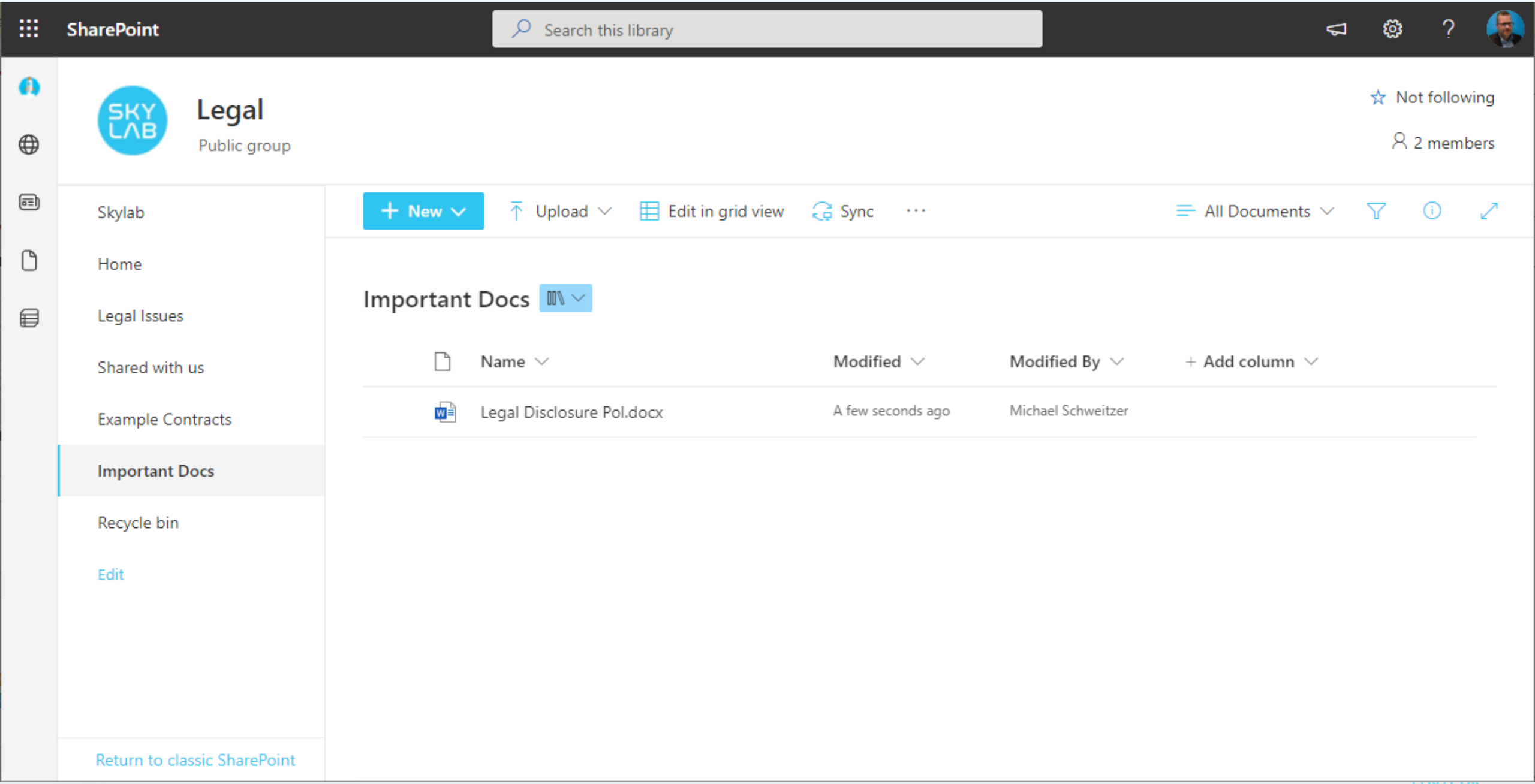
SharePoint
Search this library
Legal
Public group
Not following
2 members
Skylab
Home
Legal Issues
Shared with us
Example Contracts
Important Docs
Recycle bin
Edit
Return to classic SharePoint
New
Upload
Edit in grid view
Sync
All Documents
Important Docs
Name
Modified
Modified By
Add column
Legal Disclosure Pol.docx
A few seconds ago
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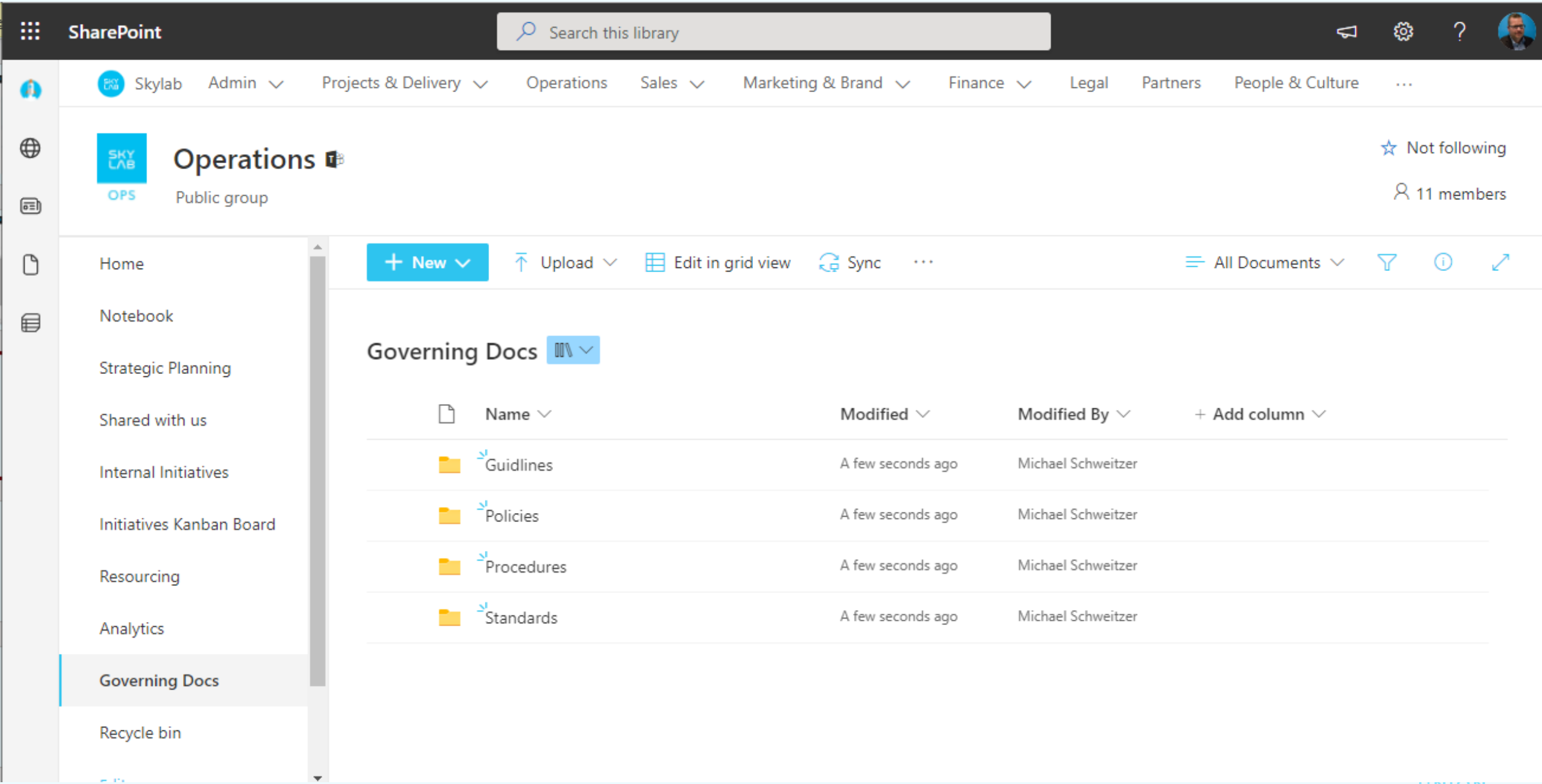
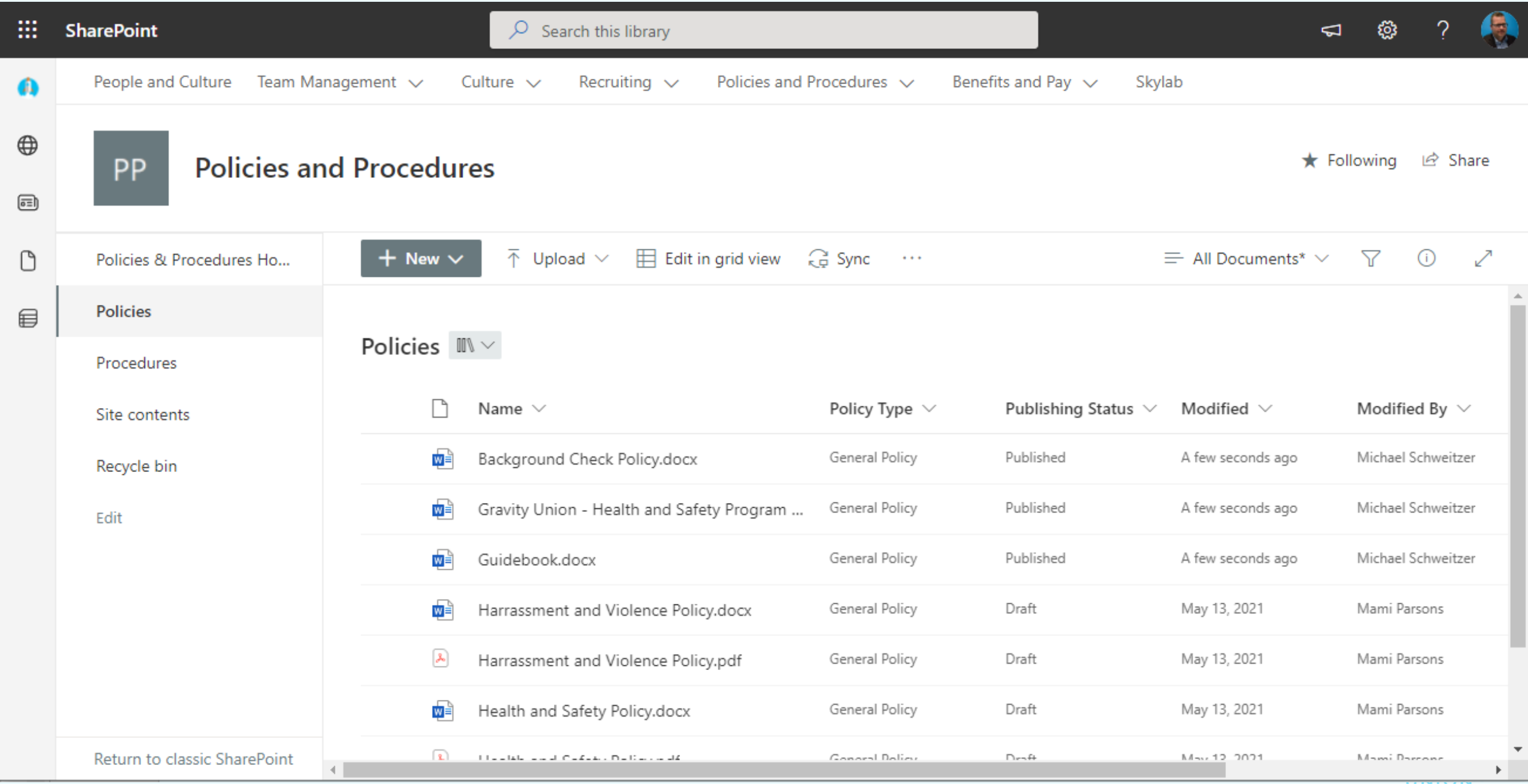

SharePoint
Search this library
Skylab
Admin
Projects & Delivery
Operations
Sales
Marketing & Brand
Finance
Legal
Partners
People & Culture
SKY LAB
OPS
Operations
Public group
Not following
11 members
Home
Notebook
Strategic Planning
Shared with us
Internal Initiatives
Initiatives Kanban Board
Resourcing
Analytics
Governing Docs
Recycle bin
New
Upload
Edit in grid view
Sync
All Documents
Governing Docs
Name
Modified
Modified By
Add column
Guidlines
A few seconds ago
Michael Schweitzer
Policies
A few seconds ago
Michael Schweitzer
Procedures
A few seconds ago
Michael Schweitzer
Standards
A few seconds ago
Michael Schweitzer


SharePoint
Search this library
People and Culture
Team Management
Culture
Recruiting
Policies and Procedures
Benefits and Pay
Skylab
PP
Policies and Procedures
Following
Share
Policies & Procedures Ho...
Policies
Procedures
Site contents
Recycle bin
Edit
Return to classic SharePoint
New
Upload
Edit in grid view
Sync
All Documents*
Policies
Name
Policy Type
Publishing Status
Modified
Modified By
Background Check Policy.docx
General Policy
Published
A few seconds ago
Michael Schweitzer
Gravity Union - Health and Safety Program ...
General Policy
Published
A few seconds ago
Michael Schweitzer
Guidebook.docx
General Policy
Published
A few seconds ago
Michael Schweitzer
Harrassment and Violence Policy.docx
General Policy
Draft
May 13, 2021
Mami Parsons
Harrassment and Violence Policy.pdf
General Policy
Draft
May 13, 2021
Mami Parsons
Health and Safety Policy.docx
General Policy
Draft
May 13, 2021
Mami Parsons

Description:

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

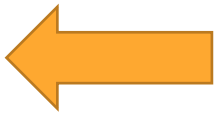
Permissions and Management

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage files which have no checked in version
- Workflow Settings
- Apply label to items in this list or library
- Enterprise Metadata and Keywords Settings

Content Types

This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other

Content Type	Visible on New Button
Policy	✓
Document	



- Add from existing site content types
- Change new button order and default content type

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is re
available in this document library:

Column (click to edit)	Type	Used in

SharePoint

contenttype:policy

All | Files | Sites | People | News | Images | Power BI | Learning

Feedback

Filters | File type | Last modified

Working Remotely

Policies and Procedures › Policies

Mami Shimada Parsons modified on October 18, 2021

Working Remotely Policy Please note that working remotely is an exception, not the norm. Please come and talk to us first, as we

Background Check Policy

Policies and Procedures › Policies

Michael Schweitzer modified on July 7, 2021

Background Check Policy Background Check Policy Internal Use | July 7, 2021 Version 1.9 Background Check Policy Internal Use | July 7, 2021

Gravity Union - Health and Safety Program (2019)

Policies and Procedures › Policies

Michael Schweitzer modified on November 12, 2019

Gravity Union Health and Safety Program (2019) SharePoint | Office 365 | Collabware | Collabspace www.gravityunion.com

Health and Safety Policy

Policies and Procedures › Policies

Mami Shimada Parsons modified on May 13, 2021

Health and Safety Policy Health and Safety Policy...

Harrassment and Violence Policy

Policies and Procedures › Policies

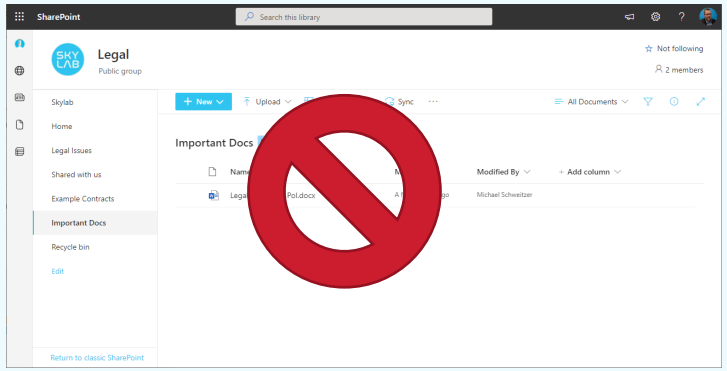
Mami Shimada Parsons modified on May 13, 2021 • 7 views

Harassment and Violence Policy Harassment and Violence Policy...

Health and Safety Policy

Policies and Procedures › Policies

What did we find?



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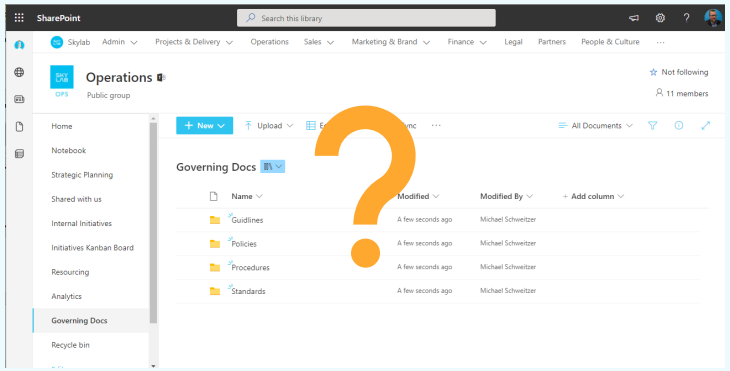
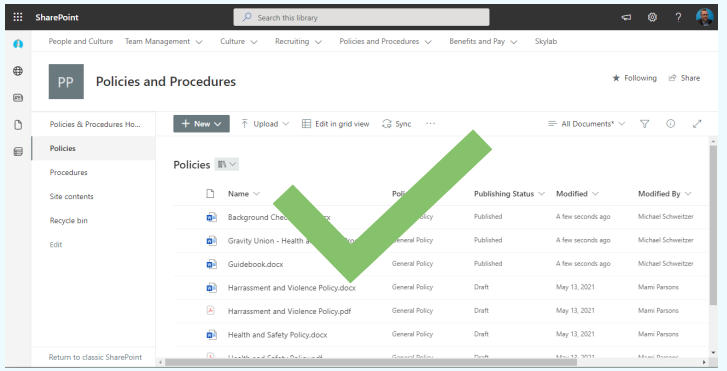


Operations



Human Resources

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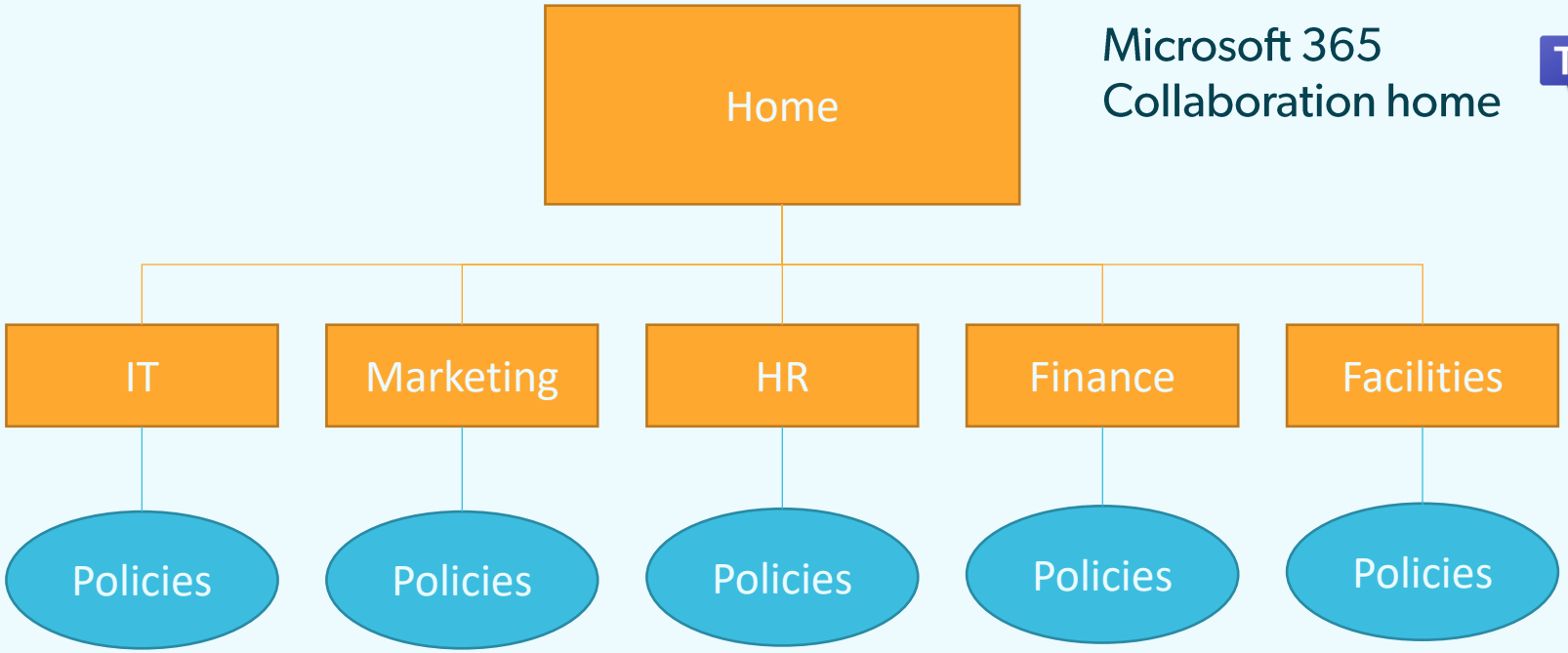
A reusable solution



Microsoft 365
Collaboration home

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SharePoint

contenttype:policy

All | Files | Sites | People | News | Images | Power BI | Learning

Feedback

Filters | File type | Last modified

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ContentType:Policy

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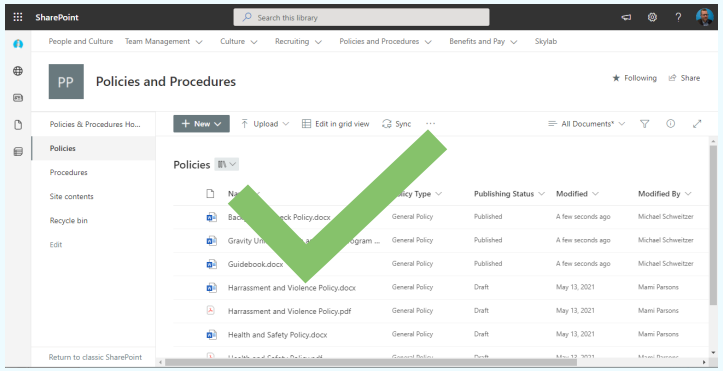

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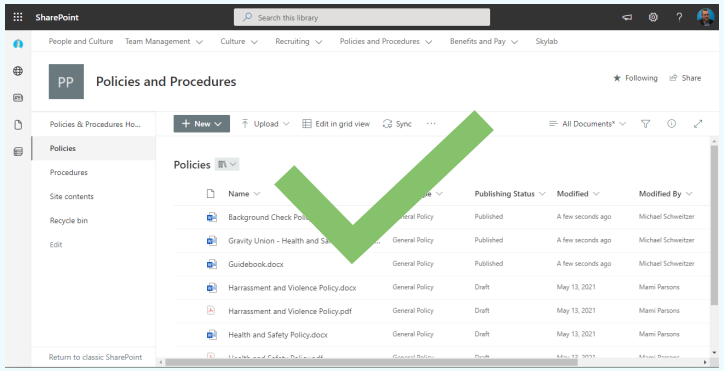
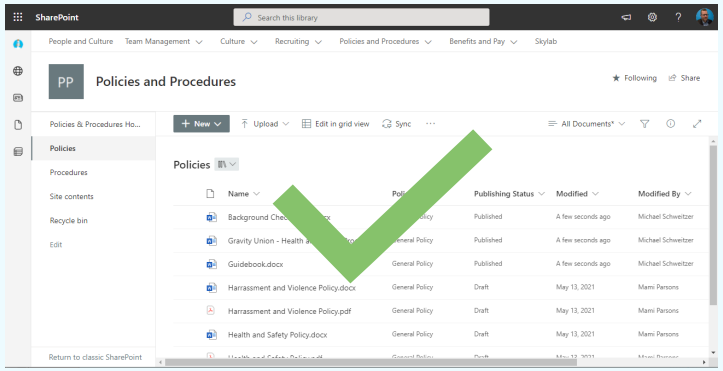


Operations



Human Resources

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Home
Compliance Manager
Data classification
Data connectors
Alerts
Reports
Policies
Permissions
Trials

Solutions

Catalog
App governance
Audit
Content search
Communication compliance
Data loss prevention
eDiscovery
Core
Advanced
User data search
Information governance
Information protection

Core eDiscovery

Remove from navigation

After creating an eDiscovery case and choosing who has access to it, use the case to search for email, documents, Skype for Business conversations, Teams data, and other content in your organization. You can then preserve the content and export the search results for further analysis. Learn more

Create a case | Download list | Refresh | 2 items | Search | Group | Filter | Customize columns

Name	Status	Created date	Last modified	Last modified by
Mining Company	Closed	Jun 10, 2017 8:15 PM	Mar 7, 2019 5:34 PM	Michael Schweitzer
Michael Schweitzer	Active	Nov 10, 2018 7:44 AM	Nov 10, 2018 7:44 AM	Michael Schweitzer

Microsoft 365 compliance

New search

- Name and description
- Locations
- **Conditions**
- Review your search

Define your search conditions

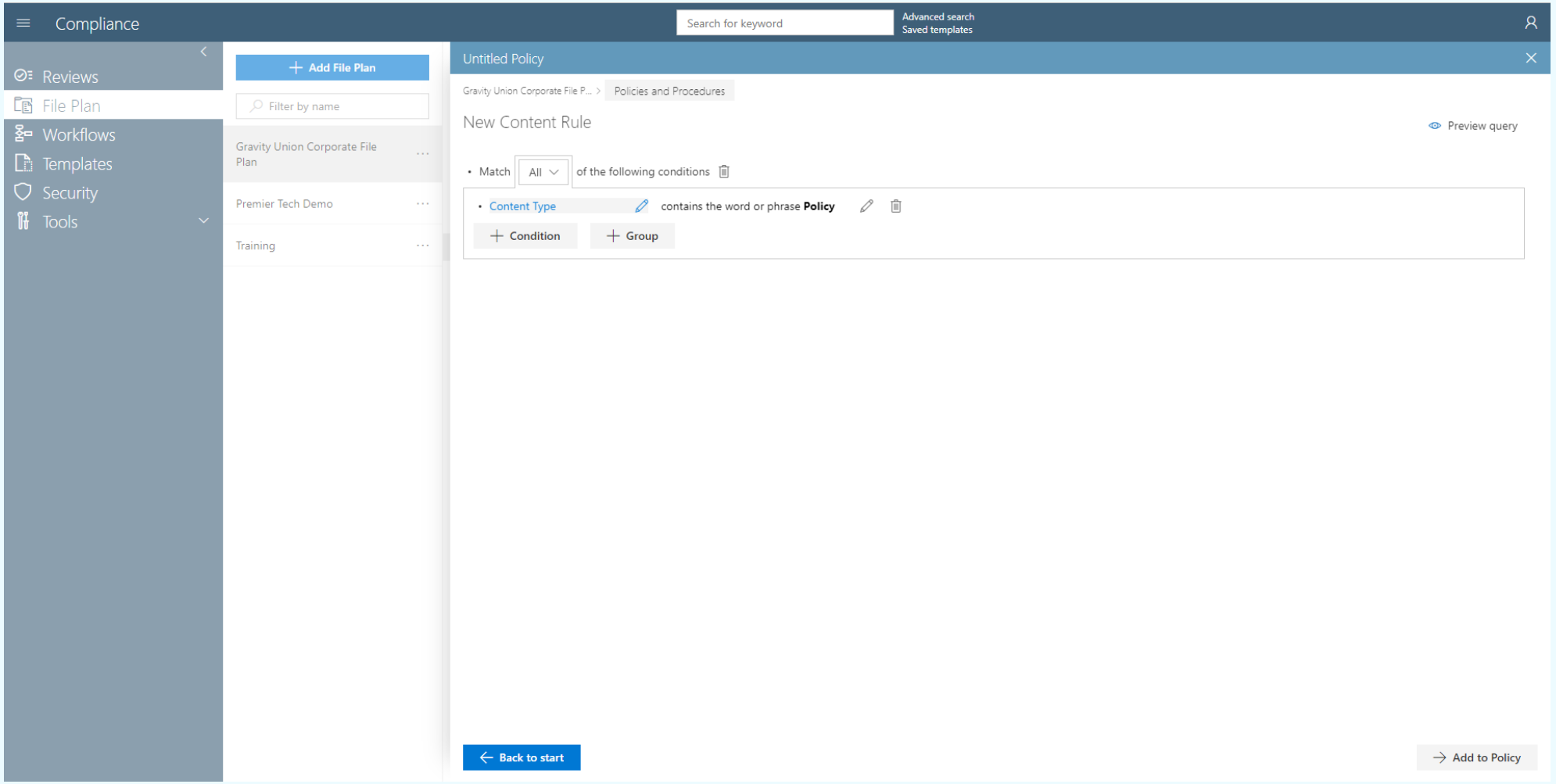
Query language-country/region: None

- ( ) Condition card builder
- (•) KQL editor

```
ContentType:Policy
```

0 errors detected

With a governed solution



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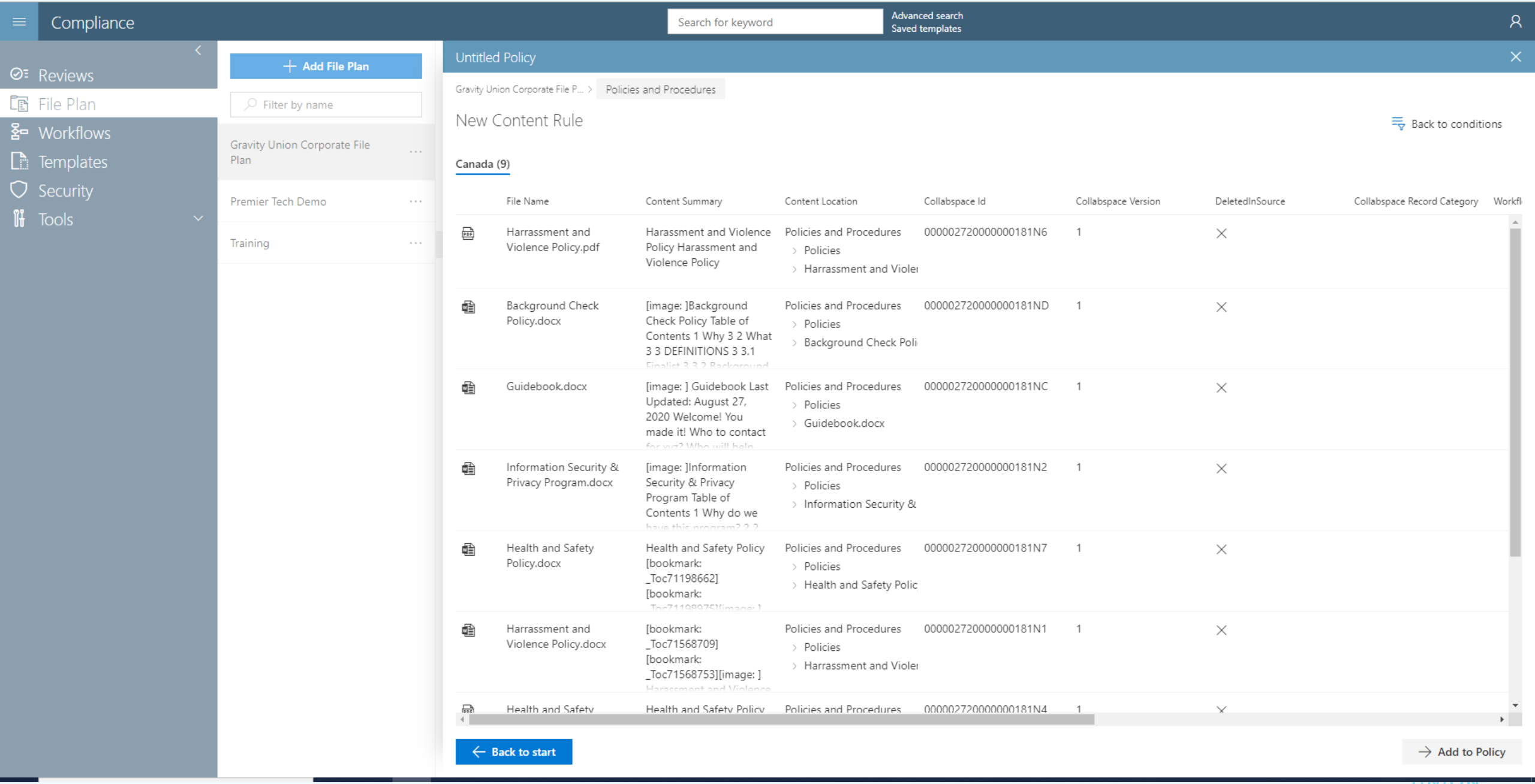
Compliance
Search for keyword
Advanced search
Saved templates
Reviews
File Plan
Workflows
Templates
Security
Tools
Add File Plan
Filter by name
Gravity Union Corporate File Plan
Premier Tech Demo
Training
Untitled Policy
Gravity Union Corporate File P...
Policies and Procedures
New Content Rule
Back to conditions
Canada (9)
File Name
Content Summary
Content Location
Collabspace Id
Collabspace Version
DeletedInSource
Collabspace Record Category
Harrassment and Violence Policy.pdf
Harassment and Violence Policy Harassment and Violence Policy
Policies and Procedures
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Harrassment and Violer
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Policies and Procedures
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Policies and Procedures
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Information Security & Privacy Program.docx
[image:]Information Security & Privacy Program Table of Contents 1 Why do we
Policies and Procedures
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Policies and Procedures
Policies
Harrassment and Violer
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1
Health and Safety
Health and Safety Policy
Policies and Procedures
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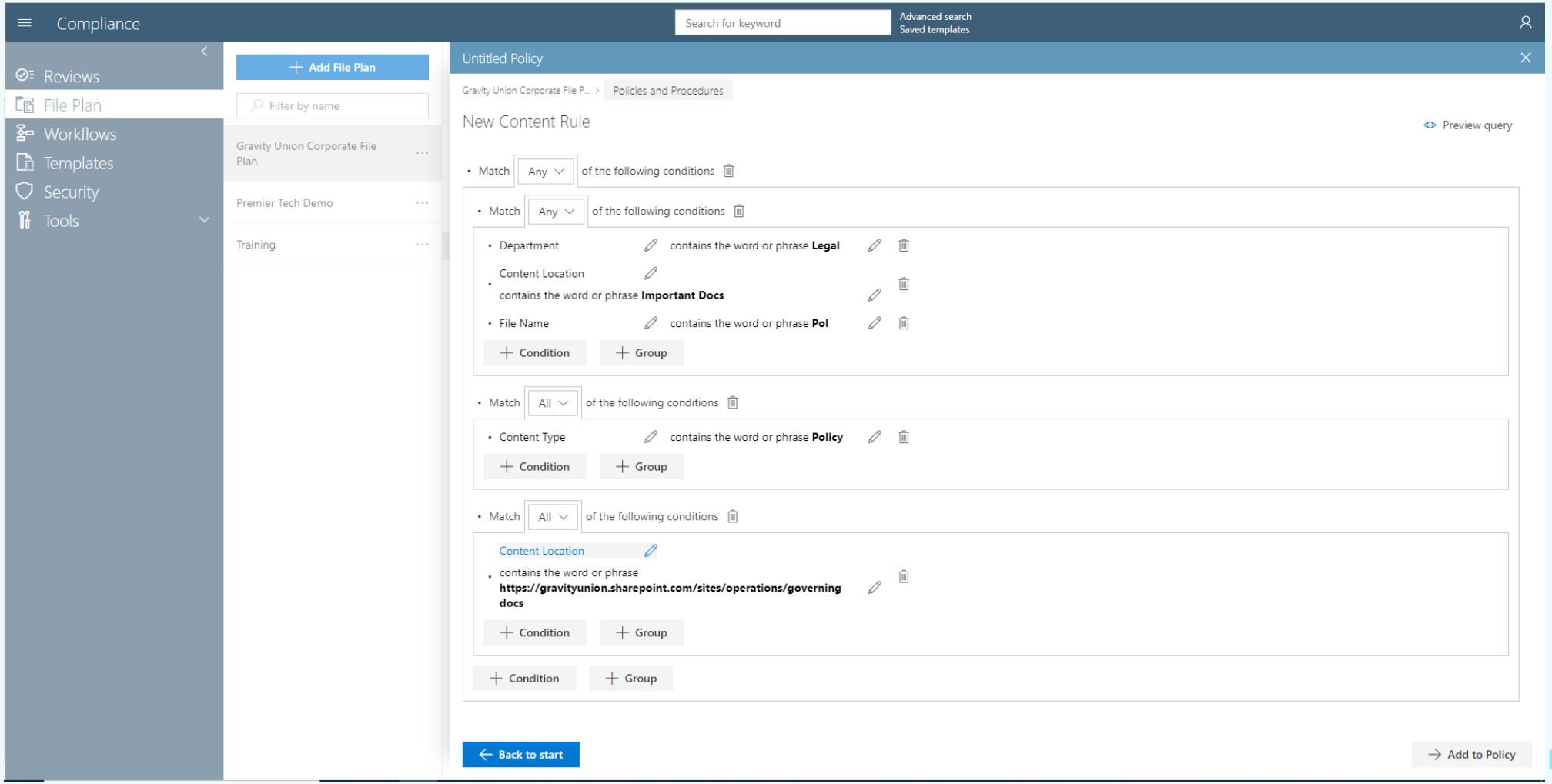
1
Back to start
Add to Policy

Without a governed solution



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Benefits

- Consistent user experience
- Cost savings when deploying the solution to departments
- Easier to search\find regardless of location
- Create cross departmental solutions (policies portal)
- More easily apply value-add solutions like Records Management
- More workflow reuse that targets the policy content type
- Easier to create reports (list of expired policies, unreviewed)

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Other Examples

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Contracts

- Ability to see and manage all contracts across the organization
- Manage records in a consistent way (storing all contracts for 7 years after the Contract end date)

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Vendors\Clients

- Managing a central list of clients and\or vendors
- Tagging related items (project, contracts, correspondence)

GRAVITY UNION

Mission Control - Home | Projects & Delivery - Projects - A

https://gravityunion.sharepoint.com/sites/ProjectHub/Lists/Projects/Active%20Projects.aspx

Not syncing

Timesheet – Gravity... | Skylab - Home | Sales - Home | CPSBC - Outlook | Mission Control - H... | Home - Microsoft 3... | Request Time Off | Dell

SharePoint

Search this list

Projects & Delivery | Project Directory | Client Directory | Delivery Resources | Skylab | Edit

SKY LAB

Projects & Delivery

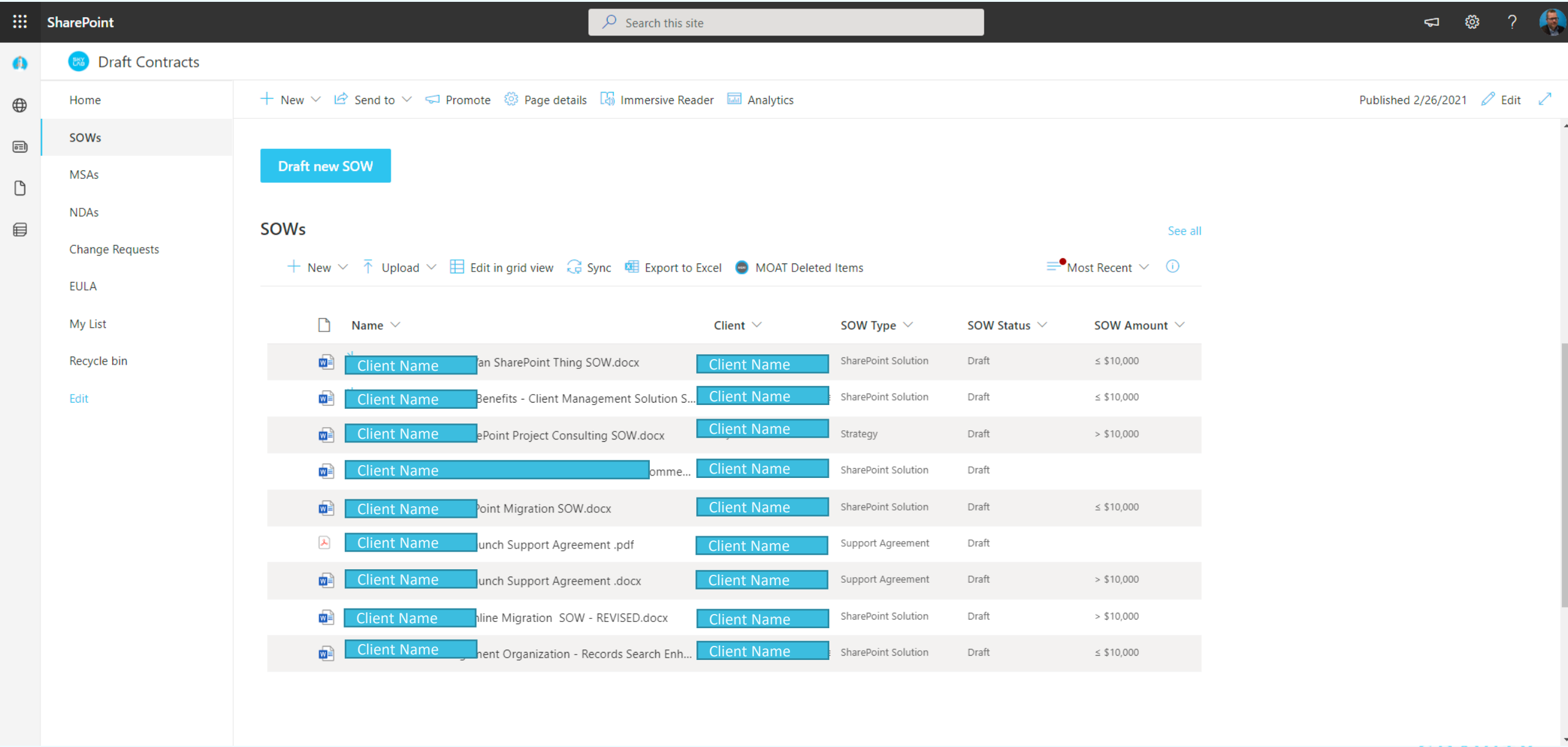
Project Management | Deliverables | Teams Documents | Advanced Project Search | Change Management | Strategy and Governance | Infrastructure | Rollout | Training | Client Resources | Edit

+ Create site | ☆ Not following | Share

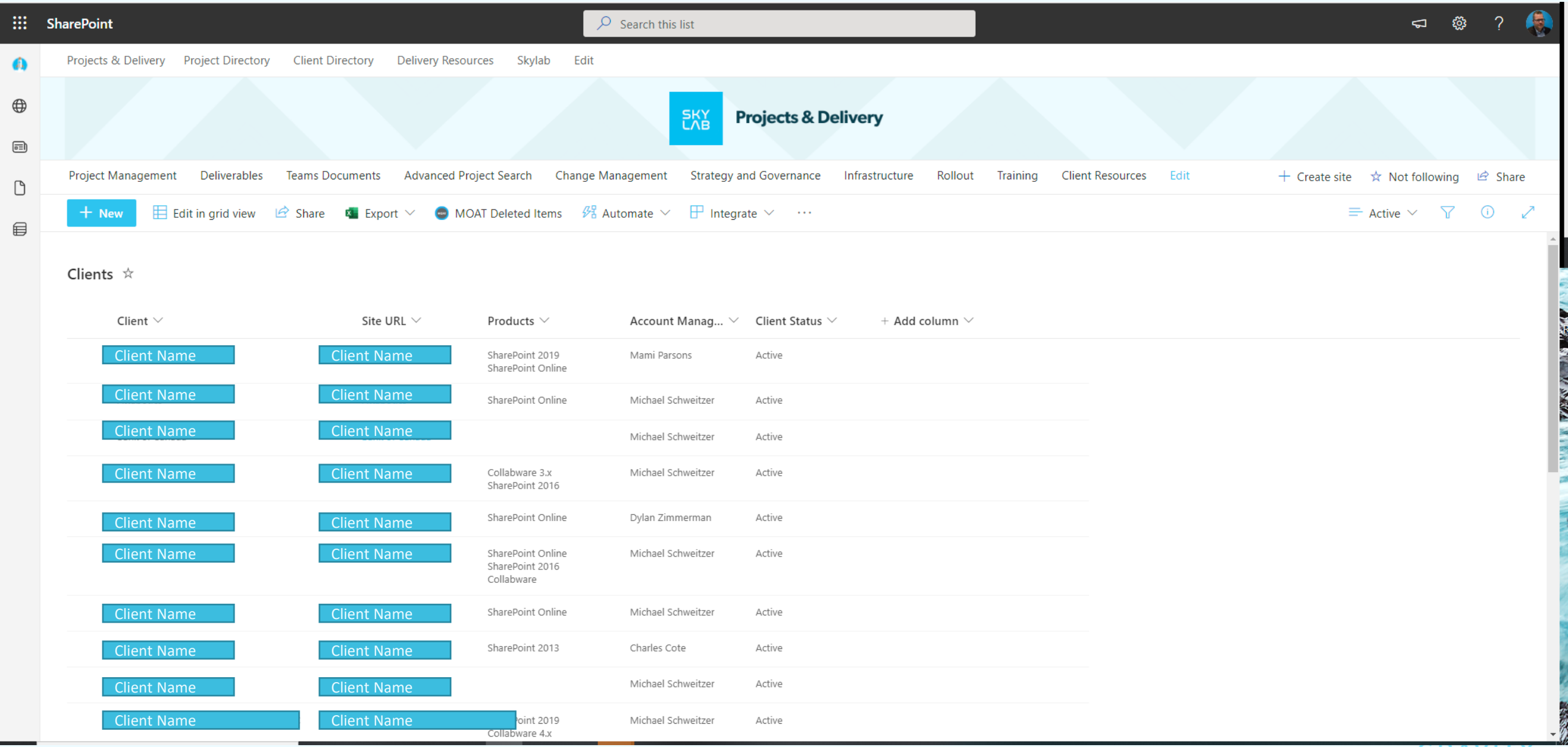
+ New | Edit in grid view | Share | Export | MOAT Deleted Items | Automate | Integrate | ... | Active Projects

Projects ☆

Client	Project Name	Site URL	Project Type	Project Status	PM	Budget	Start Date	End Date	% Complete	Schedule Sta
	Employee Portal Migration	https://gravityunion.sh...	Delivery - Enterprise	Active	Laura Bower				0 %	→ TBD
Client Name	SharePoint Design and Configuration Services	https://gravityunion.sh...	Delivery - Enterprise	Active	Matt James	$658,711	8/23/2021	3/31/2022	45 %	✓ Green
Client 2	M365 Support	https://gravityunion.sh...	Delivery - Small	Active	Giselle Borges	$29,025	8/12/2020		0 %	✓ Green
Client 3	EDRMS Planning M365	https://gravityunion.sh...	Delivery - Enterprise	Active	Matt James	$29,050	1/10/2022	4/15/2022	90 %	✓ Green
Client 4	Collaborative Digital Workplace Initiative		Delivery - Enterprise	Active	Matt James	$496,600	4/15/2022	4/30/2023	30 %	✓ Green



GRAVITY UNION



GRAVITY UNION

SharePoint

Search this site

Projects & Delivery | Project Directory | Client Directory | Delivery Resources | Skylab

A

Client Name

Not following | Share

Home

Notebook

Client Build

Sustainment

Recycle bin

Edit

New | Page details | Analytics

Published 12/9/2020 | Edit

Client

Projects

Project Name	Project Site	Status
Project 1	Site Link	Active
Project 2	Site Link	Closed
Project 3	Site Link	Closed
Project 4	Site Link	Closed
Project 5	Site Link	Closed

Contracts & Proposals

Title	Modified
Client rds Management	January 17, 2022
Client 024 Addendum 4.docx	September 29, 2021
Microsoft Platform	September 27, 2021
Client Addendum 3.docx	September 23, 2021
Client Addendum 2.docx	September 23, 2021
Client 4 Microsoft Platform Final - Annot...	September 22, 2021

Refine your results

Site Title

Proposals (65)

DraftContracts (15)

SignedContracts (3)

ProposalsGood (1)

Account Manager

Michael Schweitzer
CEO, Founder and Principal Consultant

Client Contact

Contact Name
Client phone

Client Resources

Remote Access

SharePoint Site

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Approach to governance

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Some planning is required

Upfront work involves:

- Define roles and responsibilities (what the project team does vs. what end users do)
- Make your key decisions upfront and express those decisions in guidelines, procedures etc.
- Automate where possible (site\Teams requests)
- Organize end users into bite-size chunks

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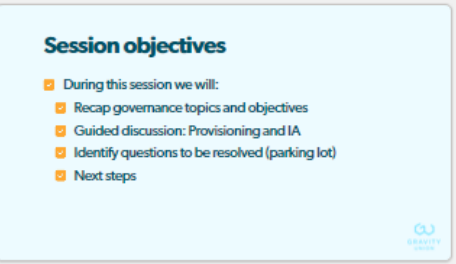
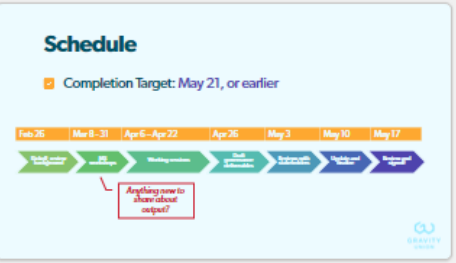
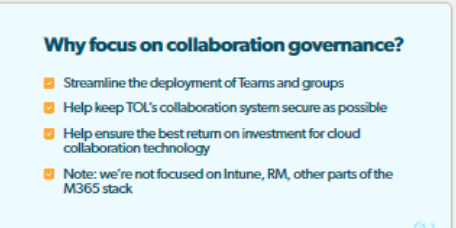
Teams Governance workshop







Questions to answer

Teams Provisioning

- What is the overall creation process - do we approve teams before they are created?
- What permissions and guest access are applied?
- What channels, tabs, libraries are available?
- What are the templates (if any)?
- What is the naming convention?

Teams Management and lifecycle

- How do we avoid sprawl and findability issues later?
- How do we ensure ownership over time?
- What are the records management implications?
- How do we close down inactive/archived teams?

GRAVITY UNION

Click to add notes

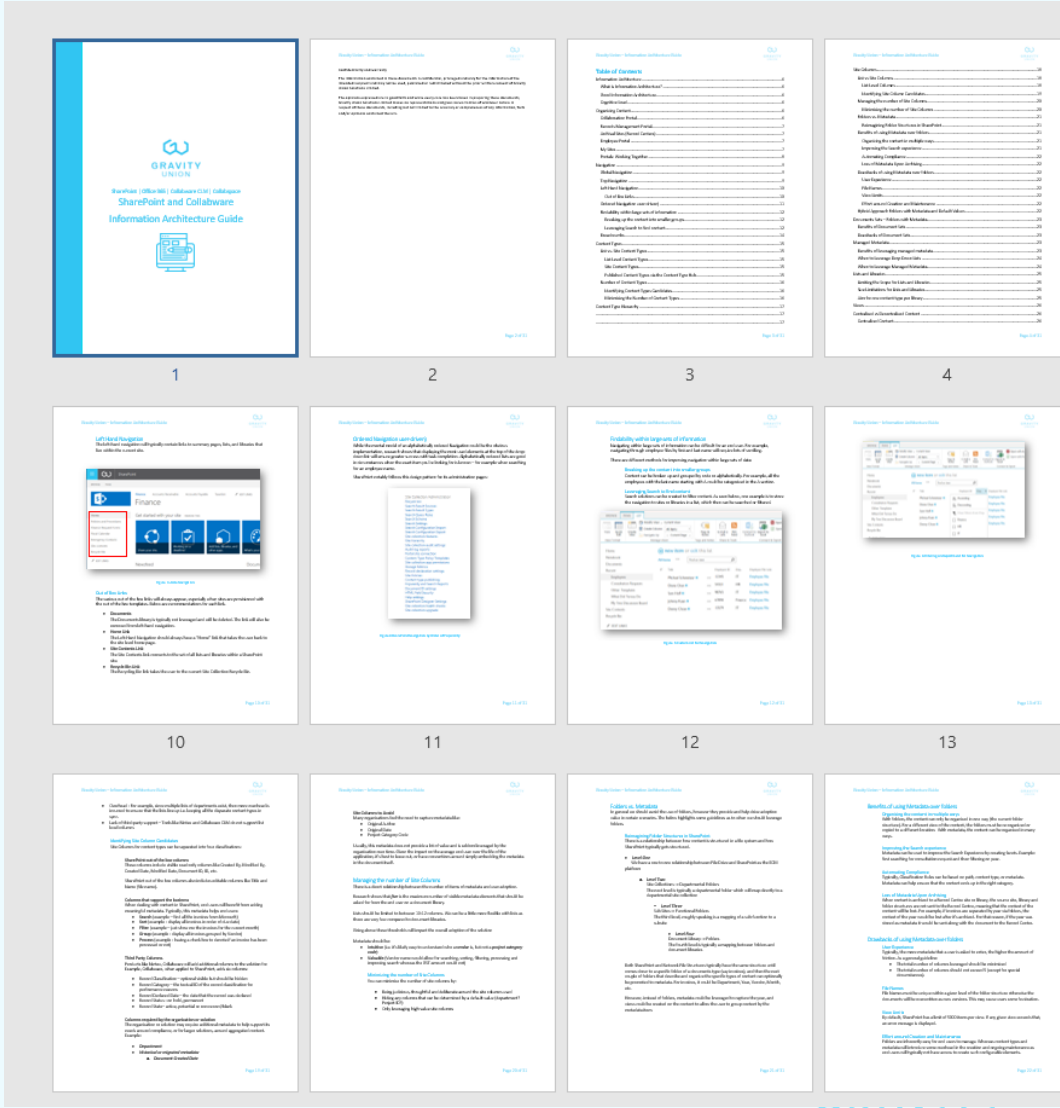
Legend			
R	A	C	I
Responsbil	Accountabl	Consulte	Informed

			IT						RM			HR	CPA	SMT	LT	IT Steering Committee	Board	Departments				Gravity Union			
Area	Function	Activity	Business Anayst	Developer	Database Administrator	SharePoint Administrator	Systems Administrator	Director of IT	Help Desk	Records Analyst\Specialist	Director of RM	Records Liason	Human Resoruces	CPA	Senion Management Team	Leadership Team	IT Steering Committee	Board	End Users	Power Users	Site Admin	Department Leaders	Project Manager	Tiger Teams	Architect	Developer
Technical Administration																										
		Monitoring Diskspace utilzation			R	I	A																A		C	
		Database Maintenance Activities			R	I	A																A		C	
Example Troubleshooting																										
		Performance issues (slow)				C	C	A											I	I	C		A		R	
		Can't access my doc				i	C	A											I	I	C		A	R	C	
		Fixing broken nav (not global)				i	C	A											I	I	C		A	R	C	
		Hyperlinks breaking				i	C	A											I	I	C		A	R	C	
		Error messages in SP				i	C	A											I	I	C		A	R	C	
		Can't find my doc				i	C	A											I	I	C		A	R	C	
		Opening tickets with Collabware				i	C	A											I	I	C		A	R	C	
		Fixing errors in configuration (site level)				i	C	A											I	I	C		A	R	C	
		Troubleshooting integration				i	C	A											I	I	C		A	R	C	
		Opens tickets with/GU/Microsoft				C	C	A													C		A	C	R	
		Troubleshooting third party solutions				i	C	A											I	I	C		A		C	
		Remote Access				i	C	A											I	I	C		A		C	
		Retrieving from second recycling bin				i	C	A											I	I	C		A	R		
Solution Sustainment																										
		SP Training	C							C	I												A	R		
		Creating/Modifying (metadata/taxonomy/search)	C							C	I												A	R		

Example guidelines

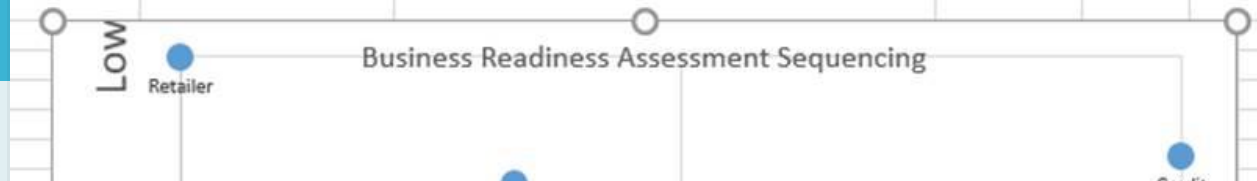
We've documented all our lessons learned and best practices to share with all our future clients:

- Information Architecture
- Security
- Privacy
- Applied Record Management
- Migration
- Change Management (training, communication and Support)
- Governance (roles, responsibilities, guidelines, procedures)



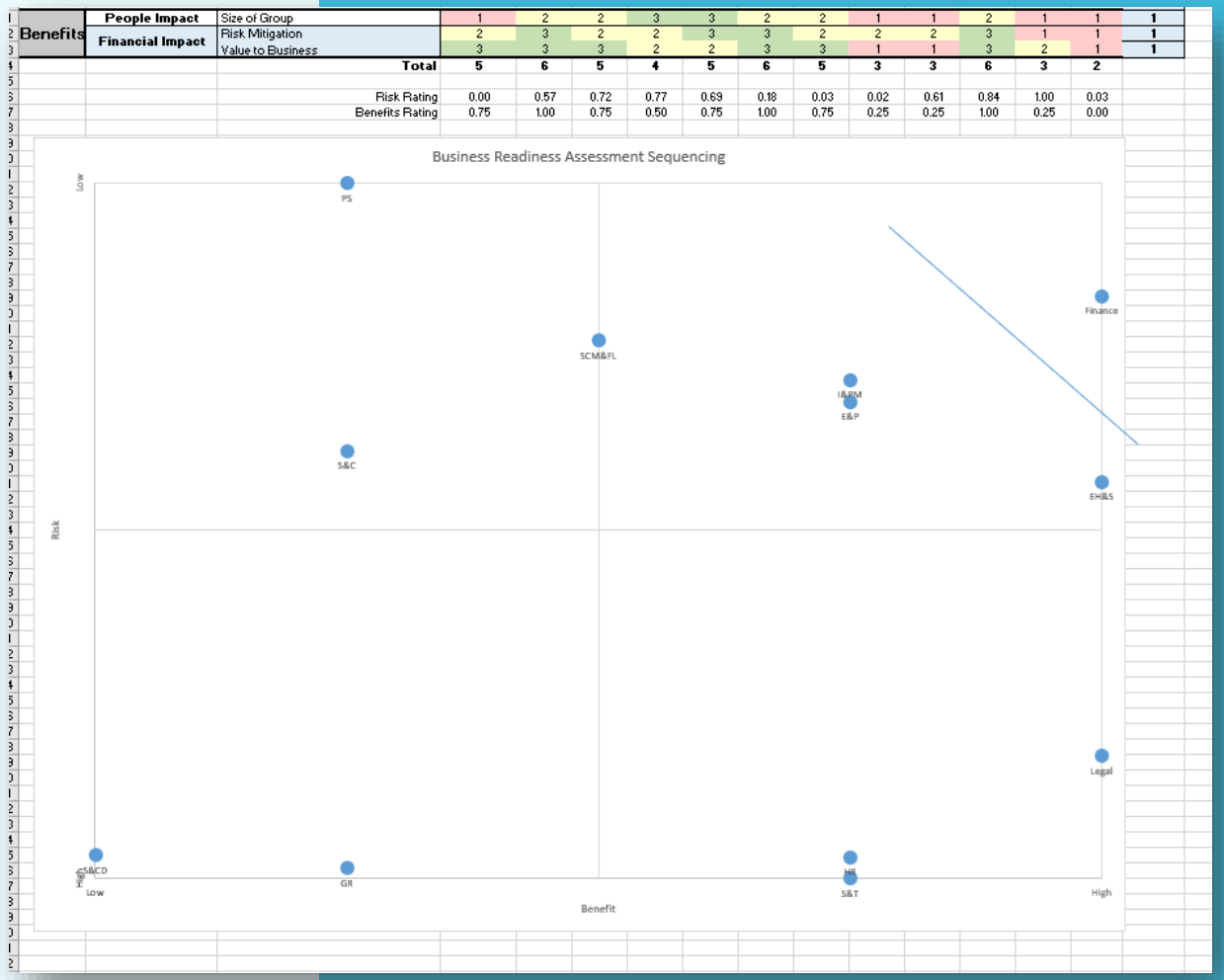
Strategic roadmap

			Corporate Services					Customer Service				
			HR	BS	Log	RA	SPR	IT	Metering	Billing	CC	Credit	Retailer
Risks	Readiness	Current State Awareness	0	2	3	3	3	0	0	0	3	2	3
		Stakeholder Engagement	0	3	3	1	2	3	3	1	2	1	3
		Learning Development	0	2	3	1	2	2	3	1	2	1	1
	Capacity	Organizational and Environmental Considerations	0	1	2	1	2	1	2	1	3	3	3
	Willingness to Engage	Culture and Sustainability	0	1	2	2	2	1	2	2	1	1	2
		Leadership Alignment	0	3	3	2	2	3	3	2	0	1	2
	Complexity	Content Volume Status	1	1	2	1	1	1	2	1	2	1	2
		Content Quality Status	2	2	2	1	1	2	2	1	2	2	2
		Content Source Status	0	1	2	2	1	1	2	2	1	1	2
		Customizations Requirements	0	1	2	1	3	1	2	1	1	1	2
		Metadata Status	0	3	0	1	2	1	0	1	2	1	1
		Security Status	0	3	1	3	1	3	1	3	3	1	2
		Physical Objects Status	0	1	1	1	3	1	3	1	3	1	3
	Organizational Considerations	Size	1	2	3	3	3	2	2	1	1	2	1
		Location	3	2	3	3	1	3	2	3	3	3	3
		Number of Sub-Functions	1	1	1	2	1	3	2	3	2	2	2
	Additional Risks	Completion of Assessment	-10	-5	-7.5	0	-5	-10	-10	-10	-7.5	0	0
		Additional Risk	0	0	0	0	0	-10		0	0	0	0
		Total	-5.81	13.10	16.52	18.86	16.10	-1.14	12.93	7.19	13.33	20.29	25.33
Benefits	People Impact	Size of Group	1	2	2	3	3	2	2	1	1	2	1
	Financial Impact	Risk Mitigation	2	3	2	2	3	3	2	2	2	3	1
		Value to Business	3	3	3	2	2	3	3	1	1	3	2
		Total	5	6	5	4	5	6	5	3	3	6	3
		Risk Rating	0.00	0.61	0.72	0.79	0.70	0.15	0.60	0.42	0.61	0.84	1.00
		Benefits Rating	0.67	1.00	0.67	0.33	0.67	1.00	0.67	0.00	0.00	1.00	0.00



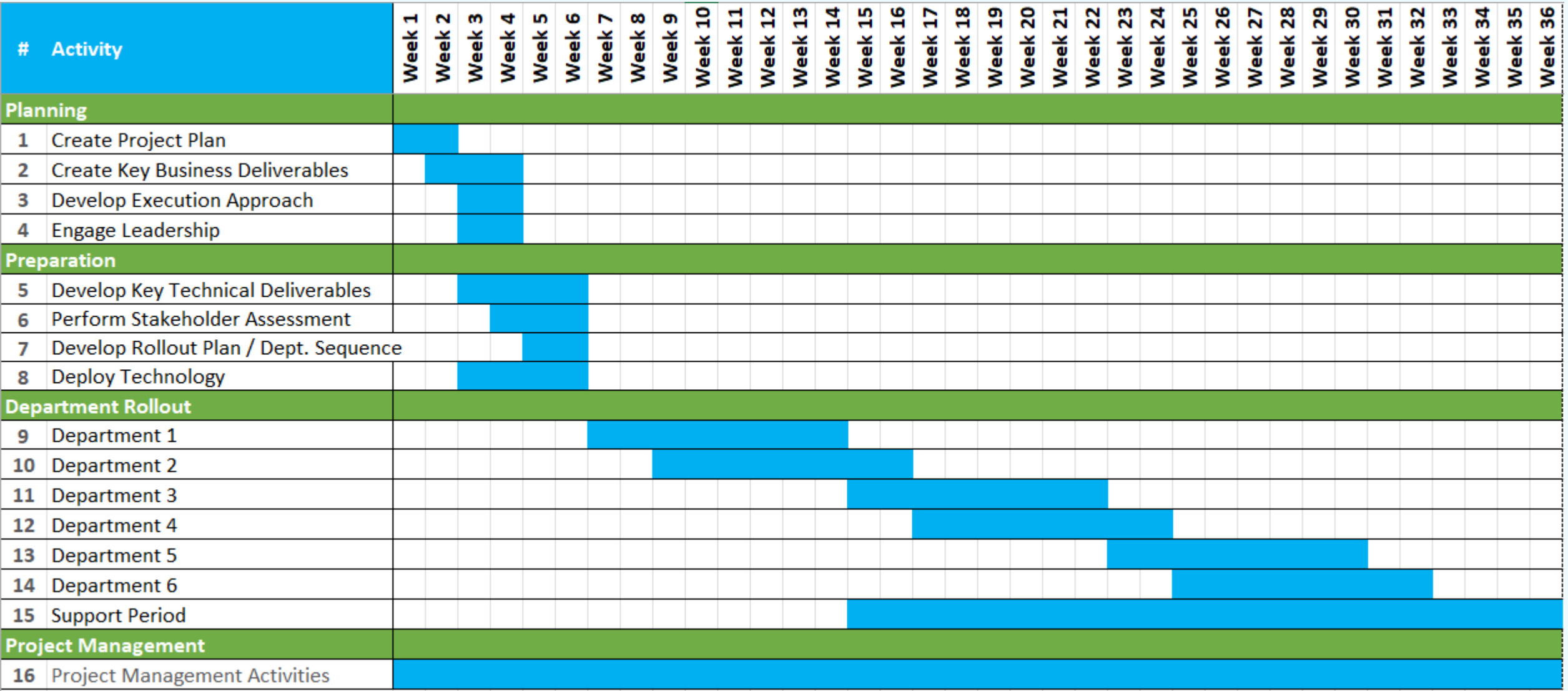
Strategic roadmap

- Work our way from the least risky groups (size, complexity, support, capacity, ability) through to more risky groups (bigger, complex content, less availability, lower capacity to engage)
- Benefits are:
  - Team becomes more capable
  - More pre-made solutions
  - Success stories influencing downstream decision makers



Benefits														
	People Impact	Size of Group	1	2	2	3	3	2	2	1	1	2	1	1	1
	Financial Impact	Risk Mitigation	2	3	2	2	3	3	2	2	2	3	1	1	1
		Value to Business	3	3	3	2	2	3	3	1	1	3	2	1	1
		Total	5	6	5	4	5	6	5	3	3	6	3	2	
		Risk Rating	0.00	0.57	0.72	0.77	0.69	0.18	0.03	0.02	0.61	0.84	1.00	0.03	
		Benefits Rating	0.75	1.00	0.75	0.50	0.75	1.00	0.75	0.25	0.25	1.00	0.25	0.00	

Sample project plan



#	Activity	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20	Week 21	Week 22	Week 23	Week 24	Week 25	Week 26	Week 27	Week 28	Week 29	Week 30	Week 31	Week 32	Week 33	Week 34	Week 35	Week 36
Planning																																					
1	Create Project Plan																																				
2	Create Key Business Deliverables																																				
3	Develop Execution Approach																																				
4	Engage Leadership																																				
Preparation																																					
5	Develop Key Technical Deliverables																																				
6	Perform Stakeholder Assessment																																				
7	Develop Rollout Plan / Dept. Sequence																																				
8	Deploy Technology																																				
Department Rollout																																					
9	Department 1																																				
10	Department 2																																				
11	Department 3																																				
12	Department 4																																				
13	Department 5																																				
14	Department 6																																				
15	Support Period																																				
Project Management																																					
16	Project Management Activities																																				

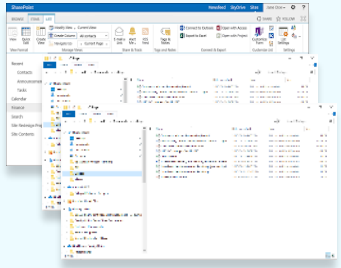
Designing together

Partner with departments and business

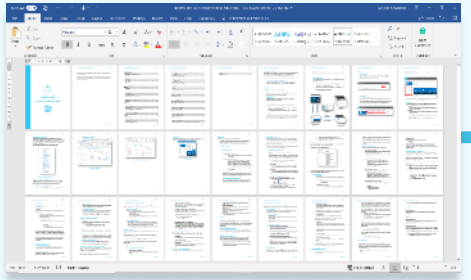
Creative Commons
Photo by Tatiana Syrikova

An overview of our people focussed process

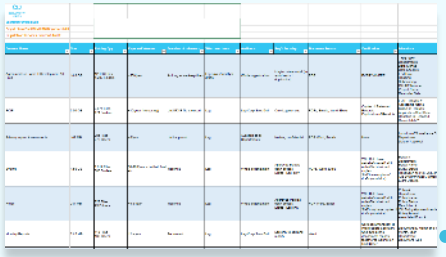
Current state assessment



Solution requirements



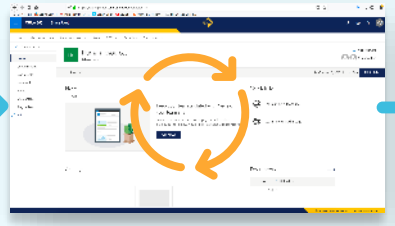
Content audit



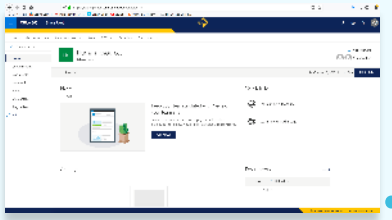
Card sort

Document and Design

Solution Prototype

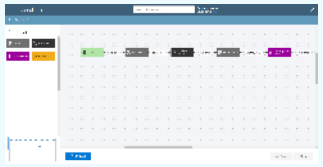


Review and iterate



Migration

Compliance Configuration



Lessons learned

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Taking governance too far

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We don’t want too much governance

- Governance should be about enabling the business
- Automate as much as possible
- Don’t want to get in the way of people
- Think about cost/benefit balance
- Keep it lean!

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Example

- Situation: Content types developed through code, pushed out to different environments, managing code through Jira, creating test plans etc.
- Publishing a site column goes from 5 minutes to 8 hours
- Want to be lean and agile and getting the most out of the process

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Example

- Lengthy forms to request new Teams/sites
- Process is slow, manual, bloated
- Process needs to be streamlined e.g. “create, and ask questions later”

GRAVITY UNION

SharePoint

Home
Bids Portal Login Info
Proposals
Proposal Segments
Team Resumes & Profiles
Proposal Calendar
Recent
Recycle Bin
EDIT LINKS

Spelling...

Name *

Project Name

Proposal Number *

Province
Specify your own value:

Client *

Proposal Format
Hard Copy
Electronic

Questions Due Date
12 AM 00

Due Date *
12 AM 00

Proposal Status

Source of Lead

Site URL
Type the Web address: (Click here to test)
http://
Type the description:

Products

Year

Influenced
No

Description
A description of the Document Set

Award Date

Projects

See all

New | Edit in grid view | Share | Export to Excel | MOAT Deleted Items | Active Projects

Client	Project Name	Site URL	Project Type	Project Status	PM	Budget
	Employee Portal Migration	https://gravityunion.sh...	Delivery - Enterprise	Active	Laura Bower	
Client Name	SharePoint Design and Configuration Services	https://gravityunion.sh...	Delivery - Enterprise	Active	Matt James	$658,711
Client Name	M365 Support	https://gravityunion.sh...	Delivery - Small	Active	Giselle Borges	$29,025
Client Name	EDRMS Planning M365	https://gravityunion.sh...	Delivery - Enterprise	Active	Matt James	$29,050
Client Name	Collaborative Digital Workplace Initiative		Delivery - Enterprise	Active	Matt James	$496,600
Client Name	Mystery Project		Delivery - Enterprise	New	Matt James	
Client Name	Project Dashboard and Threat Survey Solution	https://gravityunion.sh...	Delivery - Small	Active	Giselle Borges	$12,250

Your PMO team

Matt James | Mami Parsons | Giselle Borges | Laura Bower

My Projects News

See all

Add

PDTS - Project Dashboard and Threat...

Client Name oard and Threat Survey Solution...

January 19

COS - Laserfiche Migration to...

Proposal

January 10

Delivery Resources

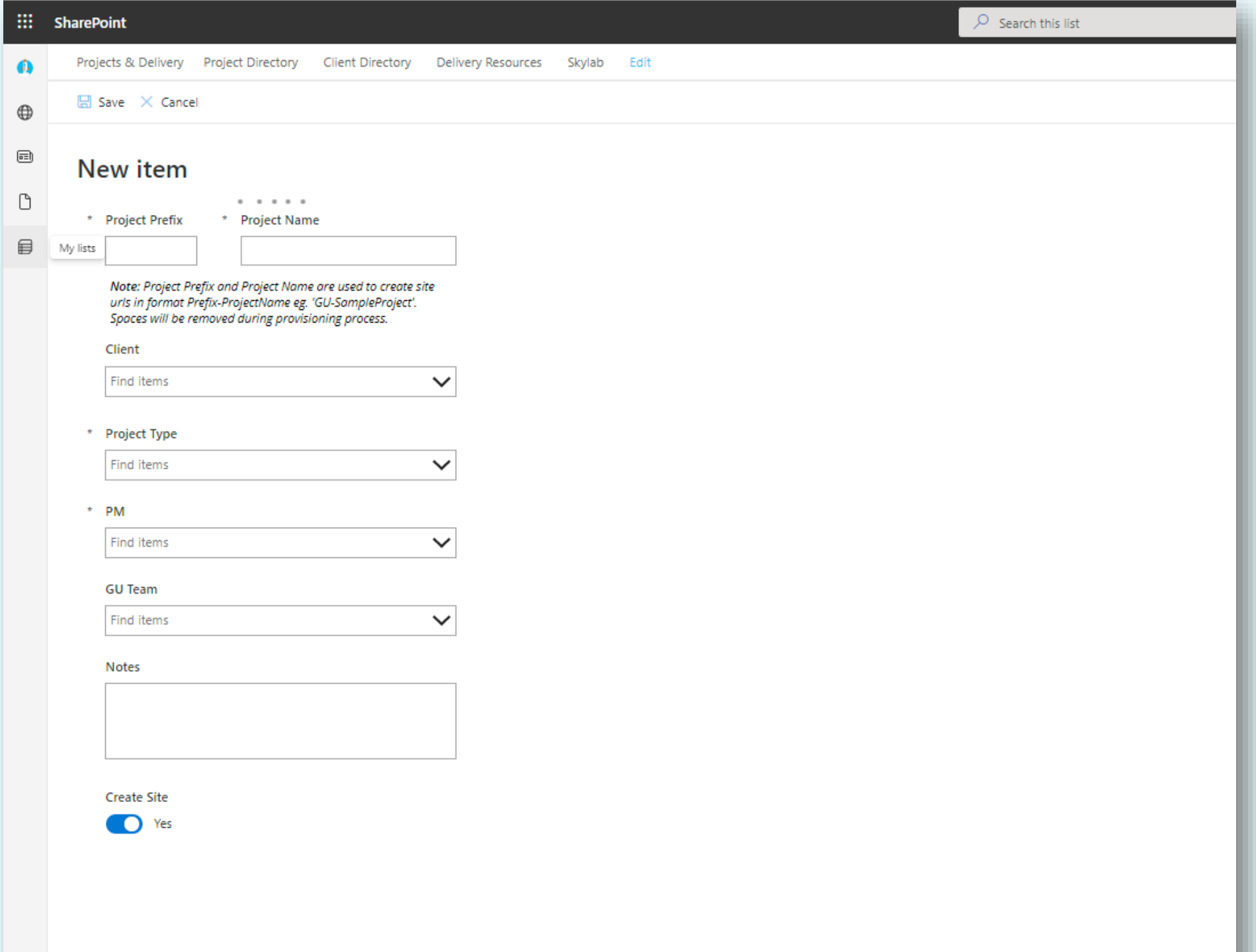
Tools

Useful tools for working with...

December 16, 2021

CCO - M365 & IM Strategy

GRAVITY UNION



GRAVITY UNION

SharePoint

Search this list

Global navigation

livery Project Directory Client Directory Delivery Resources Skylab Edit

Save Cancel

New item

* Project Prefix

GU

* Project Name

Note: Project Prefix and Project Name are used to create site urls in format Prefix-ProjectName eg. 'GU-SampleProject'. Spaces will be removed during provisioning process.

Client

Gravity Union

* Project Type

Delivery - Enterprise

* PM

mat

Matt James
mojames@gravityunion.com

Notes

Create Site

Yes

GRAVITY UNION

Leave Request Approval for Ashley Gibbs

MF

Microsoft Flow <maccount@microsoft.com>
To Michael Schweitzer

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Approvals | Power Automate

Leave Request Approval for Ashley Gibbs

Created by Sophie Ke <ske@gravityunion.com>

Requested for **Ashley Gibbs** <agibbs@gravityunion.com>

Date Created Wednesday, April 6, 2022 8:18 PM
Link Ashley - Vacation

Please approve Ashley Gibbs's leave request:

- **Title:** Ashley - Vacation
- **Start Time:** Monday, June 20, 2022 1:00:00 AM
- **End Time:** Monday, June 27, 2022 1:00:00 AM
- **Leave Type:** Vacation

Thank you.

Approve Reject

Get the Power Automate app to receive push notifications and grant approvals from anywhere. Learn more. This message was created by a flow in Power Automate. Do not reply. Microsoft Corporation 2020.

Summary

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Takeaways

- More ROI for a solution that is governed properly
- Reusable solutions will save time in the long-run
- Downstream activities tend to focus on added-value projects instead of fixes
- Less effort to troubleshoot and maintain properly governed solutions
- Governance can be fun!? (but requires practice)

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Q&A

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Thank you for joining!

mschweitzer@gravityunion.com

www.gravityunion.com

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Compliance Inspired Digital Transformation

SharePoint | Office 365 | Collabware | Collabspace

www.gravityunion.com