Content Panda for SharePoint

EBOOK – FOUR STEPS TO ACE YOUR SHAREPOINT MIGRATION

Table of Contents

Introduction

It's no secret that the relationship between consumers and businesses – as well as those within a company's walls – is rapidly transforming thanks to today's disruptive technology trends. Processes that once took weeks and reams of paper to complete are a simple swipe, tap, or click away. Individuals, particularly millennials, prefer to text, email, or instant message rather than pick up the phone and talk to people.

Consumers subsequently 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.

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, it is not as simple as buying a collaboration platform, moving some content over, and turning it on for everyone to use. Of the companies that have already begun a move to Microsoft SharePoint, more than half of companies surveyed by AIIM state their implementations were not successful.

How can we learn from the failures of the past in order to create a brighter future for collaboration, communication, and business?

This eBook will explore in greater detail why SharePoint implementations have failed and provide a blueprint with four specific steps you should take to ensure you don't migrate to SharePoint in vain.

Why Do SharePoint Migrations Fail?

More than half of companies surveyed by the Association for Image and Information Management report that their SharePoint implementations were unsuccessful. More than a quarter of these organizations say that SharePoint stalled in adoption, while more than a third state SharePoint is struggling to meet the original expectations of the decision makers who signed off on purchasing the platform in the first place.

When asked to pinpoint exactly where SharePoint is falling short, the responses were harrowing:

- 67 percent blame **inadequate user training**
- 64 percent report a complete **lack of senior management support**
- 60 percent state that **persuading users to manage and share content in SharePoint** and not elsewhere is the biggest ongoing issue
- 58 percent pinpoint the **failure to use basic change management strategies** during the implementation or migration as the issue leading to SharePoint's downfall
- 51 percent said that **lack of technical expertise** is to blame – both within IT and extending that expertise to the business users charged with using the platform

Since only 11 percent of companies can confidently say their SharePoint implementations were an unmitigated success, let's take a look at a real-world use case of how SharePoint migrations can go awry.

A global science and engineering firm, already a heavy user of SharePoint 2010 to manage its terabytes of content and collaborate across departments, decided to upgrade to SharePoint 2013 in order to take advantage of its updated user interface and new collaboration features.

The firm, however, only had a couple of full-time IT employees fully dedicated to the SharePoint upgrade, making it difficult for the IT team to focus on higher value activities. The process of updating help manuals and creating videos to answer even the most basic SharePoint questions was too time and resource intensive.

After the first wave of users were onboarded to SharePoint 2013, it was clear that the company's adoption strategy was not working. The IT team received 364 support tickets, most of which were similar basic SharePoint questions about the new user interface and features.

Knowing that the small IT team could not continue to support handling hundreds of help desk tickets for each wave of users onboarded to SharePoint 2013, the firm had to look for a third-party solution.

We will get back to this use case later in the eBook, but it is important to note that implementations are not just about moving bits and bytes of content and information over to your new SharePoint platform. That process can be difficult enough, but what do you do once that work is done?

The remainder of this eBook will explore the four steps you should take to make sure your SharePoint migration is successful:

1. Perform a phased migration.
2. Deliver a holistic training experience.
3. Design governance into SharePoint by default.
4. Prioritize and emphasize proper security with users.

Perform a Phased Migration

Migration is a fantastic opportunity for the IT team to work closely with the business to forge a tight partnership. As you are working hand-in-hand with business leaders to architect your move to SharePoint, remember that it's always best to not boil the ocean. You may be tempted to release your entire new SharePoint platform to all users immediately, but that's a recipe for failure.

Tame your excitement and release SharePoint in phases. This is a great time to act as a strategic advisor to the business and help them break down the long-term vision for SharePoint into multiple, smaller phases. For example, each phase can consist of just a few sites. The great part about conducting your migration in this way is it enables you to pinpoint the immediate scope and build the right information architecture, based on user requirements. It also helps you to take time to train users properly and address important user adoption obstacles in SharePoint, such as managing and sharing content in SharePoint and not elsewhere.

Also, keep in mind even the best plans do not always go as expected. By conducting a phased SharePoint migration, you can correct mistakes and pitfalls in one phase so that you do not repeat those errors in the next one.

There are six steps to take that will help you successfully phase your migration to the latest version of SharePoint:

1. Educate the business on SharePoint's benefits
2. Gather requirements
3. Construct information architecture
4. Map data
5. Configure
6. Perform a beta migration

Educate the business on SharePoint's benefits

This step seems obvious, but it is important to take time to educate yourself as well as your key stakeholders in the business on the benefits SharePoint can deliver to your company. You cannot decide what and how to create in the new platform without having a clear understanding of its capabilities beforehand.

Consider holding demonstrations to show line of business users how they can organize documents, build sites, streamline navigation, and take advantage of new features. Not only will you excite soon-to-be users, but it will also help them better visualize what their SharePoint sites could look like.

Do not move on from this step until you are completely confident that business stakeholders are educated and knowledgeable in the subject matter, as it will only add value to the future of your migration project.

Gather requirements

This is another great opportunity to forge a tighter partnership with the business: Work with them to gather the high-level requirements and better understand the use cases and business processes for SharePoint sites, libraries, and other functionalities they may request.

Don't get bogged down in the details during this phase. You want to make sure you truly understand the high-level vision of what your business stakeholders want. Gather enough information to understand the requirements necessary to proceed to the subsequent phases.

The best way to analyze and gather requirements is to have an interactive web or in-person meeting that includes a lot of back-and-forth and a lively question-and-answer session. Make sure no stone is unturned in this step.

Construct information architecture

Based on the high-level requirements you just gathered, now you should create a detailed information architecture design. Migration is a great time to learn from the past, clean up, and better organize content. Many deployments lacking early governance end up with unstructured content nearly impossible to manage. Migrations are a prime opportunity to reorganize and remove old, unused content while migrating to a new information architecture.

In this phase, document an overall taxonomy, metadata parameters, web parts, security configurations, navigation, and site hierarchy. This is your veritable step-by-step guide for when you move on to the configuration phase of your migration.

The information architecture document shouldn't be created once and then left to collect dust on a shelf (or buried in a hidden document library). You should constantly update this document as you go along, so you can help others understand just how SharePoint is structured.

Data Mapping

In a recent study, Gartner Research found 80 percent of companies' content was redundant when they performed a pre-migration analysis of their current SharePoint deployment. Why? The first version of SharePoint was released in 2001, and the average company has migrated through three versions of SharePoint. The fastest way to migrate is a database attach method, which essentially means you take your current structure and content and push it immediately over into the new version.

It is fast, but it is a short-term Band-Aid to a long-term problem of information architecture. It moves the problem and pain of reorganizing your SharePoint deployment to meet the current needs of your business to future versions.

Now is the time to stop this – map your current file share folders to new sites or particular folders to newly defined SharePoint metadata properties. This serves as a roadmap for the migration phase of the project.

Configuration

In this stage, you'll take your requirements and design documents created in past steps to create sites, libraries, metadata, views, navigation, and security groups.

Remember that while you may have already planned out how you would design the sites, as you are actually designing the sites you may encounter challenges for which you did not account. Make sure that you are in close contact with your business stakeholders to discuss any challenges and come to a resolution so that there are no surprises when you perform the first migration.

Perform a Beta Migration

Your first migration, call it a "beta", should be to the thought leaders, champions, and key stakeholders with whom you have already engaged. Allow them to use SharePoint with each other and explore it, showing it to their coworkers and building internal buzz.

This is also the best opportunity for you to measure results, adapt, and iterate for future migrations you conduct.

When areas of a portal are migrated in phases like this, mark the areas that have been migrated to read-only on the source or older version of SharePoint so that employees can still get to the old content for a period of time. Don't turn off your old collaboration platform cold turkey. Make sure you communicate clearly – and frequently – to users exactly when the old system will be decommissioned completely, so any remaining hold-outs and "never adopters" have plenty of warning.

Now that you've established a clear plan to phase your migration, it's time to educate the wider employee base on the benefits of SharePoint and how to use the platform. This can only be done through a holistic training program.

Deliver a Holistic Training Experience

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 quiver to mitigate employees' fear and stress.

Create a comprehensive 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.

Before we get into what you should do, here's why training isn't as simple as delivering one session and considering the job done:

- Inadequate user training (67%) is the top reason why SharePoint implementations fail
- Studies show that 70% of the knowledge gained in a training session will not be retained by students 24 hours after the training is completed
- Knowledge workers spend nearly three hours a day searching for information, precious time that could be better spent completing their projects
- The average attention span of a human being is 8.25 seconds, almost a full second less than a goldfish (9 seconds)

Despite employees having the best of intentions, they will not retain all the information they need to use SharePoint without having a way to ask questions or use help content afterward. Catering to this reality, here are the four steps to construct 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 several training phases that 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. When creating a training plan, remember to:

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:** 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 SharePoint champions – individuals who will deliver peer-to-peer help to their fellow associates learning how to use the new platform – 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.

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. 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

In this phase, 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. 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

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.

Design a Clear Governance Policy & Strategy

While it is never too late to create an information governance plan, it makes the most sense to create one before you begin your migration to SharePoint. This is another great opportunity for you to collaborate with SharePoint designers, engineers, and the business. Of the companies AIIM surveyed that had already started a SharePoint migration, half of them plan to update and better enforce information governance policies this year.

When many think of governance, they think of locking down features and functionality. This is incorrect. What does successful governance look like? Essentially, you want to create an environment where your users believe they're working the way they always do, but in reality they're working the way for which you planned. It's this sleight of hand that could make or break your SharePoint deployment.

This means giving users the features they need while maintaining very simple approval, monitoring, and tracking. Your governance plan should answer a simple question: How do you create an environment where users can create new workspaces, invite people into those workspaces, collaborate on content, and archive it properly when they're done?

Follow these steps to build governance by design:

- Don't put an end date on governance
- Define quantitative metrics for improvement
- Create a governance committee
- Write a formal governance plan
- Consider third-party technology to help with enforcement

Don't put an end date on governance

Forget the phrase "successful SharePoint governance". Success implies completion, and governance is never complete. Think of it as a governed SharePoint business improvement, which describes the perpetual cycle of improvement in a SharePoint implementation fortified by a solid governance plan and active committee.

Define quantitative metrics for improvement

Without clear statistics of what constitutes improvement, even the most well intentioned governance plan will fall flat. Have a quantitative metric for each policy or procedure outlined in your SharePoint governance plan.

For example, as SharePoint implementations become larger and less centralized, we have found that many companies have a hard time preventing other business units from placing the same content in multiple subsites. You can address this problem in your governance policy, and periodically measure the number of duplicate documents in the system. As the number decreases, it becomes evident the SharePoint governance policy addressing this issue is working.

Make it a point to consistently document and measure metrics to demonstrate the extent to which your governance plan is improving the overall SharePoint enterprise.

Create a governance committee

Information governance and management programs rank in the top five among the significant priorities for CIOs and fellow IT executives. SharePoint governance may be a smaller piece of the information governance pie, but it still requires oversight by your company's top leadership. SharePoint governance committees, the voice of the SharePoint governance plan, are comprised of business and IT leaders as well as senior management.

Even if you are able to put together a diverse cross-section of leaders, make sure you avoid these three common pitfalls we've found in our experience partnering with governance committees:

1. **Legitimacy:** Governance committees are considered *project-based* instead of *policy-making* bodies. The distinction is critical. An effective governance committee depends on its ability to make and, perhaps more importantly, enforce decisions and policies around all aspects of SharePoint technology and information.
2. **Resources:** Without the proper people and monetary resources at its disposal, the governance committee will be a paper-toothed tiger unable to enforce and socialize SharePoint governance through the channels necessary to maximize impact.
3. **Recognition:** In many companies, governance is not a full-time job, but it is definitely time consuming in addition to individuals' existing responsibilities. Recognize your governance committee members as going beyond their typical job responsibilities to participate in an activity vital to improving the entire company.

Write a formal governance plan

No plan is truly a plan until it's written down. Keep in mind that governance plans will evolve as your journey with SharePoint matures. There's also no single template for governance planning that meets everyone's specific needs. Governance will look differently in different organizations, whether due to their size, geography, or industry. Regardless, there are several core elements that your governance plan should make sure to include, such as:

- **Operational Management:** Operational management specifies the members of your governance committee as well as their roles and responsibilities for the larger SharePoint rollout. This defines the roles and responsibilities necessary to successfully deploying SharePoint.
- **Technical Operations:** Technical operations outline the basic technical structures, requirements and quotas for the SharePoint environment. Referencing existing SharePoint information architecture, service level agreements, and other technical details, it also lays out the authentication mechanisms by which users access SharePoint. For example, how do internal employees and external partners enter SharePoint? This is where processes for provisioning and de-provisioning access for users would live within the governance plan.
- **Site and Security Administration:** Unless you only have one site in your SharePoint deployment, you will need to govern the separate subsites (e.g. for Legal, Marketing, Sales) in different ways. While complex, it gives a more thorough picture of content governance. Site and security administration articulates the use cases for different site templates in SharePoint and dictates the procedures for actions including (but not limited to) site provisioning, site de-provisioning, site ownership and responsibilities, and permissions structures and best practices.

- **Content Administration:** Content administration covers a wide range of topics, including the differences between critical and non-critical content; guidelines for metadata usage; content types and workflows; content review cycles; content archiving and deletion policies; and the use cases for (and administration of) lists, libraries, pages, and web parts.
- **Personal and Social Administration:** If this sounds like a company social media policy for employees, that's because it is. Use your existing social media policy to inform this part of your governance plan. Personal administration suggests a user will be allowed to manage some aspects of her profile as well as store and share business documents in personal sites and libraries. Include quotas and storage limits for personal libraries in this portion of your governance policy.

Consider third-party technology to enforce governance

From an IT resourcing perspective, it is unrealistic to expect that one IT resource (or even team) can oversee the majority of the policies and procedures defined in the SharePoint governance plan given their other responsibilities. There are available software solutions that can help monitor and automate many of the scenarios you define in your governance plan, helping with enforcement.

Emphasize Security throughout SharePoint

SharePoint has excellent built-in security features that can extend your IT department's existing layers of firewalls, security software, and protocols to protect your organization. However, it just takes one user downloading secure documents onto their personal device and sharing them through unsecure, unencrypted email to delegitimize your IT team's efforts.

Migrating to a new version of SharePoint is a fantastic opportunity to drive greater collaboration and communication amongst your users to drive better business outcomes, but it is also the point of greatest risk. Why? Users frustrated with change are likely to revert to old, unsecure methods of collaborating, storing, and sharing content so they can continue getting their jobs done.

Without providing quick, easy access to training or help, users may put sensitive information in the wrong places, enabling unauthorized users who should not see the information to have access rights to it.

As you migrate to SharePoint, follow these five security tips:

1. Manage users in groups.
2. Don't use document or item-level permissions.
3. Educate users on the new "share" permissions.
4. Instill a single site administrator for each site collection.
5. Ask users to lock their phones and tablets as they would their workstations.

Manage users in groups

SharePoint is a very flexible, extensible platform and so is the security model built around it. You can define a security permission at virtually any "level" of the platform – from a site collection or site all the way down to a single item or document. You can assign these permissions directly to individual users, but doing so will create management headaches for years to come.

New migrations are a great time to review user access rights. The most common security flaw is creating overly expansive access rights. Follow Microsoft's own best practices and use the "Groups" functionality as much as possible when assigning permissions. This way, you have a more maintainable security model. When you have to adjust permissions – and you will have to do this throughout the course of your time with SharePoint – you can just adjust the group and not each individual person.

The other great feature to using Groups in managing user access is that you can easily add or remove users to the group without having to worry about their specific permissions levels.

Don't use document or item-level permissions

As we have already stated, SharePoint is a very flexible platform. It's a blessing and a curse. You can define permissions all the way down to a single document or item. *We strongly recommend you do not do this.* It's not easy in SharePoint to get a high-level view of all the single item-level permissions granted, making maintenance nearly impossible. Item-level permissions also break inheritance, which is a SharePoint security best practice directly from Microsoft.

Complicating this factor is the fact that each document and item has a share button by default, encouraging people to share individual items. It is great for collaboration, but if you do not have a strict governance and security plan in place, it could put information into the wrong hands very quickly.

Beware of the new "Share" permissions in SharePoint and Office 365

The latest versions of SharePoint (SharePoint Server 2016 and Office 365 SharePoint Online) now have a new "Share" function that allows you to share any item in a list externally with anyone around the world.

Sounds great, right? You can easily take a document share a hyperlink with someone instead of downloading the document, saving it to your hard drive, and attaching it to an email. Now you don't have to worry about version control via intricate naming of attachments! The problem, though, goes back to security. By sharing an item in this way, it creates a new item-level permission for the individual receiving the content. Since we've already outlined how it's nearly impossible to track all item-level permissions, it creates all sorts of governance and security issues.

The good news is that this feature is generally turned off by default, but make sure you are following the technical operations and site/security administration portions of your governance plan to allow the right access to the right external partners. Based on our experience, we strongly recommend that you keep this feature off and educate your users instead on the other ways they can offer access to individual documents for viewing and collaboration.

Appoint a single administrator for each site collection

Creating sites and subsites in SharePoint is very simple and straightforward. Yet with this power comes great responsibility, so assign a single person to act as a central administrator of any given site collection

Add the administrator's details to the landing page of a site, so end users can easily contact that person to get help and advice. Consider using the "site users" web part to help with this, which can also be used to show the administrators through both SharePoint and Skype for Business (formerly known as Lync).

Encourage users to lock their phones or tablets

As users increasingly access and interact with business systems on the move, it's vital to mandate each of your employees implement a lock or passcode on their phones and tablets. The rise in Bring Your Own Device and Internet of Things makes this crucial to managing your business' security liabilities.

Most users lock their desktop or laptop at work, but doing it on a personal device is less common. Yet many smart devices are packed full of apps, which in turn contain a wealth of corporate data and settings. The newest versions of SharePoint strongly encourage mobile use cases, such as SharePoint Newsfeed, OneDrive for Business, and email clients. Leaving a mobile device unlocked opens a backdoor to your company's vital information – so ask your users to keep them locked!

Acing SharePoint Migration with Content Panda

Now, let's finish the story of the science and engineering firm at the beginning of our eBook, searching for a partner to help them deliver better training and support alternatives for future waves of users migrating from SharePoint 2010 to SharePoint 2013.

The firm implemented Content Panda for SharePoint, which accelerates user adoption, simplifies training and support, promotes governance, and centrally manages the user experience for companies using SharePoint 2010, SharePoint 2013, SharePoint 2016, and SharePoint Online.

Due to the fact that Content Panda doesn't require additional software installed on computers, the firm's IT team was able to quickly begin centrally managing the entire SharePoint training and adoption experience for end users – including content creation, permissions, branding, and audience targeting.

Content Panda enabled the firm to deliver in-depth training by world-renowned online SharePoint education leaders, 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 an unobtrusive button when navigating SharePoint to receive in-context help right when they needed it so they could answer their own questions and complete their tasks.

The firm slashed support tickets by 77 percent while alleviating the burden of authoring all help content. Content Panda is now instrumental to new users adopting SharePoint at the firm.

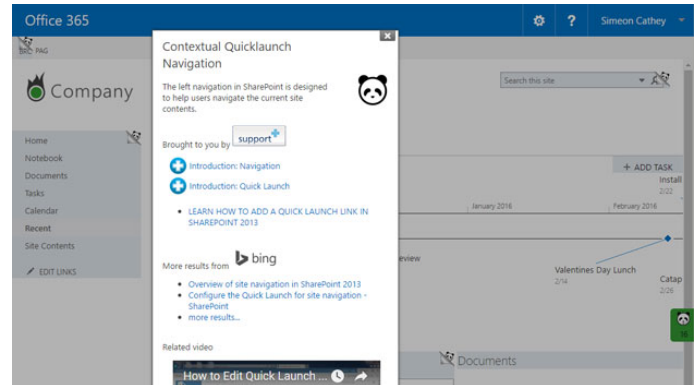## Content Panda for SharePoint

Content Panda is an online user experience platform for SharePoint. Content Panda has helped more than 500,000 people optimize business impact, monitor user performance and security, define and track usage patterns, and measure end-user interactions and navigation to fine-tune adoption of SharePoint.

A superior online user experience starts with great content, in-context. Accelerate user adoption; simplify training and support; promote governance; and centralize management inside SharePoint with Content Panda.

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 in order to gain access to:

- In-depth training created by Combined Knowledge, world leader in online SharePoint education
- Microsoft-approved help content
- Curated support articles

Employees can learn as much as they want, whenever they need to—without asking someone for help.
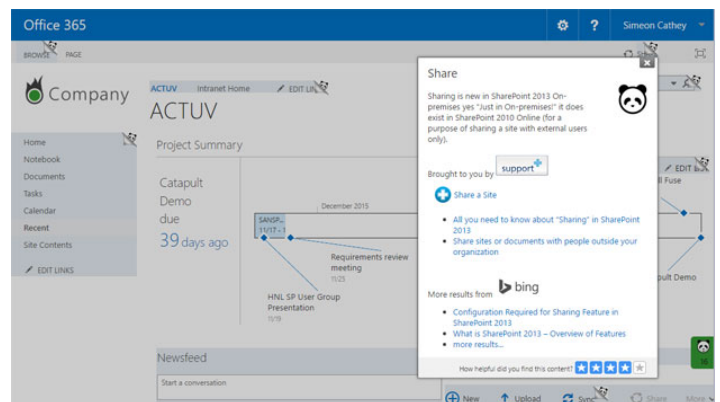
Context-sensitive, self-service support for end users means:

- Fewer help-desk tickets

- Better knowledge retention
- No workday interruptions for classroom training

Promote Governance & Business Policies

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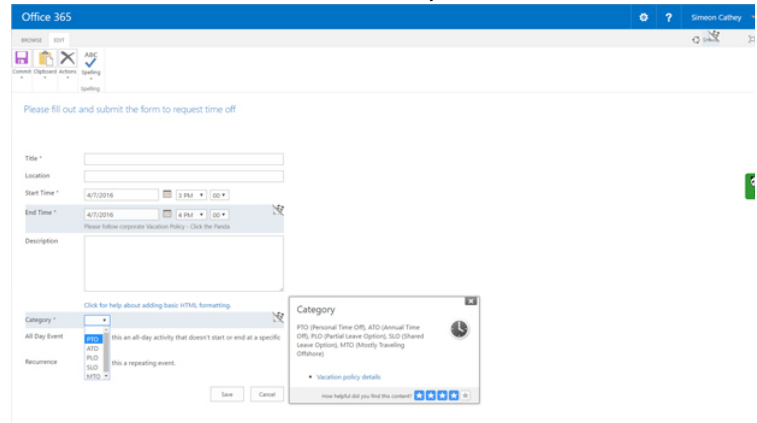
Embed useful information in complex forms, within project sites, HR portals and anywhere else you want to influence user behavior.

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.

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

Connect with us and learn how you can join the 500,000 satisfied individuals who have transformed their migration and usage experience with Content Panda for SharePoint. Our 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.

Thank you for your interest in Content Panda for SharePoint.