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Get to the Point!

Leveraging SharePoint in Learning and Development

White Paper

by

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Social Networking. Web 2.0. Wikis. Blogs. Collaboration Tools.

These are all topics discussed in Learning and Development (L&D) circles as organizations continue to develop their visions for the future. With the continuing evolution of the workplace, as well as advances in technology, creating learning environments that are more conducive to today's worker is a top priority. As more companies continue to roll out enterprise learning applications, the ways employees interact with each other, both from a collaborative and educational perspective, become more and more important with each passing day. No longer are applications such as the Learning Management System (LMS) the sole means to track course completions or the only way for users to interact in a training environment.

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The Evolution of Informal Learning

A growing trend over the past several years has led to the “portalization” of eLearning, especially as more organizations truly delineate the differences between formal and informal learning within their L&D organizations. Formal learning, consisting of typical instructor-led classroom sessions, has been the norm for organizations for many years. However, as more organizations have invested in enterprise portal and content management tools to expand upon the capabilities of typical learning technologies, informal learning has become more prevalent.

Informal learning is widely used to describe the many forms of learning that take place independently from instructor-led programs, such as performance support materials and systems, coaching, communities of practice, and expert directories. Informal learning, from a technology perspective, is primarily achieved by leveraging additional enterprise applications rolled out within an organization. From content management systems, to business intelligence tools and enterprise portals, more technology is being leveraged in the workplace to make informal learning more accessible to the end user. And the end user, the learner, is and must be the main consideration when rolling out an engaging learner environment.

Microsoft's Impact on Informal Learning

One of the most commonly purchased enterprise portal applications leveraged in today's workplace is the Microsoft SharePoint application. Microsoft describes SharePoint as “an integrated suite of server capabilities that can help improve organizational effectiveness by providing comprehensive content management and enterprise search, accelerating shared business processes, and facilitating information-sharing across boundaries for better business insight.” But is SharePoint suitable for meeting the informal learning needs of your organization? How can your organization best leverage SharePoint to achieve success?

Six Easy Steps to “Get to the Point” in Your Organization

Within tools such as LMSs, users tend to be siloed within the groups and classes that they are taking. Within SharePoint, users can collaborate not only on a class level, but also on a task level as well, allowing users to share best practices and common experiences that relate both to the courses they are taking and to the job roles they are performing. In order to truly engage the learner in informal learning via SharePoint, it is important to consider key points for rolling it out and ensuring SharePoint makes an impact in your L&D organization. The following six steps will help you “Get to the Point” and help your organization leverage SharePoint to meet its informal learning needs.

Step 1 – Define a Vision

In order to determine whether your organization is pursuing informal learning, the most commonly asked question is “Are you constantly looking for ways to increase participation and sustain momentum in your learning communities?”

For most organizations, the answer is a resounding “yes.” According to Jay Cross in his book, *Informal Learning: Rediscovering the Natural Pathways That Inspire Innovation and Performance*, formal learning in the form of classes and workshops is the source of only 10 to 20 percent of what people learn at work. The rest is attributed to informal learning. But why is this important?

The problem most commonly associated within training organizations, and the reason behind the push for more types of informal learning and collaboration, is access to information, both in a training environment and in the collaborative workspace environment. How a learner receives and shares information impacts the entire organization. The ways employees interact with each other, how they share the information they have learned, and how they take their “lessons learned” and apply them in the day-to-day completion of their jobs become more important with each passing day. In fact, as organizations evolve and employees migrate from one job to another, capturing and retaining knowledge—and sharing that knowledge with others—becomes important for the continued success of an organization.

Defining the problem, identifying the need for a collaborative environment and defining how your organization can capture key learning information are key for your program's success. As most commonly stated, in order to fix a problem, you need to identify that you have one. If your organization has identified the need to offer more informal learning and collaboration solutions, capture this information and create a “Vision and Planning” document that identifies the strategic objectives that your company has as related to the technologies available. This document will help you not only identify and address your informal learning needs, but also help you measure the success of your initiative once you have rolled out your solution. Build a vision for the type of environment you want to create, list the business benefits that will result and establish an evolutionary process that allows for trial and error in a controlled environment.

Tip:

Create the vision document and share it within your learning organization. Make an effort to obtain sign-off by users and initiate focus groups to ensure that the vision identified meets their needs as well.

Step 2 – Create an Engaging User Experience

The impacts of such tools as Facebook and Twitter outside of the workplace have helped create a culture that lends itself to a different type of interaction with web-based applications. How site navigation is managed, how usability is measured and how appealing the site is to utilize are often key considerations when rolling out any website, especially an application such as SharePoint. In order to determine the type of collaboration your organization needs, you first need to understand the user experience your learners are expecting.

The key to understanding your company's informal learning needs is to first understand how your users are looking to leverage the application. In the movie *Field of Dreams*, the common mantra was "If you build it, they will come." However, one of the problems with the successful rollout of SharePoint and other enterprise tools is that oftentimes the application is engineered in such a manner that when you build it, they don't come, primarily due to the developer's lack of understanding of how users truly want to leverage the application.

A similar dilemma exists in the eLearning space between the top-down objectives focus of learning content developed for LMSs and the horizontal emphasis of eLearning 2.0 applications focused on collaboration and performance support. Users are no longer looking to just go to a website to take and view their courses. Intuitive navigation, contextual search and easy administration are now the keys to understanding how your users want to and need to experience L&D. And, they are the also keys to building a successful user experience within SharePoint.

This is most commonly accomplished by surveying your team on their preferences from a site layout perspective. Start by seeing how successful they feel other sites and applications your organization has rolled out are at effectively meeting their needs. In most organizations, this can be as easy as sending out a survey that specifically targets questions around end-user experience. Are the current applications provided by L&D engaging? Which features are you utilizing most? What features do you feel are missing on current sites? These are questions that will help you gain information on how best to roll out collaboration and collaboration tools within your company.

Collaboration doesn't require a large systems integration exercise when you leverage what's already readily available and proven. Utilize the survey results as you continue to deepen your understanding of the requirements that you have defined in your vision document, and continue to focus on how best to roll out informal learning. Project teams can use collaborative and social networking tools to support this kind of informal learning. It is important to note that as social networking tools continue to develop new ways of connecting employees, determining how to best provide an engaging user experience will help your staff truly utilize the social networking tools to their full capacity.

Tip:

Organize a white-boarding session and map out the user experience requirements as related to page layout and order of importance. This will allow you to show which features of SharePoint are important to your people and how best to roll them out. Be sure to concentrate on "out-of-box" features first; then create a "parking lot" for items that require customization.

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Step 3 – Leverage SharePoint’s Features

In order to fully utilize SharePoint as a social networking and informal learning tool, it is important to truly understand who is using SharePoint and how it is being used. Since 2001, Microsoft has sold well over 100 million licenses of SharePoint, generating more than \$1 billion per year in revenue. Given SharePoint’s widespread use and the growing interest in applying social media applications to collaboration challenges in organizations, formal content can now be searched and referenced with informal and social content.

From an L&D perspective, SharePoint allows for such things as:

- Task oriented, in-context collaboration
- Personalized aggregation points for your user’s experience
- Enterprise search
- Business intelligence
- Enterprise content management

SharePoint is more widely deployed at the workgroup or department level as an enterprise portal application. However, the bottom line is that SharePoint is more than just a portal server; it has numerous benefits for training organizations and is now being used by more organizations as a means of providing a social networking user experience. Understanding these benefits and embracing the features available will allow for the most successful launch of SharePoint as a springboard for additional collaboration activities as related to learning.

One of the most common errors seen when rolling out applications such as SharePoint is the lack of training on the application for both users and administrators. One of the best ways to avoid this is to utilize the “Discussion Forum” web-part available within SharePoint. Start and monitor discussion threads on features and capabilities within the tool, and post some of the SharePoint “list” features to display “Tips on How to Use SharePoint” to ensure your learners know how to best leverage the application.

Tip:

SharePoint has many readily available features for creating lists. Use those features to show quotes, tips, best practices, videos and other means for demonstrating how other users are leveraging the application. Remember, the purpose of the rollout is to support informal learning; the best way to ensure people leverage SharePoint properly is to fully utilize the features.

Step 4 – Manage Your Information Architecture

Microsoft states that information architecture is “often recorded as a hierarchical list of site content, search keywords, data types, and other concepts.” Once you understand SharePoint and how it can best be utilized, it is important to change your focus and concentrate on your information architecture.

Creating an environment conducive to informal learning, team collaboration, information access and decision-making leads to the development and evolution of your organization’s information architecture. As you roll out SharePoint, make sure to understand the impact of site structure on relevancy, as well as how best to use metadata to improve “searchability” and “findability.”

It is important to realize that adding SharePoint to your infrastructure helps truly create communities of practice, and these communities of practice create, by default, “people networks” that are sharing information and experiences as related to informal learning. Designing these “people networks” should inform the design of the technical networks and the interactions between your different learning technologies.

As the volume of data increases on your SharePoint infrastructure, so does the importance of developing a sound information architecture approach. Friendly navigation, effective search and insightful tagging of data will lead to more successful use of SharePoint. Learners will better understand the connection of elements such as courseware, related Frequently Asked Questions (FAQs), and best practices, and you will gain insight on how to best leverage your existing applications, such as your LMS, as well your rollout of SharePoint.

Tip:

Create a high-level information architecture table that identifies the key features that you are storing, the type of information that is being stored and the reason you are storing it. Add this as an addendum to your vision document, and frequently refer to it periodically to ensure relevance.

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Step 5 – Measure Success

SharePoint works well for situations in which defined groups need to reach a collaborative understanding of project requirements, their role in achieving those objectives and what success means for the project. But the key to measuring the success of your SharePoint rollout is to establish metrics. From an L&D perspective, there are multiple ways that can be achieved. It is important to incorporate measures of success so that the organization doesn't view what you are trying to accomplish as experimenting with technologies, but as an evolutionary tool that will work toward achieving real business benefits.

There are many keys to measuring a successful rollout of SharePoint. One of the most common is increased collaboration, which oftentimes is measured by determining how long it took to educate your user base as opposed to before you had the site. Do such things as keeping track of the number of responses to discussion forums and surveys. This will help show relevance as related to the creation of that collaborative experience. Also, track components such as the number of downloads of items like best practices. This will allow your organization to see not only that the site is being used, but also that the information being gathered and posted by the learning leaders within your organization is being properly disseminated to others.

Another key in measuring success within SharePoint is the use of search. As users become more reliant on leveraging applications like Google and Bing, the ability to quickly and properly bring proper and relevant search results to a SharePoint user becomes essential. Mapping and measuring throughput from search and speed of results will help measure success as more materials are posted over time. One hint in measuring this is by mapping the speed to which results return to users and allowing the users to rate the experience and relevance of the content.

Tip:

Focus on two to three items to measure, both qualitatively and quantitatively. This will allow you to not only show the impact of SharePoint from a training perspective, but also from an enterprise application perspective as well. Focus on items like search and files added to the system, as those will likely be the easiest to measure return on investment.

Step 6 – Implement Successful Governance

Microsoft defines SharePoint governance as “the set of roles, responsibilities, and processes that you put in place in an enterprise to guide the development and use of a solution based on SharePoint.” It is also defined in part on Wikipedia.org as “...focused on information technology systems and their performance and risk management.”

One of the keys with successful SharePoint governance is to understand that governance is both a plan and a process. In order to best manage and maintain your L&D use of SharePoint, it is critical to understand the information architecture and how you plan on managing it prior to your rollout. Adoption of SharePoint technologies can become uncontrollable without proper governance.

It is vital for your organization to define and execute a plan for governance. The following are four essential considerations related to governance:

1. Configure SharePoint to meet your organization's requirements, rather than configuring your organization to meet SharePoint's out-of-box features.
2. Establish a governance body within your organization.
3. Create a governance plan. Make sure as you are creating that plan to review key features of SharePoint that impact governance, with specific sections created for search and taxonomy. How search is used and metadata is stored will have immediate impacts on the usability of your site.
4. Focus on the differences between content author and content consumer. Understanding how content is to be stored and maintained versus how content is going to be used and consumed is key in creating the approach on how best to govern your SharePoint site.

The more you identify the processes and procedures necessary to manage and maintain your infrastructure, the more successful the rollout will be.

Tip:

Establish a governance committee prior to site rollout, and schedule quarterly governance meetings to ensure SharePoint is being used properly.

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How to “Get to the Point!”

A well-defined vision. An engaging user experience. Measurable success factors. Proper governance. These elements, when combined, will allow you to provide an engaging and well architected end-user experience, in addition to enabling you to truly provide and promote informal learning within your L&D organization. It will allow you to “Get to the Point” of SharePoint, and concentrate on what is truly important—the end user.

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