



SharePoint GamePLAN

Presented by:
ShareSquared





GamePLAN: Objectives

Purpose:

GamePLAN is an onsite engagement designed to provide initial guidance around SharePoint usage and adoption. This engagement consists of three days onsite followed by a report of findings.

Objectives:

1. Knowledge Transfer to IT and Business stakeholders
2. Educate and excite users on SharePoint
3. Provide a vision of what SharePoint can do when properly configured
4. Discuss SharePoint as a platform of content and information lifecycle management
5. Provide roadmap of next steps for continued adoption and value realization



GamePLAN: Focus Areas

Use Cases to Explore:

1. Reduce time-spent searching for documents
2. Implement SharePoint records management
3. Migrate out of Legacy ECM System
4. Enhance internal collaboration
5. Improved Process Management and Workflows
6. Imaging and Capture to SharePoint

GamePLAN: Schedule for the Week



Sessions focused on...

- **Envisioning:** Designed to show the platform in action and help support functional and departmental sessions
- **Functional:** Deep focus on one stage of the content lifecycle with members of the core group
- **Departmental:** Deep focus on the full content lifecycle with members of a single department

Day 1 (Intros and Envisioning)

SESSION 1: GamePLAN Kickoff

Introduction and GamePLAN Kickoff

Goals and Objectives

Review the week plan

Discuss departmental use cases

Risks/Challenges/Outcomes

Audience: Core Team and Executives

SESSION 2: Information Architecture

Intro session and review goals/outcomes

Discuss: Existing IA

Discuss: IA for ECM/RIM

Discuss: Best practices

Discuss: Taxonomy/Term Sets

Audience: Core Team

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Day 2 (Functional)

SESSION 1: SharePoint Doc Management

Intro session and review goals/outcomes
Discuss: Document Management
Discuss: Enterprise Search
Discuss: DMS Structure
Audience: Core Team

SESSION 2: Capture and Imaging

Intro session and review goals/outcomes
Discuss: Electronic Capture
Discuss: Email Integration
Discuss: Third Party Capture Options
DEMO: Imaging, Capture, Capture Server, Adv. Capture
Audience: Core Team

SESSION 3: SharePoint Compliance

Intro session and review goals/outcomes
Discuss: Native RIM Functionality
Discuss: eDiscovery and Archiving
Discuss: Third Party RIM Options
Exercise: review RRS/File Plan series
Audience: Core Team

SESSION 3: Dept. Drilldown: Executive Mgmt.

Intro Session and review goals/outcomes
Pains/Challenges/Outcomes
Demo: Lifecycle of a document
Create, Declare, Send to Record Center, Search, Disposition
Capture/Imaging
RIM OOTB
Audience: Core Team and Executives
Understanding of SharePoint and Records Center

- Current Environment and Future Environment
- Limit technical details
- Needs to be reviewed with Core Team on DAY 1

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Day 3 (Functional/Drill Down)

SESSION 1 SharePoint Process Management

Intro session and review goals/outcomes
Discuss: Native Workflow functionality
Discuss: Native Forms functionality
Discuss: Third Party WF/Forms Options
Exercise: target top processes
Audience: Core Team

SESSION 4: GamePLAN Closeout

Discuss the week
Review goals and objectives
Audience: Core Team

SESSION 2: Dept. Drilldown: IT

Intro session and review goals/outcomes
Pains/Challenges/Outcomes
Determine Initial Scope
Audience: Core Team, IT