Introduction
If you are deploying Microsoft SharePoint 2010, you have probably considered the technical aspects, how it will support workflows, document management and sales for example; all key elements to drive the business. But have you considered all the aspects of how content will be migrated, accessed, maintained, enhanced and improved in the platform, while encouraging collaboration?

Mark Morrell, former BT (British Telecommunications) Intranet Manager and now an intranet expert combining strategic thinking with implementation skills, provides a best practices content checklist for encouraging high user adoption of SharePoint, while ensuring that the business’ information compliance and security goals are met. Mark provides all the elements you need to check against to ensure an effective content strategy for SharePoint.

Before you start, it will help if you have some form of intranet governance framework – strategy, plan, roles and responsibilities, standards, etc. – in place first. But don’t worry if you don’t or you want to improve it.

Best Practices for SharePoint® Content Checklist Summary

There are five essential phases that every business needs to complete when implementing SharePoint 2010. The five phases include:

Phase 1 – Choosing SharePoint
This phase includes considering why SharePoint is the right tool for the business and that the foundations for a successful intranet strategy are in place.

Phase 2 – Third Party Solutions to Consider
Phase 2, focuses on solutions that help automate and ensure compliance to provide confidence in the security and integrity of the content available in SharePoint.

Phase 3 – Pre-Deployment Planning
Phase 3 focuses on everything required to be prepared for the migration of content to run smoothly.

Phase 4 – Deployment
If the above three phases are completed in line with the checklist, phase four, deployment, should run smoothly with content being transferred seamlessly.

Phase 5 – Post-Deployment
The last phase ensures that SharePoint is not only successful upon deployment, but an essential tool for the successful running of the business with widespread adoption.

Within this checklist, each phase is covered with a step-by-step best practice guide. Whatever stage you might be in your SharePoint deployment, you’ll find the checklist a practical tool.
How to Use this Checklist

This checklist covers every stage of your SharePoint 2010 deployment. Using this checklist as a guide will help instill confidence in the integrity of the content available to employees in your organization. When you have completed the checklist below, you will have succeeded in improving the quality, security and integrity of your content, using SharePoint 2010.

Phase 1 – Choosing SharePoint

There are some foundations you need to have in place before choosing SharePoint 2010 that includes a/an:

- Intranet strategy that aligns to your overall business strategy.
- Plan approved for SharePoint 2010 as well as the resources and team members to implement it.
- Budget that covers all the costs of deploying SharePoint 2010 and includes migration of content.
- Outline of content requirements based on business and IT needs, including what is published and what needs to be migrated.
- Assessment of how people using SharePoint 2010 will benefit and how these benefits will be measured.
- Early adopter’s program that has validated the best method for publishing content using SharePoint 2010.
- Governance and content framework showing who is responsible for each piece of content to be migrated (if not, you need to create a document). You need to know:
  - Who are the content owners?
  - What are the content owners’ contact details?
  - What content is each owner responsible for?
  - Where is the content published and what is the site address?
  - Alternative contact(s) and what are their details (e.g. content owner’s line manager)?
  - Rules on what individuals or groups have permission to view the content that is being created?
  - Policies on content access. Is for internal use only or will it be shared or published outside of SharePoint to a public-facing website?

With all these activities completed you are now ready to start planning to deploy SharePoint 2010.

Phase 2 – Third Party Solutions to Consider

It is vital that content migrated to SharePoint 2010 is managed from day one. In addition to having a governance framework showing how content will be managed you need third party solutions to help automate and ensure compliance. Organizations using SharePoint 2010 must be confident in the security and integrity of the content, as well as the ability to prevent secure information from leaving SharePoint or from being exposed to unauthorized personnel. As part of a best practice deployment, you should also have the ability to audit and report on content compliance to provide insight into potential issues and documentation for regulators in case of an issue.

Be sure your organization has publishing standards that underpin company policies. For example:

- **Business** – information retention for compliance standards and unique requirements for data compliance.
- **Regulatory** – classification of content if individual or business units should not access or use it.
- **Legal** – meet regulations for data and information privacy and security (PII and PHI), as well as Web accessibility (WCAG/Section 508) to avoid discriminating against people with disabilities.

To aid in meeting the internal and regulatory compliance and publishing standards you define, look for automated solutions that allow you to check that content complies with privacy, accessibility and company-specific standards.
Look for products that are integrated with SharePoint and can check content at the point of publishing for:

- **Owner** – employees are able to see on every page who the owner is if more information is required.
- **Privacy** – ensure no personal or health-related (PII/PHI) information is shared with unauthorized users or published outside of SharePoint.
- **Security** – prevent confidential information from being published like merger and acquisition information, financials, trade secrets, etc.
- **Metadata** – ensure metadata is added to aid in content search.
- **Branding** – monitor for incorrect branding which may cause confusion like old product names.
- **Accessibility** – make certain content is accessible prior to publication to ensure all employees and customers can access information equally.
- **Review date** – without review dates employees may not trust content is current and accurate.
- **Duplication** – avoid duplicated content that has a similar or same title.

Ensure you put automated solutions in place to not only check content at time of publication but to also monitor content regularly after it has been published to ensure on-going compliance.

Remind owners to periodically review content to comply with information retention policies.

- Owners should validate if it is still needed and update content if it is still relevant.
- If content is no longer needed delete it.
- If no action is taken by the expiry date, automatically remove it and inform the owner.
- Delete content if no action is taken by the owner or manager after it is escalated for urgent action.

Include third party tools that can search and bring all the content together into one place for employees to review. This will allow you to easily aggregate content from MyProfile, MySite and TeamSite to help employees find all the relevant information about a person or subject.

Choosing the right content compliance automation solution will help your organization achieve the full benefits of SharePoint 2010 including enhanced productivity, lower support costs, and improved integrity of content.

**Phase 3 – Pre-Deployment Planning**

Before you deploy SharePoint 2010 you need to have prepared everything required for the migration of content to run smoothly. By following this checklist, you can migrate content from any current publishing technology you use to SharePoint 2010.

- You should have a clear understanding of where the migrated content will be published (or will be available) in the specific SharePoint 2010 feature such as MyProfile, MySite and TeamSite:
  - **MyProfile** – what personal information needs to be available?
  - **MySite** – what personal information needs to be available and can be:
    - Added by the person.
    - Automatically fed from HR systems and Active Directory.
    - Edited by other people with right permissions.
  - **TeamSite** – what business information needs to be available and can be:
    - Added by the site owner.
    - Added by other contributors.
    - Added by the setting of permissions.
    - Project documentation, policies, approved information and news.

- You have the level of permissions implemented prior to deploying SharePoint 2010 so all employees are able to use the content in line with policy. This covers:
  - Who has permission to create new content?
  - Who has permission to contribute to content?
  - Who has permission to view content only?
  - Who can view content (i.e. content not shown unless employee has the correct permission levels).
You have a top level of metadata and mandate this to be added to any content prior to it being published. The metadata needs to include organization-wide subjects:

- Organizational e.g. human resources.
- Functional e.g. process.
- Active e.g. training.
- Personal e.g. names of senior executives.

Decide if a folksonomy will be used so employees can categorize content as they choose to search for it. If no, then identify how many further levels of the taxonomy will be needed.

You need to ensure your publishing standards on regulatory, legal and business requirements will be met. They can be embedded into the SharePoint 2010 masterpage (template) and webparts to be confident of compliance and to minimize what a content owner needs to do.

You have identified all the existing content published that needs to be migrated to SharePoint 2010. This can include:

- Policies in a document management system.
- Factual information and news in a content management system.
- Collaborative content in blogs, wikis and podcasts.

You have clearly communicated what will happen to everyone involved. This should mean:

- Content owners know what they need to do and by when.
- Project team knows what stages of the project they are coordinating.
- Sponsors and stakeholders are signed-up and have approved the plans.
- Priorities are accepted and known so the sequence of migration is not a surprise.
- Everyone is aware of the benefits from these planned changes.
- IT partners have tested the performance of SharePoint 2010 prior to it being used.

You have had owners review all content and decide if:

- It is still needed.
- It is not duplicated elsewhere.
- It is current and up to date.
- It has previously been updated.
- It is ready for migration.

You have prioritized the order in which each piece of content will be migrated using one of the methods below. It will depend how large the task is as to which method is most cost effective. Normally the larger the task (over 1,000 pages) the more effective it is to use a tool. It will also depend on how much you trust a tool and how much you need to check each stage of the content migration. Methods include:

- Using a tool which automatically migrates the content without the owner touching it.
- Migrating content manually by the content owner or a dedicated project team.
- Using a combination of both of the above.

Once you have completed these actions you will be ready to consider the next stage.

**Phase 4 – Deployment**

You are now ready to deploy SharePoint 2010 and transfer the content that has been reviewed. You will need to ensure the following:

- Communications have been sent to everyone who will be migrating the content.
Support is available including:

- Training so employees are clear what they are required to do.
- Guidance to help answer any migration queries.
- Discussion forums for people involved in the migration to raise and answer queries.
- Wikis to create FAQs.

SharePoint 2010 masterpages, themes and webparts are available for use.

Approved content is moved to TeamSites.

Collaborative content is being moved to MyProfile and MySites.

Feeds from Active Directory and Human Resources are pre-populating with fields including:

- Name and job role.
- Contact details – email, phone, etc.
- Organization hierarchy – business unit, manager, etc.
- Skills and experience.

Progress reports are collated so each piece of content is recorded as migrated. Check that content has actually been moved from its old place and appears in the correct part of SharePoint 2010.

An automatic re-direct is used. Employees must still be able to find the content that has been migrated in the new location for future reference.

Compliance and security tools are operating and checking content that is published in SharePoint 2010 while providing reports on activity.

Updates are communicated on progress to senior stakeholders and the publishing community.

You respond to any recurring issues that are raised.

The migration plans are meeting their targets.

Phase 5 – Post-Deployment

You have migrated content from the existing publishing tools. Using SharePoint 2010 to publish collaborative and approved content is now seen as ‘business as usual’. For your SharePoint deployment to continue operating efficiently, ensure:

- The SharePoint 2010 strategy continues to align with the organization’s overall strategy and is updated for changes to existing and new policies and laws.
- The governance framework is relevant and updated regularly.
- Key stakeholders review the strategy regularly.
- Continued support for technical and non-technical issues.
- Regular review of and updated guidance and training based on feedback.
- Tracking of platform, support and license savings, along with productivity and other business benefits.
- Continued measurement of how satisfied employees are using SharePoint 2010.
- Continuous auditing and monitoring of content compliance against defined standards to maintain data integrity and security, as well as employee and customer confidence.

Conclusion

The key principle for a successful deployment is to make sure that employees continue to have confidence in the availability and integrity of the content they need for their work. The migration should be seen as seamless for employees searching and accessing content while being easy for publishers and contributors to use.