



Craft a great Teams and SharePoint Online user experience

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 posted on our YouTube channel:
[Gravity Union – YouTube](#)

What we'll cover today

- ✓ A brief history of User Experience (UX) in SharePoint
- ✓ Why the UX in SharePoint (and Teams) is important
- ✓ Fundamentals of creating a good user experience
- ✓ Examples
- ✓ Creating a good UX in Teams

Introductions



Jas Shukla

Director of Business Development

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



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

Who we are

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

Gold

Microsoft Partner



Gold Certified

Collabware Partner



Content Services Microsoft Partner

- 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



Content Services
Partner Program
Charter Member

Experience Overview

50+

Years of combined
Collabware
experience

10,000+

Users using our
SharePoint and
M365 solutions

40+

Microsoft
certifications

25+

Collabware and
CollabSpace projects

250+

Years of SharePoint
experience across
our team

18

Collabware certified
consultants

50+

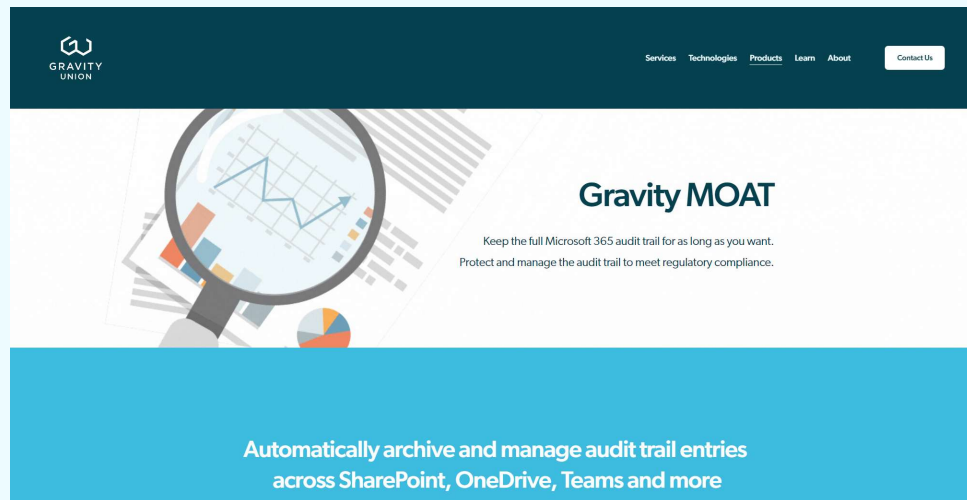
Million documents
migrated and
managed in our
solutions

100%

Project success rate

Makers of MOAT

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



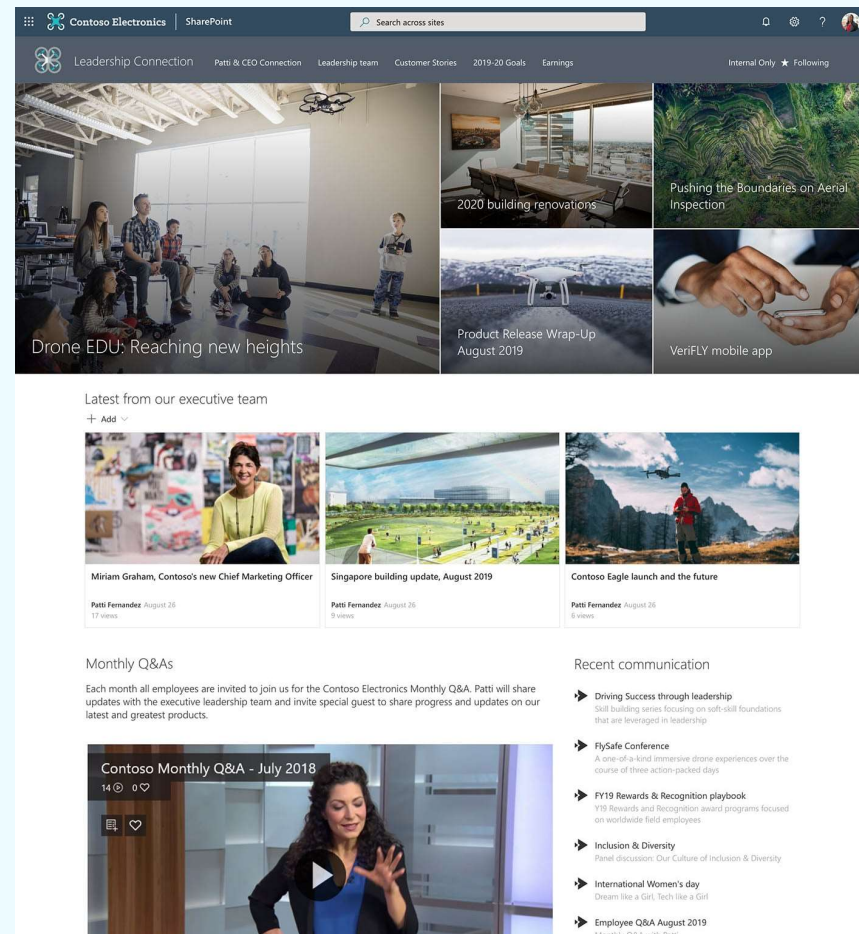
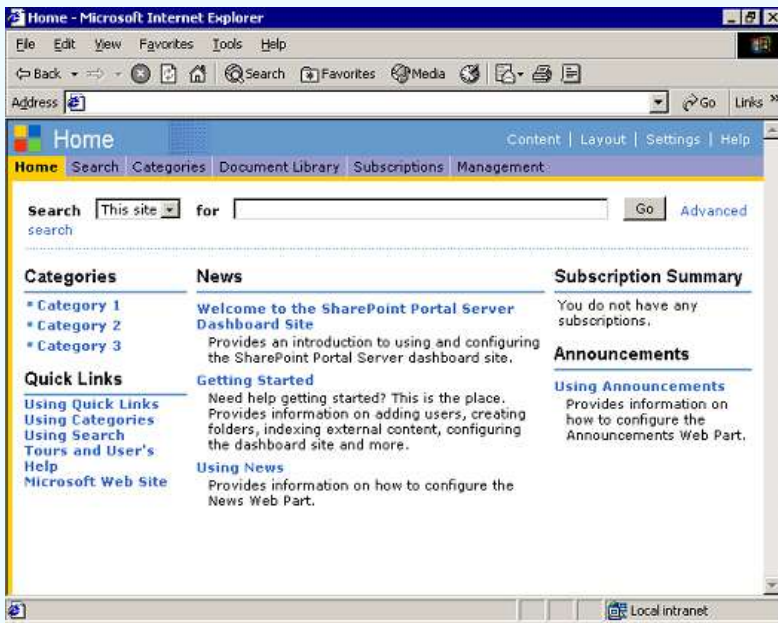
- ✓ <https://www.gravityunion.com/moat>

A Brief history of UX in SharePoint

UX in SharePoint

- ✓ Used to be pretty bad!
- ✓ Used to require a lot of custom effort (css, HTML)
- ✓ Often included changing OOTB behaviour (caused issues with migrating between version of SharePoint)

We've come along way in 20 years!



Why focusing on the UX is important

Let's level set!



5. Failure to stay within budget. ECM implementations tend to miss the mark on staying within the initially agreed-upon budgets.

So the obvious question is: What are the key causes of such high failure rates? The other side of that question, of course, is: What can be done by organizations to avoid them? A more fundamental question is whether ECM is even worth pursuing, given the odds of success – which, for purposes of this discussion, I am going to assume is not worth debating, since many organizations have in fact been successful at it; it's just that certain proactive measures that are critical to ensuring success need to be addressed.

But before we do any of it, I think we need to understand the key reasons ECM implementations fail.

Why ECM Implementations Experience High Failure Rates

1. Disregard for Adoption.

Most organizations are so focused on trying to get something in production, that they tend to disregard the simplicity and fluidity of user experience that is required to [garner the appropriate adoption rates](#). Adoption is a two-dimensional problem. The first dimension is making sure that a critical mass of users is enabled to access and use the ECM system. The second dimension is that a critical mass of content be available through the system. If either of these conditions doesn't hold true, overall system adoption suffers. However, for both the number of users and amount of content, simplicity of user experience is the most critical dimension. If a user has to perform additional work to use the ECM system, that he/she didn't have to do in their old world, more than likely than not, they will bypass the ECM system. Not placing sufficient emphasis on both of these dimensions of user adoption is one of the biggest reasons ECM implementations fail.

Recommendation: Focus on scaling the number of users and the amount of content with an acute emphasis on simplicity of user experience. Integrate ECM's back end with social computing front ends.

[Get Your Free eBook: From ECM to Intelligent Information Management](#)

2. Picking the Wrong Business Scenarios.

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Decline



5. Lack of Focus on Proving business justification.

A big reason why ECM implementations fail is a lack of focus around quantifying the ROI for ECM. Defining concrete and credible benefit streams and tracking against the model to ensure that the implementations produce those results is the only way to obtain sustained executive support and funding. Most business justifications tend to be either too optimistic to be taken seriously, or too generic to be applicable to an organization.

Recommendation: Develop specific business justifications with organization-specific data and a defensible heuristic model, showing peer group benchmark data that can be demonstrated to an executive in 10 minutes or less, but with rigor in the back end to be able to support the conclusions. (See Doculabs' white paper for more details.)

6. Ignoring the Impact of User Experience.

Eventually a system either succeeds or fails based on how it appeals to the user emotionally and whether the user is able to imagine the possibilities of a better world as a result of sustained use of a system. Since ECM has such a huge platform component to it, many organizations fail to get clarity in how "a day in the life of" a user will be impacted a result of ECM.

Recommendation: Build out storyboards or prototypes depicting how a user's life would be materially impacted for the better as a result of using ECM capabilities.

7. Lack of an Overall Vision for ECM.

Most organizations don't tend to have a [sufficiently comprehensive vision of ECM](#) to be able to determine whether their efforts are a success or a failure. A strategy for information management within an organization is largely absent in most places.

Recommendation: Either develop an ECM strategy, or dust off and refine your existing ECM strategy, especially in light of the rapidly changing landscape of social computing, information governance, and cloud-based computing models.

8. Underestimation of Cultural and Change Management Implications.

Last but not least, most failures aren't the result of technology issues. ECM is a mature technology; most ECM suppliers are in their tenth and eleventh major versions of their products. The primary reason for failure is that organizations grossly

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Accept

Decline

Improves Adoption

> User experience = less friction = greater adoption



*It was so **unusable**. Eleven metadata fields! We just **stopped** using it altogether and started managing our documents on our workstations, another file share, anything to **avoid** having to use this **system**.”*

— Forrester Research

Improves Search

Improves the **findability** of content

- ✓ Less likely to **cache** locally (out of date copies of content)
- ✓ Less likely to make **decisions** based on **erroneous** data
- ✓ Less likely to **recreate** documents that can't be found
- ✓ More likely to find required information that the need to support work, **decisions** and **processes**

Improves Compliance

Improves the **organization's ability to manage records** of content

- ✓ Higher adoption means **increased** ability to find, identify, classify and manage **records** in the organization
- ✓ Meaningful solutions that support a good user experience almost always support records management activities like auto classification, auto archiving etc.

Increased ROI

- ✓ Improved search, adoption and compliance – ROI!
- ✓ Long term – shift away from **fixing** SharePoint to focussing on **added-value** activities like custom solutions (Power Apps) workflows, automation, artificial intelligence etc.
- ✓ It takes **more effort** to **rearrange** SharePoint than it does to get it right the first time
- ✓ It takes **more effort** to **untrain** poor habits than to train on good habits from the start

Controlling the User Experience

What can and what can't we do?

What can we control vs. what we can't control?

What can we control?

Naming

Metadata

Ordering

Organizing

Visibility (show vs. hide)

Content Types

Search

Page Layouts

What we can't (shouldn't try) control

Upload\download

Sharing

Check in check\out

Authoring experience (pages)

Versioning

All that core OOTB functionality

Fundamentals of User Experience

Let's level set!

Main factors that go into the user experience

- ✓ Visual appeal (making it nice to look at)
- ✓ Mental effort (cognitive load)
- ✓ Physical effort (how many clicks, actions, etc.)

Visual appeal

Make it nice!

Visual appeal

- ✓ Consistent use of colors, fonts, style that make the site attractive, eases user frustration
- ✓ Strategic use of visual design to draw the eye where we want it go
- ✓ Good use of white space to not overload the end user

The World's Worst Website Ever!

COMING SOON: An even worse site! Look for it sometime later, eventually! we PROMISE!

Traffic Stats

SELF SERVE

THIS WEEK 999 9/10

LAST WEEK 999 9/10

DAILY RECORD 1.4058

>>>> You've found  The World's Worst Website  Ever!

TWWWE is a project to highlight errors in web design by breaking every single design rule imaginable. [Click here](#) for an incomplete list of errors found on this site.

WATCH OUT! This site is under construction! =)

 <-- send us email!

OHHH BOY!

v 2.0

of TWWWE coming SHORTLY!



ЛИСТОВКИ



от 171 грн

WOLF.UA
ПЕЧАТАЙ ОНЛАЙН

 **MAIN MENU**
(and other kewl links!)
smile

NEW **NEW TO THE SITE**



[YAHOO NEWS](#)



[WEATHER](#)

[GOOGLE MAPS](#)

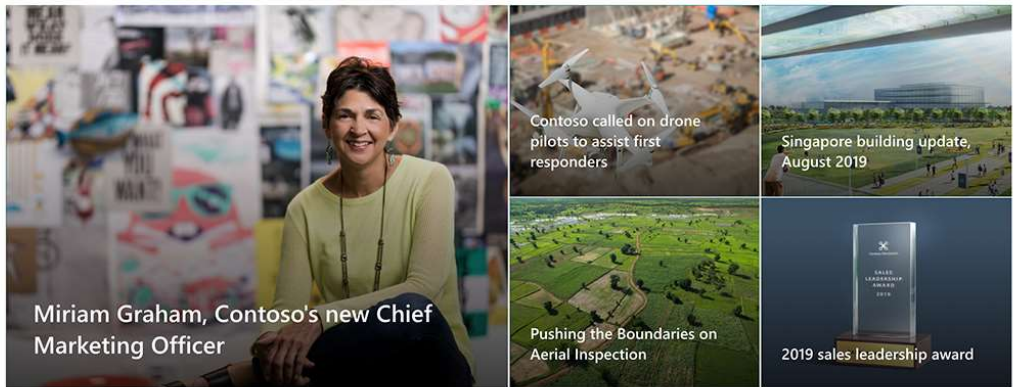
[ABOUT TWWWE](#)

[VISIT KENTUCKY LAKE!](#)

[SHOCKING PICTURES!](#)

[AMAZING COLOURS](#)

[SMOKY MOUNTAINS!](#)



Miriam Graham, Contoso's new Chief Marketing Officer

Contoso called on drone pilots to assist first responders

Singapore building update, August 2019


Pushing the Boundaries on Aerial Inspection


2019 sales leadership award

Redmond, United States








63 °F Mostly Clear
67/76° 09/21/2019 MSN Weather


My news See all


- 

The importance of branding at Contoso
 At the heart of branding at Cont...
 Adele Vance yesterday
- 

Why simplicity matters
 In order to give customers fresh and clear experiences with their...
 Adele Vance yesterday







 <p>Patti announces flagship store opening Adele Vance yesterday</p>	 <p>One million drones sold in 2018 Adele Vance yesterday 1 view</p>	 <p>The importance of branding at Contoso Adele Vance yesterday</p>	<p>Why simplicity matters</p> <hr/> <p>Contoso partners with non-profit to deli...</p> <hr/> <p>Singapore building update, August 2019</p> <hr/> <p>Miriam Graham, Contoso's new Chief Ma...</p> <hr/> <p>Pushing the Boundaries on Aerial Inspec...</p> <hr/> <p>Contoso called on drone pilots to assist f...</p>
 <p>Our commitment to sustainability Adele Vance yesterday</p>	 <p>The future of air traffic: safely sharing the skies with drones Adele Vance yesterday</p>	 <p>2019 sales leadership award Adele Vance yesterday</p>	

- 

One million drones sold in 2018
 Congratulations Contoso team! This September we set a new a...
 Adele Vance yesterday
1 view
- 

2019 sales leadership award
 The sales leadership recognizes high performing technology sal...
 Adele Vance yesterday

My recent documents See all

- |  | Name |
|---|--|
|  | IR Handbook
<small>personal > ... > Documents</small> |
|  | Over Budget Areas
<small>personal > ... > Documents</small> |
|  | Contoso 2019 Medical Benefits
<small>Documents</small> |
|  | Contoso Quad Customer Script
<small>Documents</small> |
|  | BI Improvement
<small>personal > ... > Documents</small> |

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How can we address visual appeal

- ✓ Create a branding standard for SharePoint
- ✓ Engage with your local “Brand Police”
- ✓ Govern the look and feel
- ✓ Hire a designer?

Mental Effort (Cognitive Load)

Don't make them think too hard!

Cognitive load

- ✓ The amount of mental effort we expend to understand what we're looking at
- ✓ The more **complex** a system is the **higher** the **workload** it is for people find what they're looking for and can slow productivity down
- ✓ The **higher** the cognitive load the **less** adoption we get (especially at the onset)
- ✓ Training needs increase exponentially





ProposalsFolderBased

Private group Following 1 member

- Home
- Conversations
- Documents
- Shared with us
- Notebook
- Pages
- Site contents
- Recycle bin
- Edit

+ New Upload Edit in grid view Share Copy link Sync Download Add shortcut to OneDrive Export MOAT Deleted Items Power Apps Automate

All Documents

Documents > Proposals

Name	Modified	Modified By	Owner	Department	Function	Activity	Check In Comm...	File Size	Like count	Version	+ Add column
Proposal0	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		5.0	
Proposal1	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal10	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal100	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal101	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal102	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal103	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal104	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal105	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal106	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal107	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal108	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal109	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal11	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal110	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal111	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal112	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal113	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal12	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal13	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal14	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal15	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	
Proposal16	About an hour ago	Michael Schweitzer		Business Development	Sales	Proposals		0 items		4.0	

Return to classic SharePoint

How we can control cognitive load?

- ✓ Minimizing the **volume** of content being shown
- ✓ Minimizing the number of **options** a user has for a given scenario
- ✓ Minimizing the information we **ask** from users
- ✓ Being mindful how we **name** things
- ✓ Mindful how we **organize** things

Naming Conventions

- ✓ Avoid being “**creative**” with names of sites, columns, content types. All of these play a role in search and are read by end users
- ✓ **Avoid:**
 - ✓ ALL CAPS0
 - ✓ Underscores and special characters
 - `_$taxAmount`
 - ✓ “Disemvoweling”
 - (Mmbrmngmnt vs. Member Management)
 - ✓ placingwordstogether

Ordering

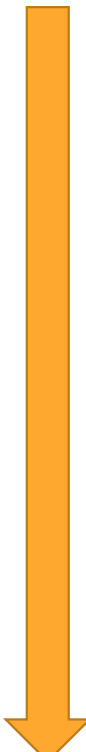
The order of navigation elements is important

- ✓ Order by **popularity** (the likelihood of being clicked), not necessarily alphabetical
- ✓ We typically scan from **left to right** and from **top to bottom**
- ✓ So, placing more popular items in the **upper left** means we spend less time searching for our desired items

Recycle Bin

 EDIT LINKS

Site Collection Administration



- Recycle bin
- Search Result Sources
- Search Result Types
- Search Query Rules
- Search Schema
- Search Settings
- Search Configuration Import
- Search Configuration Export
- Site collection features
- Site hierarchy
- Site collection audit settings
- Portal site connection
- Content Type Policy Templates
- Site collection app permissions
- Storage Metrics
- Content type publishing
- HTML Field Security
- Site collection health checks
- Site collection upgrade

- Microsoft Search
- Configure search settings

User alerts

- RSS
- Sites and workspaces
- Workflow settings
- Term store management

Search

- Result Sources
- Result Types
- Query Rules
- Schema
- Search Settings
- Search and offline availability
- Configuration Import
- Configuration Export

Physical Effort

Don't make them **work** too hard!

Physical Effort

- ✓ How much effort it takes to accomplish tasks in the system
- ✓ How many steps, clicks, hopping back and forth between areas

“

It was so unusable. Eleven metadata fields! We just stopped using it altogether and started managing our documents on our workstations, another file share, anything to avoid having to use this system.”

- Forrester Research

How we can control physical effort?

- ✓ **Co-locate** related items (physically or through search)
- ✓ Avoid **noisy** metadata
 - Example: Original Author, Original Document Date, Document Owner
 - Focus on **two to three** important pieces of metadata
- ✓ **Automate** the collection of metadata (AI, Default Values, Power Automate)
- ✓ **Avoid folders** (increases number of clicks, hides information increases back and forth)
- ✓ Ensure Document Libraries have a **single** purpose

Example too many metadata fields!

Name	Type	Status	Source
Name	File	Required	Document
Contributor	Multiple lines of text	Optional	Dublin Core Columns
Coverage	Single line of text	Optional	Dublin Core Columns
Creator	Single line of text	Optional	Dublin Core Columns
Date Created	Date and Time	Optional	Dublin Core Columns
Date Modified	Date and Time	Optional	Dublin Core Columns
Description	Multiple lines of text	Optional	Dublin Core Columns
Format	Single line of text	Optional	Dublin Core Columns
Resource Identifier	Single line of text	Optional	Dublin Core Columns
Language	Choice	Optional	Dublin Core Columns
Publisher	Single line of text	Optional	Dublin Core Columns
Relation	Multiple lines of text	Optional	Dublin Core Columns
Rights Management	Multiple lines of text	Optional	Dublin Core Columns
Source	Multiple lines of text	Optional	Dublin Core Columns
Keywords	Multiple lines of text	Optional	Dublin Core Columns
Subject	Single line of text	Optional	Dublin Core Columns
Title	Single line of text	Optional	Item
Resource Type	Single line of text	Optional	Dublin Core Columns

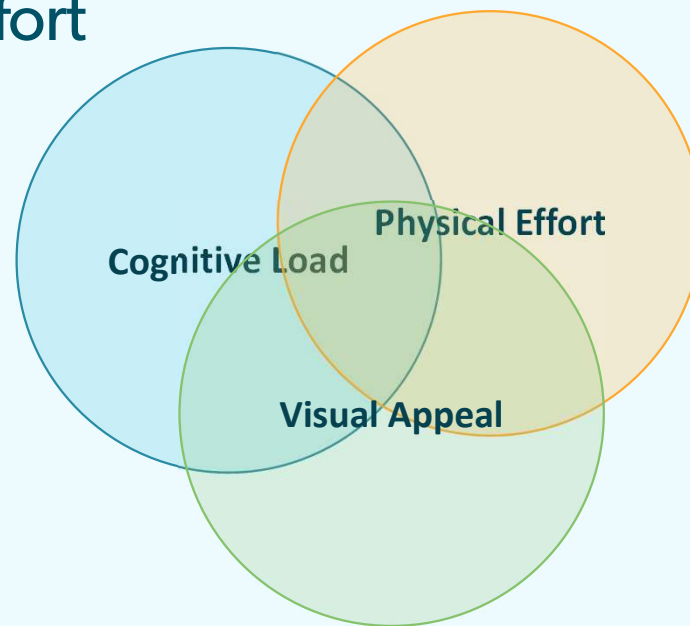
▪ Add from existing site or list columns

Crafting a great user experience

Dozens, hundreds of micro decisions

All three are important, overlapping

- ✓ A great user experience is the combination dozens of decisions around visual appeal, cognitive load and physical effort



Examples

Let's look at some real world examples

File Message Help Tell me what you want to do

Ignore Delete Archive Reply Reply All Forward Meeting IM More

McAfee Anti-Sp... To Manager Done

Team Email Reply & Delete Create New

Quick Steps

Move OneNote Actions

Assign Mark Categorize Follow Up

Policy Unread Tags

Find Related Select

Read Aloud Speech

Translate Language

Zoom


Report Message Protection


Dynamics 365

Insights

Customer Manager

FW: Fun Fact About Your Resume!

 Michael Marchetto
To Michael Schweitzer

 This message was sent with Low importance.

 Reply  Reply All  Forward 

Mon 2019-04-08 4:01 PM



It's old. Like You.

["Michael Marchetto - Detailed Resume March 2019"](#)

That file hasn't been modified since Apr 04, 2019.

If you update it with your latest projects, you won't get this annoying email tomorrow!

Council Meetings - Open

Home

+ New Page details

Council Meetings - Open

Distribution List - Open

▼ Action Tracking

Council Motions 2014-20...

Council Motions 2018-20...

Templates

Create New Meeting

Council Meeting

Distribution Lists

Please fill out the 'Meeting Type' and 'Meeting Date' and 'Submit' to create a new Council Meeting.

Council Meeting Type

Regular

Please select a meeting type from the drop down above.

Meeting Date

3/25/2021

Please select a meeting date.

Submit

Council Meetings - Open

See all

+ New Upload Edit in grid view Sync Export to Excel All Documents

Name	Meeting Month	Meeting Year	Meeting Type
2021-10-31 Special Meeting	October	2021	Special Meeting
2021-10-10 Regular	October	2021	Regular
2021-08-01 Regular	August	2021	Regular
2021-05-15 Regular	May	2021	Regular
2021-05-06 Regular	May	2021	Regular
2021-04-16 Regular	April	2021	Regular
2021-04-14 Special	April	2021	Special
2021-04-04 Special	April	2021	Special
2021-03-20 Special	March	2021	Special
2021-03-20 Regular	March	2021	Regular
2021-03-10 Special Meeting	March	2021	Special Meeting
2021-03-08 Regular agenda	March	2021	Regular agenda
2021-03-01 Public Hearing	March	2021	Public Hearing
2021-02-27 Special for Priority PL...	February	2021	Special for Priority Planning
2021-02-22 Regular	February	2021	Regular
2020-07-22 Regular	July	2020	Regular
2020-07-20 Regular	July	2020	Regular
2020-05-30 Regular	May	2020	Regular

Teams

Not all your work is throw away!

Teams

- ✓ A big problem we see right now is the quick adoption of teams relying on folders etc.
 - Spend some time designing for use in both SharePoint and Teams
- ✓ Govern Teams' Teams (get rid of the old and unused)
- ✓ Leverage **SharePoint Pages** instead of **Document Libraries** for full control

Teams

Your teams

- Skylab
 - General
 - A.S.K. for Help**
 - Change Tracking
 - Learning Center**
 - Organizational Change Management**
 - SharePoint and CollabSpace Enhancements
 - Social Media**
 - SunLife Group Health Benefits**
 - Water Cooler
 - 1 hidden channel
- Project Cortex
 - General
 - NDA Content**
 - Syntax**
 - [Redacted]
 - [Redacted]
 - [Redacted]
- Systems
 - General
 - Join or create a team

Your status is set to do not disturb. You'll only get notifications for urgent messages and from your priority contacts. [Change settings.](#)

PR **General** Posts Files Wiki Site **Proposals** +

Meet

Proposals

New Upload Get link Open in SharePoint

✓	Type	Name	Modified	Modified by	Size
	Folder	SharePoint Application Support Requirement	53m ago	System Account	...
	Folder	2021-001 - Digitization of Student Records	54m ago	System Account	...
	Folder	Document Management	54m ago	System Account	...
	Folder	Records Management System	54m ago	System Account	...
	Folder	Federated Records Management Software	54m ago	System Account	...
	Folder	Records and Information Management Assessment and Roadmap	54m ago	System Account	...
	Folder	SharePoint and Power Platform Support Services	54m ago	System Account	...
	Folder	Research Management System	54m ago	System Account	...
	Folder	Talent Management System	54m ago	System Account	...
	Folder	Microsoft Services for Microsoft Dynamic 365 Products and Cloud Products	54m ago	System Account	...
	Folder	REQUEST FOR PROPOSAL FOR ELECTRONIC RECORDS AND DOCUMENT MAN...	54m ago	System Account	...
	Folder	Enterprise Content Management Solution	54m ago	System Account	...

Teams

Your teams

- Skylab
 - General
 - A.S.K. for Help**
 - Change Tracking
 - Learning Center**
 - Organizational Change Management**
 - SharePoint and CollabSpace Enhancements
 - Social Media**
 - SunLife Group Health Benefits**
 - Water Cooler
 - 1 hidden channel
- Project Cortex
 - General
 - NDA Content**
 - Syntex**
 - [Redacted]
 - [Redacted]
 - [Redacted]
- Systems
 - General

Join or create a team

Proposals

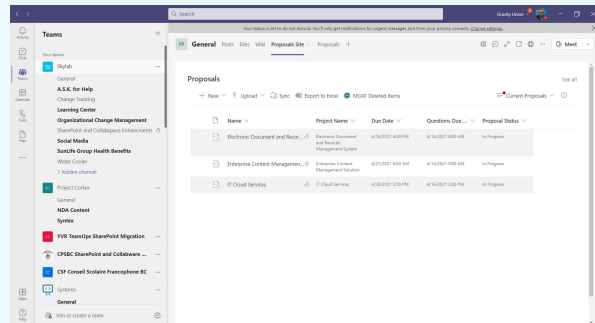
See all

+ New Upload Sync Export to Excel MOAT Deleted Items Current Proposals

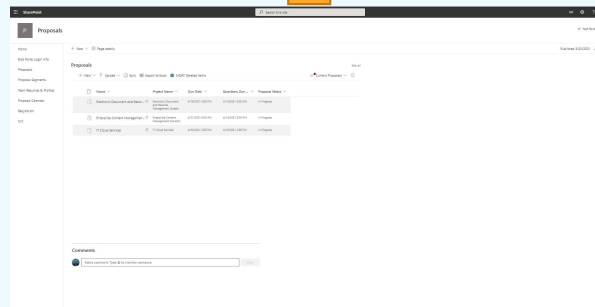
Name	Project Name	Due Date	Questions Due ...	Proposal Status
Electronic Document and Recor...	Electronic Document and Records Management System	4/16/2021 4:00 PM	4/14/2021 8:00 AM	In Progress
Enterprise Content Managemen...	Enterprise Content Management Solution	4/21/2021 8:00 AM	4/14/2021 8:00 AM	In Progress
IT Cloud Services	IT Cloud Services	4/30/2021 2:00 PM	4/16/2021 2:00 PM	In Progress

Designing for Teams

Surface in Teams



Design in SharePoint



Q&A



**Thank you for
joining!**

mschweitzer@gravityunion.com

www.gravityunion.com



GRAVITY
UNION

Compliance Inspired Digital Transformation

SharePoint | Office 365 | Collabware | Collabspace

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