

WHITE PAPER

Professional Services The SharePoint Angle

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As the head of the Professional Services division of an organization, there is a high probability that:

- Sales, forecasting and reporting
- Project management and
- Employee development

are some items of paramount importance in your mind. If they are not, please feel free to stop reading here. Else, read on...



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Professional Service Needs

Let's first look at each of the items mentioned in the introduction and see if we can break them down into specific representative needs, and then we will move onto the possible solutions. Once that is identified, this paper will elaborate on how you can go about getting those solutions implemented.

Sales, forecasting and reporting

- What are the deals in the pipeline?
- What are the timelines for closing these deals?
- Are the sales collaterals handy? Are they kept in an organized, searchable manner?
- Resource forecasting: In order to staff the impending projects, what types of resources do we need?

Project management

- What is going on with the project? Are we on time and on budget? What are the project details?
- How do we capture and manage time and expense entries?
- How can all of the documents related to the project be archived, in an easily retrievable manner?
- What is the best way to assign project related work and tasks, so there are no redundant entries which need to be checked every time a report is needed?
- Capacity planning - Are there any resources that are over/under planned?

Employee development

- Is there any automated place for employee self-service, or does every small request have to go through a few HR individuals, leading to a bottle neck?
- How do you catalog and organize the training options available to employees? Also, how do you track and manage which training session each employee attends?
- Is there any place where employee attendance can be collaboratively managed?

We can roll-up all the above needs into 2 high-level buckets:

- Team Collaboration
- Document Management

In other words, the need is for a software product which can be customized to suit your specific Collaboration and Document Management requirements. Is there a readymade solution that would address the stated objectives?

Microsoft SharePoint probably has the answers to this. But even before we get into how SharePoint can help us here, let us take a step back and ask a question



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Why SharePoint?

One has to agree that SharePoint is not the only such tool available in the market. There are other tools, and there are pros and cons to using each of these tools (including SharePoint). However, SharePoint is being picked up by a sizable number of end-clients because of its capabilities and very importantly, its perfect fit into the MS IT-ecosystem that they have in their organization; For example, SharePoint integrates extremely well with MS Office which is so ubiquitous.

Additionally, SharePoint is very much a highlight within the Microsoft radar; so one can expect more integration points with the various MS Line-of-Business (and other) systems, thus reducing the overall cost of setting up the IT enablers of your business.

Windows SharePoint Services (WSS) 3.0

Let's now get into the solution aspects of how SharePoint can be used to meet the above needs. In fact, we will consider the mentioned needs as a representative cross-section of your overall needs. So the solution discussion will point towards not just these needs but the overall gamut. For our discussion, we'll consider Microsoft Windows SharePoint Services 3.0 (WSS).

Microsoft Windows SharePoint Services (WSS) 3.0 is a versatile technology that organizations and business units of all sizes can use to increase the efficiency of business processes and improve team productivity. It also provides a foundation platform for building custom Web-based business applications that can flex and scale easily to meet the changing and growing needs of your business.

Here are some specific features, where SharePoint can come in handy:

- Provide creative forums for brainstorming ideas, building knowledge bases, or simply gathering information in an easy-to-edit format. Templates are available for implementing blogs (also known as weblogs) and wikis (Web sites that can be quickly edited by team members—no special technical knowledge required).
- Easily author and manage documents, and help to ensure their integrity with enhanced features. This includes the option to require document checkout before editing, the ability to view past revisions and restore previous versions, and the ability to set document-specific security.
- Help people and teams stay on track with a variety of communication features that let users know when actions are required or important changes are made to existing information or documentation, including announcements, sophisticated alerts, surveys, and discussion boards.
- Stay productive while mobile with enhanced support for offline synchronization through Microsoft Office Outlook 2007. Outlook can be used to manage document libraries, lists, calendars, contacts, tasks, and discussion boards, even when offline and can synchronize changes when reconnected to the network.



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In addition to the basic customizable platform, there are many Application Templates released for WSS 3.0. Application Templates are out-of-the-box custom scenarios tailored to address the needs and requirements of specific business processes or sets of tasks in organizations of any size. They also provide a jump-start for developers looking to build deeper SharePoint-based solutions.

SharePoint out-of-the-box features

Some application templates relevant to our discussion are mentioned below:

Sales and marketing related

- Integrated Marketing Campaign Tracking application template
- Sales Lead Pipeline application template
- Knowledge Base application template

Project Management related

- The Budgeting and Tracking Multiple Projects application template
- The Change Request Management application template
- Bug Database application template

Employee related

- Employee Activities Site application template
- Employee Self-Service Benefits application template
- Employee Training Scheduling and Materials application template

To slightly elaborate on some of them:

- The Sales Lead Pipeline application template helps teams manage the sales pipeline by tracking leads, opportunities, contacts, and accounts. Through role-based dashboards, team members can track sales information, assign open opportunities and gain visibility into the status of overall leads entered into the application template.
- The Budgeting and Tracking Multiple Projects application template helps project teams track and budget multiple, interrelated sets of activities. The template provides project management tools such as project creation, assignment of new tasks, Gantt Charts and common status designators. It helps team members consolidate the status of multiple projects into a single view, tracking progress against a set project budget and timeline.
- The Employee Activities Site application template helps manage the creation and attendance of events for employees. Activity owners use the site to review proposals for new activities and create event calendar items. Employees use the site to sign up as well as track which activities they've attended in the past.



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If your needs are largely related to collaboration and document management, then WSS 3.0, which is the free version of SharePoint, will suffice. But if your needs are more extensive, then you might want to go for Microsoft Office SharePoint Server (MOSS) 2007, which is built on WSS 3.0 but has a host of other advanced features. Your internal development team or your SharePoint vendor should be in a position to give authoritative inputs to enable your decision in this regard.

Vendor evaluation check-list

Here are some of the things that you could keep in mind for narrowing down your list of prospective vendors. This suggestion-list assumes that your SharePoint requirements are extensive. For a small-footprint SharePoint implementation, you can most probably make do with a vendor with limited expertise (or better still, get it done in-house):

- Check if the vendor has any standing in your operational space, since that will be crucial for your vendor to understand your stated as well as unstated challenges, and work out solutions to alleviate those.
- Does the vendor have consulting capabilities? Can they identify the cross-section within your IT eco-system where SharePoint can be implemented with maximum impact?
- Check if that vendor has a solid implementation team, because once the vanilla implementation of SharePoint is done, and the requirements for further customization have been identified, the next step would be to actually get into the architecture, design, coding and testing of the solution. Here, you'll need to ensure that the vendor has a proven track record in all of these areas, otherwise you will find yourself moving from pillar to post spending significant time (and money) coordinating for even the smallest things. You will also face issues in ascertaining ownership, especially when something goes wrong.
- Even if you are not looking for a turn-key solution, and just want a vendor to get in, finish a piece of work, and get out, you would still be better off short-listing vendors who have got expertise in all the levels of the value chain since they would be aware of the consequences of whatever they do in your IT eco-system.
- Also check if the vendor has not only enough depth in SharePoint implementation/customization, but also enough breadth in the related MS Technology stack. Again, you do not want to be in a position where you are getting SharePoint customization done by one vendor, the SQL Server work by another one, and CRM integration by yet another.
- Does the vendor have proven capabilities in the appropriate software development methodologies - Engineering as well as Project Management? You need to check if the vendor has a solid process background in Waterfall, Iterative, Agile etc, so that they can take a well-qualified decision on which would be apt for your specific needs.
- Any code that is developed needs to be tested. There are certain intricacies involved in 'SharePoint Testing'. So check if your vendor has that expertise.
- Check if your vendor has a Quality Management System in place, to ensure consistently good quality.
- Needless to say, check if your vendor will do all these at a cost that will not pinch you.



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Summary

We started by looking at a few issues commonly faced within the Professional Services setup of an IT company, looked at why SharePoint could be considered as a platform for building solutions to tackle those issues, and closed our discussion with how you could go about implementing those solutions. The intention behind this article was not to provide detailed solutions to each of the questions, but to provide the facilitating direction, so that, as a person heading the Pro-Services division, you can do some more due-diligence and take your own call on what makes sense for you.

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