



# Content Panda for SharePoint

EBOOK – THE 4 STEPS YOU NEED TO IMPLEMENT CHANGE MANAGEMENT WITH SHAREPOINT



## Introduction

It's a difficult business environment today – companies everywhere are reinventing themselves in order to become more nimble to the rapid changes digitizing our society. We live in an app-driven world, where people expect consuming services and buying products to be one tap or swipe away.

Consumers expect a new relationship with businesses, which means that businesses need a new way to work – one enabling them to access information quickly, collaborate rapidly, and do so on any device at any time.

Legacy file shares and enterprise content management platforms won't cut it, which is why many companies are turning to Microsoft Office 365 and Microsoft SharePoint to improve the speed and quality with which they work. Nearly 60 percent of companies surveyed by the Association for Image and Information Management (AIIM) stated they would incorporate Microsoft's cloud solutions in the near future. For many that are still on SharePoint 2010, moving to either SharePoint 2013 or SharePoint 2016 will require a massive change.

However, SharePoint isn't the Field of Dreams – if you deploy it, your employees won't automatically flock to the software. SharePoint may meet your technical requirements, but only when users adopt and embrace it will your deployment truly be deemed a success. When you don't implement a change management plan to help your knowledge workers adopt new technology, productivity plummets, focus on your customers wane, employee morale rapidly declines, and more money is spent on help desk support. Here's a cautionary tale...

*Six years ago, a federal civilian agency headquartered in Washington, DC, decided to migrate all of its files from its existing EMC Documentum platform to Microsoft SharePoint – six months before the license was set to expire.*

*Due to the extremely short timeline, the agency worked with its IT contractor and department managers to set up a SharePoint site that looked as close to its existing Documentum solution as possible. They would train employees after completing the migration, so they figured if the SharePoint site looked like Documentum their employees wouldn't be completely lost.*

*On a hot summer weekend at the end of July, the agency turned off Documentum and cut over to its new SharePoint instance. There was no turning back.*

*The following Monday morning, chaos reigned throughout the agency. No one knew how to use SharePoint. Employees couldn't find their important files. Many swore up and down they didn't even know SharePoint was being installed, even though a single email had been sent to everyone 45 days ahead of the migration.*

*Two weeks later, the situation deteriorated even further. Work at the agency grinded to a halt. Only 10 percent of employees could do at least part of their jobs again.*



*After the first month, desperate employees were downloading the files they needed to do their jobs to their desktops and keeping them there – defeating the purpose of installing SharePoint in the first place.*

*Six months later, the agency was still only half as productive as it was prior to the SharePoint migration. Heads rolled. The IT contractor was removed. Several agency managers were released. Many senior employees – with their years of proprietary knowledge – left the agency.*

*With new employees, would the SharePoint implementation get better? Today – six years later – SharePoint only used by less than 15 percent of the agency.*

In this eBook, we'll give you the benefit of other companies' hindsight – why SharePoint has failed and what you can do to make sure you don't become another statistic. Then, we'll explain the four steps you must take to implement a change management program that will educate, excite, and inspire your users to transform the way they work so your organization can continue to complete and excel in this hypercompetitive business landscape.

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## About Content Panda

Established in 2011, Content Panda is headquartered and maintains its principal operational center in the San Francisco Bay Area, with offices in Maui, HI, Seattle, WA and Vancouver, BC, Canada. We serve our customers worldwide with our direct account support and through strategic alliances with consultants, systems integrators and reseller partners. Our software is made in the USA.



- Content Panda is a managed Microsoft Partner.
- Content Panda is part of the Microsoft Office 365 Technology Advance Preview receiving early updates and working directly with the Microsoft Office 365 and SharePoint product teams.
- Content Panda's in-context and on-demand help and training solution is US Patent Pending.



## Why do SharePoint implementations fail?

Microsoft SharePoint has undergone a transformation in the last several years, from a glorified file share into a digital workspace and universal interface supporting document co-authoring and information sharing as well as integrating with virtually all enterprise information sources.

The technology is there, but in many cases, the adoption is not. According to AIIM, nearly half of companies report their SharePoint implementation was unsuccessful. Why? Sixty-seven percent say inadequate user training is to blame, while 64 percent say there has been a complete lack of senior management support. If you think this sounds like a process and planning problem, it is: 58 percent of respondents say change management is the major issue for user reluctance to use SharePoint – more so than the lack of technical expertise (51 percent).

It's not simply about looking at your old content platforms, migrating information over to your new SharePoint platform, and giving users the keys. While that can be difficult enough in itself, there is a great deal of work that must happen before you light up SharePoint and announce its arrival in your company.

In the coming pages, we'll focus on the four steps to ensure your change management project for Microsoft SharePoint is a success:

1. Planning and sponsorship
2. Awareness
3. Learning
4. Readiness and adoption

### Planning & Sponsorship

*"If you fail to plan, you are planning to fail." – Benjamin Franklin*

While he may have never even conceived what a computer could do, he knew if you didn't lay the proper foundation before major change, it would be difficult – if not impossible – to make that change stick. There must be respected people in power who give their endorsement and drive the case for change home.

Within planning and sponsorship, there are four important points you must address before you can even think about letting your knowledge workers in on your grand plan:

1. Engage executive sponsors
2. Articulate the business case
3. Define behavior changes
4. Establish success criteria

### Engage Executive Sponsors

Change starts at the top, and it's no surprise that of the companies with failed SharePoint deployments, lack of senior management support was one of the top three reasons for its demise.



Companies taking the time and energy to secure executive sponsors who will actively communicate the value and benefit of SharePoint are more likely to be successful with their rollout. You need to find an executive sponsor – preferably someone with either a SVP or C-level title next to their name – who can drive “top-down” messaging and act as an active communicator on the value and benefits SharePoint offer throughout your implementation.

Your executive sponsor’s job in a SharePoint rollout – besides having their name at the bottom of communications introducing the new platform – includes the following:

- Encourage usage and emphasize that it’s supported for the organization
- Articulate value proposition across the executive team
- Serve as a role model
- Participate in network engagement events to help launch the effort

As you think about who this senior executive should be, we want to caution you to stay away from the Chief Information Officer or Chief Technology Officer. Nothing personal, but you want to drive home the point to employees that this is a business initiative, not merely a technical one. When you put together your executive sponsorship dream team, in a perfect world your CEO will be on board, while the CIO or CTO act as key influencers who can show just how the new features and value propositions are demonstrated first-hand.

Once you have your executive sponsor in place, have a project team including executives and department leads across the organization so that this is a truly enterprise change management initiative.

### Articulate the Business Case

We can’t stress this enough: SharePoint must be seen as a *business solution*, not just a new technology. SharePoint isn’t a new card access key to your office building – treat it with the respect it deserves.

This means you must be able to clearly explain why you are moving to SharePoint. This way, you can frame the rest of your change management initiatives within this context. Basically, this step will be your guiding light for every other stage throughout this eBook.

You’ll want to start by defining goals that will give you the greatest return on your investment. What are the quick wins you can show to the rest of the business that will inspire and excite them to use SharePoint? Once you’ve defined your goals, they are the foundation for a subsequent awareness campaign.

As you are meeting with your project team, use these discussion questions as a starting point to shape your business case:

- What are the most important reasons for deploying SharePoint?
- Which goals (shoot for three to five) would make it evident that the rollout is successful?
- What are our expected benefits and challenges? How will we measure success?
- What are the challenges we should account for as we continue to plan our SharePoint rollout?



## Define Behavioral Changes

In order to truly change anything, you have to change the way people act. In a business context, if you are completely overhauling the technology employees use on a daily basis to do their jobs, you will have to specifically outline the actions you want them to start doing, stop doing, and continue doing.

Common fears our customers report hearing from their employees as they work on a change management initiative include:

- The new technology will force them to change their tried-and-true daily processes.
- Looking stupid to their peers if they ask too many questions or can't learn to use the new software.
- The learning curve will be so steep that it slows down their performance.

These fears cause a lot of stress, which then turns into conversations amongst themselves that saps time and drains business productivity. That's why you must be very, very specific: For example, let's say you want employees to work together more openly on teams and projects. You want them to start using shared workspaces for project files and communicating in shared forums to build history and ramp up new members quickly. You want them to stop using email attachments to send files and discussing projects in small groups and email.

Call out the elephants in the room – not only will employees read these behavior changes and nod their head in acknowledgement, it will mean they know you know exactly what it is they are doing and why it's not working.

Here are a few questions you can ask your project team to come up with the right behavior changes and subsequent actions:

- What are our goals for SharePoint?
- What behaviors will employees need to adopt to support those goals?
- What will employees need to start and stop doing to exude those behaviors?

It's vital you determine the key behaviors because it will help you focus your subsequent awareness and training materials on the actual tasks you need your users to learn on SharePoint.

## Establish Success Criteria

When you develop these goals and objectives, it's important to have a formal set of success criteria to measure the impact of your deployment. Determine what should be measured, and how you'll collect this quantitative (numbers-driven) and qualitative (anecdotal) information.

Pro tip: Choose criteria that will perk up senior management's ears, and keep the list between five and 10. More than that, and eyes start to glaze over. You can measure virtually anything, but it shows true thought and planning if you can decide which metrics matter and which ones don't.

While your success criteria will depend on your specific business needs, there are several you should include such as user satisfaction, employee engagement, and adoption velocity.

Use the SMART goal mnemonic to guide you:



- **Specific:** clear and unambiguous
- **Measurable:** concrete
- **Attainable:** realistic
- **Relevant:** matters to stakeholders
- **Timely:** grounded to specific target dates

By measuring changes that occur as a result of rolling out SharePoint, you will have a way to quickly track what's working, what's not, and what you need to fix. You can't manage what you don't measure.

## Drive Awareness

*"You can have brilliant ideas, but if you can't get them across then your ideas won't get you anywhere."*  
– Lee Iacocca

The former CEO of Chrysler was onto something. A good awareness campaign informs, engages, and inspires your users to be the change you wish to implement in your company.

Don't mistake awareness for simply creating "buzz", though. Flash mobs won't drive sustained behavior changes. You need to create an awareness plan clearly allowing employees to see the value of SharePoint and how they'll benefit by using it.

Awareness must happen before, during, and even after your SharePoint rollout – so your communication strategy has to be proactive and account for this reality. It's important you find the right people, the right messages, the right channels, and the right cadence.

In order to strike this balance, ace these four points:

1. Inspire new behaviors
2. Plan communication tactics
3. Organize change management champions
4. Open feedback channels

## Inspire New Behaviors

You already established which key behaviors you want employees to exude – now is the time to focus your communications on the essential scenarios and subsequent tasks they will need to learn. Keep it to no more than 20 tasks, so you can dive deep instead of creating an environment where employees are holders of many and masters of none.

Studies find it can take at least 21 days – three weeks – for someone to truly break or adopt a new habit. If you have employees used to working a particular way for years, you can't expect to only send one email and conduct a three-hour training. Develop your initial plan, and then think about how you can revisit your communications throughout a prolonged period of time – say, one year – and keep interest high.

Here are some leading questions to help you frame your thoughts:

- What do we want users to do?





- How do we want users to be inspired?
- What are some success stories and scenarios we can communicate so that our employees can relate?
- How, when, and to whom do we communicate each message?

## Plan Communication Tactics

You can't just send one email announcing SharePoint and expect that it will promote lasting change.

You can't just send one email announcing SharePoint and expect that it will promote lasting change.

See what we did there?

You need to create a set of communication tactics reinforcing your key messages over a period of time – and in different channels – that will inspire, inform, and motivate your target audiences to use SharePoint.

Here are three things to think about as you plan out communication tactics promoting your message of SharePoint:

1. *Identify your target audience(s):* Executives, departments, individual contributors, partners ... the list can go on depending on the scope of your launch.
2. *Think about the different ways you can communicate to your target audiences:* Use internal email newsletters, flyers, videos, town halls, lunch-and-learns, booklets, posters and more. Make sure there is a healthy mix of in-person and virtual communications.
3. *Think about the cadence:* How often will you be communicating to your target audiences? Depending on the culture of your company, this can vary widely. We strongly advise you to go light on email, though. The more you bombard people with the same message in the same medium, the easier it is for them to ignore you.

## Organize Champions

Executive sponsorship is important for helping drive importance and the case for change throughout your organization in a “top-down” manner. You must have this otherwise SharePoint will fail, plain and simple. We already witnessed this through the 64 percent of AllIM survey respondents stating lack of senior management support was the key reason for failure.

However, as we've explained how you should diversify your communication strategy – you also need to diversify who you have inspiring employees to adapt to change. This means recruiting SharePoint champions, employees who provide informal training and support to others in your company, to create a learning community. You've heard of “early adopters” who always have the latest iPhone – but SharePoint champions help penetrate the “never adopters” who absolutely refuse to ever use a new thing, as evidenced by their flip phone with no connection to the Internet.

The beauty of having SharePoint champions is they can support employees on a peer-to-peer level. It's much easier to instant message Kyle in accounting to help you set up a team site than it would be to work through your CEO Kathy's assistant.



These SharePoint champions should expect to spend a few hours each month performing this very important service. Make sure you create a foundation for them to maximize this precious time away from their daily job functions:

- Create a distribution list to give champions a way to share information and provide feedback to the project team
- Set up a blog or wiki for champions to monitor and update
- Empower champions to create and share training recordings as well as leading face-to-face sessions with groups of employees
- Enable champions to incentivize good SharePoint behavior exhibited by employees with gift cards, T-shirts, or other exclusive items

## Open Feedback Channels

Throughout your SharePoint implementation, offer employees a forum to ask questions and give feedback. This is the only way to learn what works, what is failing, and how you can specifically fine-tune your implementation to maximize success.

Speed is of the essence – consider creating a feedback and triage team to address employee inquiries quickly. You don't want employees to lose steam because it takes three days to answer a question about how to upload a document to OneDrive.

The more inquiries you have come in, the easier it will be for you to group common ones together and provide a Frequently Asked Question list to highlight to save employees the time of having to request help. Post the FAQ on your internal site, and assign a feedback team to update it regularly.

There are also available software solutions that can deliver help in-context, right at the moment of truth when employees are trying to perform an action in SharePoint, that can help give them the answers they need immediately so they can continue doing their jobs using this new way to work.

The methods may differ, but it's important you set up an environment to take questions and feedback that is proactive, nimble, and easily adaptable.

## Instill Learning

*"An organization's ability to learn, and then translate that learning into action rapidly, is the ultimate competitive advantage." — Jack Welch, former General Electric CEO*

Employees have heard about SharePoint thanks to your executive sponsors, and they've seen the platform in action thanks to your champions. Now, it's time to build on the excitement and anticipation by offering a multitude of training options enabling employees to be productive using SharePoint right away.

Remember most workers hate change of any sort. There's a tremendous level of stress and fear involved with any type of change in the workplace, much less an entirely new technology platform. Training is one of the most important arrows in your change management quiver to mitigate employees' fear and stress.



Create a holistic training plan accommodating the different learning styles, geographic challenges, resource constraints, and roll-out strategy you have. Take into account what functions in SharePoint you're implementing, the important tasks you want employees to learn, behaviors you want them to practice, and also how much money you have to do all of this.

There are four steps to craft a holistic training plan:

1. Know your audience
2. Sketch out a training schedule
3. Deliver training
4. Open feedback channels

## Know Your Audience

This seems obvious, but considering training is the top reason why SharePoint implementations fail, let's start with the basic who, what, where, when, how, and why of training:

- **Who:** Which groups, teams, and departments are you training for SharePoint? Focus your training on the people who will actually use this platform day in and day out.
- **What:** Determine your employees' roles, tasks, and permissions levels. For example, you don't want to teach an accountant the ins and outs of Active Directory configurations.
- **Where:** The beauty of digitization is we can work anywhere, anytime, on any device. Make sure you know which users will be on tablets, mobile devices, and in the office using a workstation – and tailor your training accordingly. The SharePoint experience is different for all of these form factors.
- **When:** Will users perform tasks in different time zones – for example, a project team has resources in New York working on documents that colleagues in China will access 12 hours later? Does training need to be completed by a particular date – either for projects or user roles?
- **How:** Will SharePoint be integrated into everyone's day-to-day job activities? Will organizational policies be affected by SharePoint's entrance into your company (e.g. sharing documents, storing files, collaborating with external partners)?
- **Why:** You must explain why change is happening, why they need to care, why they need to change, and how they will benefit. This is arguably more important than the "how-to" information for performing tasks.

## Create a Training Schedule

Every company is different, but there are consistent guiding principles for creating a training schedule. Account for the time necessary to create multiple phases and it will take several months to implement. Expect to go through the following training phases: planning, pilot, awareness, training, follow-up and support. We will give you general timelines from our experience helping companies implement SharePoint, but they are not set in stone.

### Planning

You will likely need to give yourselves two or three months to plan prior to launch. Here is your five-point blueprint for creating a successful training plan:



1. **Lead with benefits:** Explain what their work will look like in this new world of SharePoint, and the efficiencies and benefits they can expect in comparison to their old way of working.
2. **Use real work scenarios:** Use tasks or business processes familiar to your audience as a way to draw them into the feature-specific information.
3. **Include your governance model:** It seems boring and legalistic, but it's important to integrate information about the rules, processes and best practices your organization put into place around the SharePoint deployment so proper boundaries are set.
4. **Create a learning center:** Use an internal team site (on SharePoint!) to store training resources such as Getting Started guides and Tips & Tricks videos.
5. **Mobilize champions:** Call upon your network of champions to provide coaching and assistance across their teams.

### *Pilot*

Budget for at least six weeks prior to launch to develop and/or curate materials, including instructor guides. This is a prime opportunity to test the effectiveness of your training and help materials.

Your guinea pigs for this training phase should include IT professionals, the support team (including help desk and SharePoint champions), and early adopters. You can use their feedback during this phase to identify any gaps in training so when you begin your larger-scale rollout of SharePoint you have already taken the time to assuage these issues.

This is also the time to review and approve learning center designs and help content, reviewing it for accuracy and relevance to your audience and training goals.

### *Awareness*

Give yourself a couple of weeks for this phase. This is when you start training the wider support team and executives. It's important they understand SharePoint, the issues users may experience, and the requisite resolutions.

Remember that FAQ page we asked you to create for SharePoint champions? Now is the time to compile more of the common questions you hear during this early training to outline common issues the support team will likely need to address.

It goes without saying that, just as you did during the pilot, you incorporate any learnings from this phase into your training materials and learning center before launch.

### *Training*

Launch day is finally here! We'll get into the ways you can train in just a couple of minutes, but this is when you begin your phased rollout of training to end users based on the adoption and training plan you've put in place.

### *Follow-up and Support*

This will happen for at least the first couple of months after you launch. Learning is lifelong, even though you need your employees to start using SharePoint as soon as possible. This is when you start collecting metrics on usage, adoption, and satisfaction. This will help you understand the health and effectiveness of your training – and subsequently your rollout and adoption program.

## **Deliver Training**



Training comes in all shapes and sizes. We'll go into some of the most commonly used training methods below, but remember you will need to strike the right balance between showing the "how to" and then supporting the training long after it's completed.

Depending on the amount of time, facilities, equipment, geography, and money you have, you could consider using some of the following methods:

- **Classroom-style:** This requires an instructor guide, student guide, presentation, resource guide with helpful links to further information, and contact information for SharePoint champions.
- **Small group demonstrations:** Make sure you have a presentation for the group that's customized to address actual scenarios and tasks that are applicable to your audience.
- **Online training:** Include videos, articles, FAQs, checklists, and contact information for SharePoint champions.
- **On-the-job training:** You'll need task-specific job aids, checklists, and contact information for SharePoint champions.

We've found the most successful training incorporates all of these different methods, with a clear method for employees to request help or further information after the training is completed.

### Open Feedback Channels

Just as you did when you started communicating awareness around your SharePoint implementation, make sure you keep the lines of communication open after you've completed your training so users continue to feel supported.

Consider having an internal online group – you can use Yammer, Office 365 groups, or integrate SharePoint community features – that gives you an outlet to share best practices, establish topics of interest, participate in discussions, and build community among users.

### Readiness and Adoption

*"I get by with a little help from my friends." – John Lennon*

Throughout your SharePoint deployment, you've been collecting feedback, keeping a close eye on usage and acceptance, and iterating your plan as necessary.

Now, you need to do three things:

1. Provide ongoing support
2. Assess user satisfaction
3. Measure usage and adoption

This is an "all play" – your entire project team should be working tirelessly to ensure every department is ready to support new users. Help and support teams should be ready and able to troubleshoot problems that users encounter. You should also document your key learnings, areas for improvement, and bring this all together to iterate your rollout so it goes even smoother for the next wave of adopters.

### Provide Ongoing Support



Your support and help desk is the first line of defense against users encountering SharePoint problems. It's vital to empower and inspire these teams to do their best work, as the level of support a new user receives can directly impact just how satisfied they are with SharePoint – and how deeply they adopt the platform.

No matter how good your training is, you can expect to receive a lot of questions as users start to really dig into SharePoint. We understand that for your support and help team, this may be only part of their job. Establish an automated system so you can reduce the total number of inquiries support teams receive. For example, if you have a very clear FAQ or online training portal users must go to first before submitting an inquiry, it may relieve a significant portion of questions so the help desk is only focused on troubleshooting deeper issues.

Here are some other tips to ensure your support and help desk teams are ready to successfully support new user inquiries:

- Ensure all help desk agents are properly trained to support SharePoint inquiries calls prior to your company-wide deployment.
- Set up automated prompts on your phone or online support system, to get users to the most appropriate support team quickly.
- Establish an alert system to notify your help desk when issues arise or for planned downtime, so that they can effectively assist users.
- Detail your Service Level Agreement plan to hold support representatives accountable for following up with end-users and setting the right expectations.
- Provide your support and help desk agents with the most up-to-date troubleshooting information, including a customized FAQ.

### Assess User Satisfaction

It's worth repeating: You can't manage what you don't measure. Consider it a requirement to regularly assess just how satisfied new SharePoint users are, as satisfaction has a direct correlation to adoption and usage.

Throughout your pilot and live rollout, distribute user satisfaction surveys to gather data about your users' knowledge and experience with SharePoint. This way, you can quickly understand where you are succeeding and failing, and even better, iterate rapidly so you can improve the experience for the next waves of users you onboard to SharePoint.

Here are some helpful tips for when and how to survey end users:

- Send a baseline survey assessing users' knowledge of SharePoint shortly before the end of your pilot.
- Release a survey half-way through your pilot and your rollout periods to gather data about users' knowledge and experience of SharePoint. Use the results from this survey to adjust and test your processes prior to a general rollout.



- Use a final survey immediately after the pilot period has completed to inform a go/no go decision and determine whether you need to make adjustments to your general training and awareness materials.
- After rollout, use a final survey to assess user satisfaction with the rollout process. You can release this survey 90 days after launch, and then in quarterly increments to help measure user adoption from a satisfaction and productivity standpoint.

## Measure Usage and Adoption

Satisfaction is important, but at the end of the day the success or failure of your SharePoint deployment will hinge on two factors: how often are employees using the platform and how many of them have actually adopted it.

You should start collecting this information before you even roll out SharePoint – this way, you can establish baseline metrics for which you can benchmark against at pre-determined intervals after you begin the rollout.

Usage and adoption metrics take time to become truly digestible – it will take six months or longer, since user adoption will not happen overnight. It's best to match your reporting timelines with how you report other major impacts to your business, which could be either monthly or quarterly.

There are several ways you can measure the success of each phase of your rollout, and you should incorporate all of them so you get a robust set of quantitative and qualitative data. You can use feedback and survey forms, product-related games, and recommended usage reports. SharePoint and Office 365 administrators can also access information about the services used, such as mailbox usage, audio/video conversations, program sharing, remote assistance, and amount of information stored on OneDrives.



## Content Panda: Your Change Management Lifeline

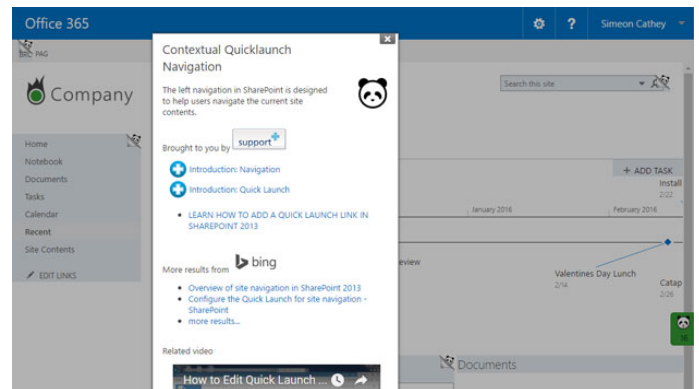
### Content Panda for SharePoint

Content Panda is technology that delivers a superior SharePoint user experience. A superior user experience starts with great content, in-context. Accelerate user adoption; simplify training and support; and promote governance inside SharePoint.

#### Accelerate User Adoption

Content Panda for SharePoint provides users guidance in their day-to-day tasks by offering a variety of in-context training materials to match their learning preference.

Whether they're submitting a leave request or creating a new team site, users can just click the panda to access a variety of tools to help them consume information either via video, step-by-step guides or computer based testing.



Content Panda for SharePoint creates confident users by giving them in-depth, flexible help and training—whenever and wherever they need it.

Foster confident, self-empowered users who:

- Consume your corporate information instead of searching
- Collaborate more
- Leverage more SharePoint features

#### Simplify Training & Support

Content Panda for SharePoint brings the best content into focus.

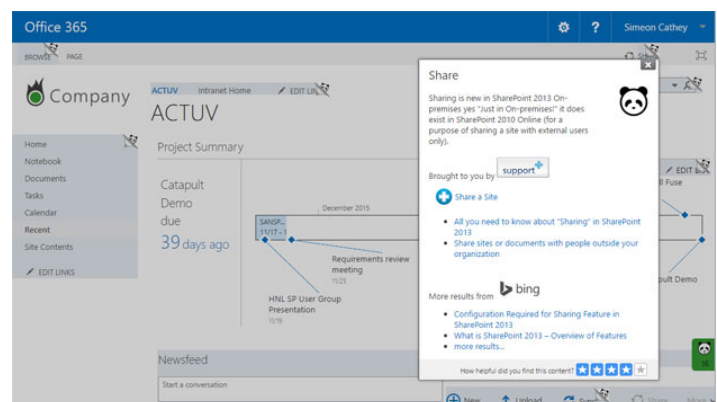
Users just click the panda wherever they need help, to get access to:

- In-depth training content, videos and best practices
- Microsoft-approved help content
- Curated support articles

Employees can learn as much as they want, whenever they need to—without asking someone for help.

Context-sensitive, self-service support for end users means:

- Fewer help-desk tickets
- Better knowledge retention







- No workday interruptions for classroom training

## Promote Governance & Business Practices

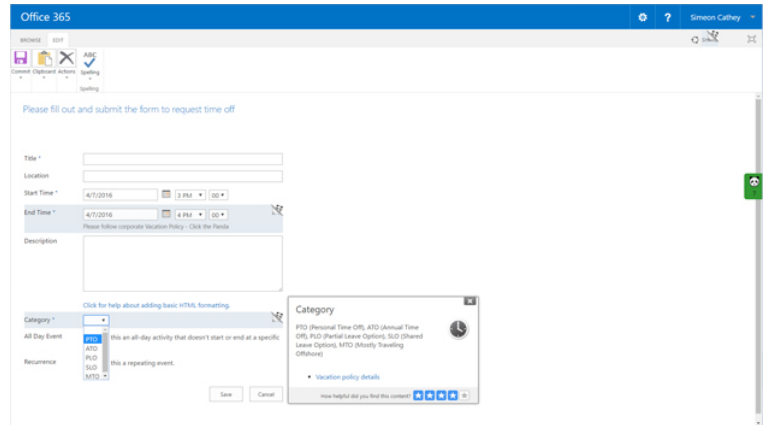
Support your business processes by sharing relevant information at the exact moment they need it.

Deliver your company’s own content to users in the same context-sensitive format:

- Best-practice policies
- Document requirements
- Embedded help on forms

Reinforce governance and steer best practices by making information available where it actually applies: in the forms, libraries and sites where the work is done.

Embed useful information in complex forms, within project sites, HR portals and anywhere else you want to influence user behavior.



## Centrally Manage the User Experience

Leverage Content Panda’s one-stop-shop management console to customize your SharePoint training and adoption experience.

With the Content Panda management console, administrators can:

- Supervise content creation, modification and usage
- Quickly manage permissions and branding
- Create content packs for audience targeting
- Receive and apply Content Panda product updates automatically
- Access user analytics reports

Make platform-wide changes quickly for your entire SharePoint environment, including support for hybrid scenarios where on-premises and online SharePoint is deployed.

## A Content Panda Change Management Success Story

Just as we began this eBook looking at a SharePoint change management gone wrong, here’s an example of how you get a SharePoint deployment right with Content Panda:

*A global science and engineering firm – already heavy users of SharePoint 2010 for content management and collaboration – decided to upgrade to SharePoint 2013. With only 2.5 full-time employees dedicated to the SharePoint upgrade, it was difficult for the IT team to focus on higher-value activities. Help manuals and videos for the most basic SharePoint questions are very time consuming to produce.*



*After deploying the first wave of users on SharePoint 2013, the IT team received 364 support tickets – most of which were similar basic questions about the platform’s new user interface and features.*

*The firm sought third-party training alternatives for its overburdened IT team, including Adobe Robohelp and WalkMe. Robohelp only enabled the IT team to update traditional support manuals very few end users read because they did not provide in-context help when and where users needed it as they navigated SharePoint. Additionally, WalkMe’s requirement to implement browser add-ons and plug-ins for anyone creating help tutorials added even more complexity the IT team could not handle amidst the massive SharePoint upgrade.*

*The firm then implemented Content Panda for SharePoint, which enabled the firm’s IT team centrally managed the entire SharePoint training and adoption experience for end users – including content creation, permissions, branding, and audience targeting. Content Panda helped the firm deliver in-depth training by online SharePoint education leader Combined Knowledge, Microsoft-approved help content, and other support articles in multiple media formats such as traditional articles, screenshots, and videos. All users needed to do was click on the Panda when navigating SharePoint, which delivered in-context help right when they needed it.*

*With Content Panda, IT support tickets dropped by 77 percent to 85 – realizing a 5x return on its investment in just one month. Content Panda is now instrumental to new users adopting SharePoint, based on the company’s recent agreement to acquire another large multinational company.*

## Customer Success at Content Panda

We understand there are business challenges you need to conquer and metrics you need to attain, which is why we created our Customer Success Program.

We distill best practices to deliver actionable advice and support to help you achieve quick and sustainable results.



## Dedicated coaching

As a Content Panda client, your dedicated Customer Success Manager becomes an extension of your company's team by learning about your SharePoint business goals, initiatives and upcoming plans to help you create a programmatic strategy for leveraging content.

## Your first 90 days with Content Panda

To ensure our customers are properly on-boarded and set up for success from the get-go, we have developed an intensive program for your first 90 days with Content Panda. Our training has a heavy focus on getting you creating and surfacing great content quickly, while leaving you with a scalable model for easy future publishing.

Make content publishing programmatic



The most important part of any type of initiative is consistent implementation for a steady stream of results. Your Customer Success Manager will help you create a program integrating Content Panda across your SharePoint efforts to create an engaging user experience, drive consistent results and increase adoption.

### Measuring metrics for success

Our team takes time to learn about your goals and metrics for success, ensuring your effort is delivering outstanding ROI. Your Customer Success Manager will hold regular analytics review meetings with you to determine what is working as well as share recommendations and best practices drawn from our growing network of customers.

### Next Steps

Now that you have learned about all the features and benefits of adopting Content Panda into your Office 365 and SharePoint environment, connect with us. Our Content Panda team is ready and waiting to say hello. [Book a demo and receive a trial license today](#), or feel free to email us at [sales@contentpanda.com](mailto:sales@contentpanda.com).

Thank you for your interest in Content Panda for SharePoint.