



A Practical Framework for SharePoint Metrics

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Contents

1	Background	3
1.1	Introduction	3
2	Why Measure?	4
2.1	Objectives.....	4
2.2	Perspectives	5
3	Measurement Process	5
3.1	What are the business objectives?	6
3.1.1	Get SMART	7
3.1.2	How do you spell success?.....	7
3.2	How should the solution be designed to meet these objectives?.....	7
3.3	Who are the metrics stakeholders?.....	8
3.4	What are the metrics and how should we present them?	9
3.4.1	Types of Measurement	11
3.4.2	Telling the Measurement Story	19
3.5	How can we collect the metrics?	25
3.5.1	Usability Testing.....	25
3.5.2	User Feedback.....	26
3.5.3	User Surveys.....	26
3.6	What do the metrics tell us about how we should change?	27
4	Next Steps	27
5	Appendix A: Examples of Intranet Measures.....	29
6	Appendix B: Resources and References.....	30

1 Background

Many organizations see measurement and calculating a return on investment (ROI) as a mechanism to justify a project. However, measurement should be more than that. It should provide a process to ensure that you get the most value out of each project and initiative. This is especially true of SharePoint projects, where an effective measurement process will provide the necessary feedback about where you are going along the road to successfully leveraging your investment. At every stage in the journey, measurement (the process) and metrics (the indicators) provide a valuable means for focusing attention on business outcomes – not just ROI alone, but specific, meaningful business results described in a way that clearly demonstrates value.

The purpose of this paper is to describe a practical approach for measuring the value of the solutions we build with SharePoint. Unlike investments in other business solutions like those to support general ledger or accounts payable, investments in SharePoint solutions often address more difficult to measure organizational goals for outcomes such as knowledge management (KM) and collaboration. Since you often can't mandate the use of these types of solutions, it's even harder to demonstrate value.

It's relatively easy to find sources of advice for how to build a *technically* successful SharePoint solution. There are dozens of excellent SharePoint conferences¹ and multiple dozens of books that describe how to optimally configure SharePoint solutions. Virtually all of the advice available helps a team that already has a budget for delivering a SharePoint project build a functioning solution. Of course, there's not much point in doing metrics for a solution that doesn't function – so these books and conferences are a great way to get started. This paper, however, is designed to help teams understand how to get better *value* from SharePoint investments.

In 2001, the United States Department of the Navy CIO created an initiative to measure the value of investments the Navy was making knowledge management. I led the development of that approach. The concepts in this paper are based on that approach, updated to include additional learning and adapted specifically for SharePoint. A copy of the original Navy white paper is available at www.susanhanley.com – [KM Metrics Guide](#).

This paper is primarily intended for a business audience, which could include the business owner of an entire SharePoint deployment in an organization or the business owner of a single site or solution.

1.1 Introduction

The only true sustainable measure of value for a SharePoint solution is business impact - how the solution helps to grow revenue, increase profit, “advance the mission,” satisfy customers, or improve business operations. Too often, organizations view “adoption” as the key measure of SharePoint success. Unless a solution is adopted, it cannot possibly deliver value. However, adoption alone is a necessary but not sufficient measure of success.

¹ A quick Google query for SharePoint conferences will quickly get you links to some of the key SharePoint conferences, which include the free SharePoint Saturdays that are held in cities all around the world as well as the conferences produced by Microsoft such as the [Microsoft SharePoint Conference in October 2011](#).

According to Mark Gilbert, Research VP at Gartner Group, some 25% of SharePoint solutions are failing or the sponsors are not satisfied². One consistent trait of failed or failing deployments is not enough end user adoption but another equally important trait is an unclear connection to business goals. Sustained adoption depends on a clear connection to business value so while adoption is a possible indicator, it does not tell the whole measurement story. A good SharePoint solution includes a plan for demonstrating business value - a practical measurement plan that recognizes the key solution stakeholders and tells the success story in a way that clearly demonstrates business impact. The goal of this paper is to help you identify and document these success stories.

2 Why Measure?

Measurement is critical to being able to determine the level of success of your solution. As a foundation, you should focus on both the objectives for measurement and the various perspectives for your metrics.

2.1 Objectives

Performance measures support decision-making and communication throughout an organization to understand the progress, efficiency, value, and strategic alignment of SharePoint solutions.

Performance measures for SharePoint solutions have several objectives during different parts of the solution life-cycle:

- Before you get started, performance measures:
 - Help make a business case for implementation – to quantify the “before” and estimate the “after” situation
- During the solution development, performance measures:
 - Provide a target or goal for each phase of a deployment
 - Help make "investment" tradeoffs – to decide which of several proposed projects has the greatest organizational impact
 - Help guide and tune the implementation process by providing feedback to users or sponsors to encourage desired behaviors or modifications to the solution
- After the initial deployment, performance measures:
 - Describe, retrospectively, the value of the initial investment decision and the lessons learned
 - Help develop benchmarks for future comparisons and for others to use
 - Focus earning from the effort and developing lessons learned.

Having a measurement program or an approach for metrics is important not just to understand the business case for your investment, but to understand the trade-offs or impact of selecting investment A over investment B and to help guide your deployment after your solution is operational. It's not just about "show me the money," it's also about "how can we achieve an even greater impact?"

² Gilbert, Mark. (April 5, 2011). Making SharePoint Deliver [webinar]. www.gartner.com.

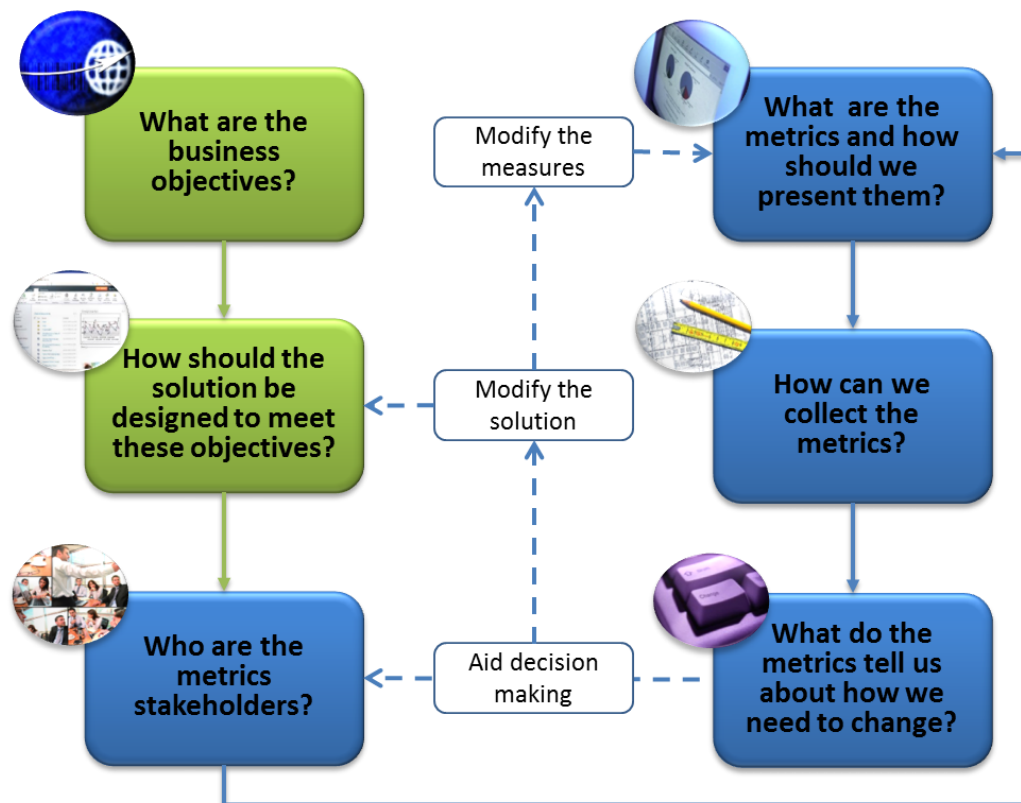
2.2 Perspectives

The perspectives of the customer, department, organization, and individual in an enterprise are critical to its success. The implication of this for SharePoint metrics is important – when you think about metrics and the measurement process, it is important to identify who is likely to use the performance measurement information. Potential users include strategic decision makers, project decision makers, funding and approval stakeholders, government agencies involved in approval or regulation, end users, or customers. Metrics should be in terms that are familiar to the stakeholder. For this reason, you may find that there are several different metrics that need to be captured for your initiative. There is no one “right” set of metrics for SharePoint initiatives. Most initiatives will require a combination of measurement types and classes to effectively communicate with the key stakeholders.

3 Measurement Process

The measurement process is presented as a series of questions that help guide you through the decisions required to define, choose, and use the metrics. The key questions are shown in the exhibit below.

The first two questions are actually outside the scope of the measurement process, but because they provide a critical foundation for the approach, the process is not really complete without them. The remainder of this paper discusses each question and provides examples of how they might be answered for your organization.



The remainder of this section reviews each of the key questions shown in the diagram and provides recommendations for how you can answer these key questions for your SharePoint solution.

3.1 What are the business objectives?

Designing any good IT solution requires a comprehensive understanding of the business problem you are trying to solve. This is especially true if you are implementing the social computing features of SharePoint. There is only one reason for implementing SharePoint or any other collaboration or portal platform: You have a business problem to solve.

If you don't have an important or valuable business problem that your SharePoint solution addresses, then you need to go back to the beginning to find that problem. Be sure that you are tying your SharePoint solution to a key organizational initiative or goal. If not, you are working on a "side show" project - one whose funding is going to be at risk no matter what your measurement program says. (This could also become a career-limiting move if you are the one responsible for the initiative.)

Another reason to have a clear connection to business goals is to help make decisions about which potential SharePoint project to implement. With limited time, budget, and resources, most organizations find that there are more possible projects for the SharePoint team than can possibly be accomplished. In this scenario, it's important to have a framework for differentiating among opportunities that are competing for scarce resources.

In 2009, strategy consulting firm McKinsey conducted a survey to identify how companies are benefiting from Web 2.0 solutions³ (which include SharePoint). Close to 70% of the respondents reported that their companies have gained measurable business results, including:

- More innovative products and services
- More effective marketing
- Better access to knowledge
- Lower cost of doing business – reduction in travel and other operational costs
- Higher revenues
- Improved employee, customer, and partner satisfaction.

While it's easy to say "Yes, I want that too," it's important that you understand what these objectives mean for *your* business and how you specifically plan to measure *your* solution results. It's really difficult (if not impossible) to plan your measurement strategy around these broad goals. Of course we all want to achieve these strategic objectives in general, but to produce meaningful and measureable results, you need to identify a tactical approach that works in your organization. So, the best approach is one where you get SMARTer about your solution goals.

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http://www.mckinseyquarterly.com/How_companies_are_benefiting_from_Web_2_0_McKinsey_Global_Survey_R esults_2432

3.1.1 Get SMART

A very well-known method for setting meaningful and realistic objectives for your SharePoint solution is the SMART approach, which refers to an acronym that describes the key characteristics of meaningful objectives which are:

- **Specific** (concrete and well-defined)
- **Measurable** (quantifiable, comparable)
- **Achievable** (feasible, actionable)
- **Realistic** (consider resources)
- **Time-bound** (deadline driven)

A good objective is expressed in a SMART way. For example, a good collaboration solution can speed the time to create critical deliverables. For a consulting organization, a SMART objective for a SharePoint proposal library solution might be to reduce the average amount of time it takes to produce complex proposals by 10% in Year X. When you start with a SMART business objective, you immediately have two critical elements of your measurement plan: a baseline measure to capture and the outcome that defines success.

3.1.2 How do you spell success?

The good news is that most important business problems in your organization will already have at least one baseline measure - but this is not always the case. Before you even think about getting started, try to quantify both the problem and the target - and get management buy-in regarding the change in outcome that means success. In other words, understand how success is spelled in your organization.

In addition, take a look around the organization to find examples of solutions that are already delivering value – solutions that users really liked and that management holds up as examples of successes. If you can understand why those projects or solutions are considered successful, you can look for analogous problems or opportunities to find what might work in your own backyard.

3.2 How should the solution be designed to meet these objectives?

The next step in the measurement process is also beyond the scope of this paper - but it is a critical factor in the success of your SharePoint solution. It's not enough to just understand the business objective; it's also critical to design a solution worth measuring!

In the context of SharePoint, this means considering the following, among others:

- What is the most appropriate site architecture and technical infrastructure for your solution?
- Which features of SharePoint make sense to achieve your objectives?
- What types of customizations make sense for your solution?
- What is the plan for security?
- What is the governance model for your solution?
- Do you have a clear set of roles and responsibilities for deploying the solution?

- What types of training and communications are planned⁴?

3.3 Who are the metrics stakeholders?

Part of understanding the business objective is identifying your key stakeholders. From the perspective of metrics, you need to identify who will use the measures, how your solution addresses the business problems they care about and which solution metrics most effectively demonstrate an impact on those problems.

In most cases, your solution stakeholders and your metrics stakeholders are the same people. However, not all stakeholders need the same type of information and you may have a metrics stakeholder who only has a peripheral relationship to the solution itself - like a high-level business executive. A helpful approach is to create a list of solution stakeholders and use brainstorming to identify additional stakeholders who care about specific metrics. Use that list to create a table to identify the type of information each stakeholder needs to know about your solution.

The type of information each stakeholder will care about depends on the types of decisions that they need to make. Identify the key decisions and questions for each of your key stakeholders.

- How is their business unit evaluated?
- What keeps them up at night?
- What are the metrics that they use or review already to evaluate the success of business initiatives?
- What information do they need to derive from your metrics in order to make better decisions or understand their business operations?

Remember that whatever metric you use the metric needs to be presented in terms that will resonate with the audience.

Sometimes, stakeholders get carried away with the level of detail and measures they think they need to measure the success of your initiative. As you work with your stakeholders to determine what they need to know, **focus on the outcomes and then work backwards to figure out how you will measure that outcome**. For example, I worked in a consulting firm where we had a core business objective related to understanding employee expertise so that we could both staff projects with the best possible resources and quickly respond to client questions. One of our initiatives included maintaining expertise information about our employees. While we could create reports to show the percentage of employees who had entered at least one expertise topic at the "expert" level (and to be sure, my boss wanted to know that number), that metric was pretty useless in terms of telling executives the value of the data itself or the processes we'd created to maintain it. In this example, high "adoption" told virtually nothing about the value of the information or the processes we'd enabled to keep it up-to-date. We realized that the only true and useful measure of the value of the expertise identification information was how it was

⁴ For more information on effectively planning SharePoint 2010 solutions, refer to [Essential SharePoint 2010: Overview, Governance, and Planning](#) by Scott Jamison, Susan Hanley, and Mauro Cardarelli. I think we do a great job providing specific and practical recommendations about these key topics (and others).

used. To capture the value of the information, we conducted an annual survey where we offered prizes for people who could tell us the best story about how the expertise information delivered value to their business unit or project or client. We asked the storyteller to quantify the value - typically in terms of time saved or revenue generated - and then we applied a consistent, fully loaded average salary cost to estimate the monetary value of the story.

3.4 What are the metrics and how should we present them?

Once you understand your key stakeholders and what they need to know, you need to focus on identifying the *types* of metrics, how you will *collect* the metrics, and how you will *communicate* the metrics. Together, these three elements will form the measurement approach.

How you communicate about metrics will likely depend on where you are in the life-cycle of your project. For example, if you are making a new investment in SharePoint as a *platform*, you will undoubtedly need to do some type of formal Return on Investment (ROI) analysis but your estimates for benefits are likely to be more general than specific - and pretty high-level. In December 2009, Microsoft commissioned Forrester Consulting to examine the total economic impact and potential return on investment (ROI) that enterprises may realize by deploying Microsoft SharePoint Server 2010. Forrester conducted in-depth interviews with 11 Microsoft customers that had started using the product as early adopters and compiled their results into a composite case study of a 5,000-worker professional services company. The analysis and approach is available at:

http://download.microsoft.com/documents/uk/enterprise/75_The_Total_Economic_ImpactTM_Of_Microsoft_SharePoint_Server.pdf.

The approach is pretty much a traditional ROI cost-benefit analysis model and will be useful to many organizations considering moving to SharePoint 2010 as a platform. The approach is less helpful for analyzing among alternative SharePoint investments or measuring impact of an ongoing solution, but is well worth reviewing as part of an overall measurement strategy.

Once the SharePoint infrastructure is in place, the incremental cost of each new investment is relatively trivial so if you choose a traditional ROI measure for your solution, you will need to determine if and how you need to account for infrastructure costs. The best advice here is to choose an approach and be consistent. It can be very challenging to estimate how much data storage one solution will need over another and very difficult to determine a consistent method for estimating storage in advance. So, if you decide to leave storage infrastructure or ongoing operational costs of maintaining the SharePoint environment out of the measurement equation, leave it out for all of your prospective or existing solutions. From a practical perspective, it's impossible to imagine an ROI calculation that is 100% precise - and that really shouldn't be your goal. Your measurement goal is to ensure that you have a consistent approach to ensure that value is being delivered with each solution or incremental investment.

ROI is really only part of the measurement story for SharePoint - and it won't be the right metric for all of your stakeholders. While employees using a collaboration solution might appreciate the benefit the organization gets from the platform, it's not the measurement that they really care about. The metric that drives their day-to-day behavior is not the overall benefit for the company; it's a more "personal" metric that answers the question: *what's in it for me?*

The most important characteristic to consider when choosing or defining a performance measure is whether the metric tells something about the outcome you are trying to achieve. Choose the metrics you want to capture in terms of the use cases that are of highest interest to your stakeholders and their business objectives. It's also important to pick a small number of metrics that are both relevant to the business and have a

more direct relationship to business outcomes – and can be collected at a relatively low cost. For example, a possible metric for a Best Practices library is the number of times the library has been accessed. A large number of accesses or "hits" for the library or individual document suggests that people are reading documents, but this does not definitively indicate whether the content was useful to anyone or whether it improved operational efficiency or quality. To get a better measure of value, you could enable the ratings function in SharePoint 2010 along with very clear directions regarding the context of the ratings (in this context, a good rating metric would be to ask users to rate the degree to which they were able to re-use the document). Adding ratings makes the hits or downloads metric much more valuable than either would be on its own because it combines a quantitative measure of usage with a qualitative measure of value. Adding a user survey to seek out specific cases where the information helped and how it was used would add even more meaning to your metric – because you would now have specific examples that your stakeholders can relate to (and share with others).

The remainder of this section discusses more about the types of measures you may choose to collect and alternative approaches for putting the outcome metrics together to communicate results. This discussion is followed by a review of approaches for collecting your metrics.

One organization I know employs an "ROI-like" measurement approach to prioritize and evaluate potential SharePoint projects – but the ROI that they calculate does include cost measures for routine projects. Many of these projects involve using SharePoint to automate an existing process or workflow. They have a small team of internal resources to help with the creation of SharePoint solutions. To determine which projects to work on, they calculate a baseline metric for executing the process before SharePoint – sometimes by measuring process throughput and other times by observing the time it takes to do a task. They then estimate the process or throughput times expected in the "after" situation and multiply this number by the number of times the process is executed in a year and then by an average fully loaded hourly cost for an employee. The initial calculation helps prioritize which projects to work on. Then, to ensure that the solutions are delivering the expected value, they go back to each project after about 90 days and measure actual results. These new metrics help provide insight into potential repeatable solutions for other business areas. While the metrics are not precise measures of ROI because no costs are analyzed, since the same approach is used for all projects, the result provides a repeatable calculation that can be used to establish priorities and disseminate best practices, which are important elements of an overall measurement program.

3.4.1 Types of Measurement

The specific measurement approaches you choose for your SharePoint initiative can be *quantitative* or *qualitative* and, in general, a measurement program should include both types. Quantitative measurement approaches use numbers and typically provide "hard" data to evaluate performance between points (such as last month to this month) or to spot trends. For example, you can collect quantitative data on site usage or the number of hours spent on a particular task. Even if the absolute value of hard data such as the number of site accesses in a given month don't tell you much about the value of the solution, a significant drop or increase in that metric can give you important clues about the content or the solution itself. Some quantitative measurements can be obtained automatically from native SharePoint usage data and others require third-party tools. Qualitative measurement approaches, often referred to as "soft" data, include stories, anecdotes, and future scenarios. When it is difficult to capture meaningful quantitative metrics (for example, at the beginning of a project), qualitative metrics can have a significant benefit. The best measurement programs I've seen incorporate both quantitative and qualitative measurement. The qualitative metrics - especially those with a quantitative "punch line" - add richness to your quantitative metrics.

Measurement Example 1: **Expertise Location – Who Knows What?**

- Objective: Implement a pilot expertise location solution to see whether or not it would add value to the organization. We planned a 90-day pilot with a small group of participants, each of whom agreed to both create an expertise profile and query the solution at least weekly in the course of their work.
- Metrics Approach: Balanced Scorecard to showcase quantitative and qualitative metrics
 - Number of queries
 - Number of profiles created
 - Surveys and interviews to capture specific anecdotal evidence about the value of the tool. We only captured anecdotes where the participant could describe both the problem and the value of the answer they received by using the tool to find expertise. The user-described "punch lines" became the benefit estimate for the ROI analysis we calculated at the end of the pilot.
- Results: Funding for full deployment
 - It wasn't just the ROI number that impressed the decision makers and resulted in a decision to implement the solution beyond the pilot - it was the anecdotes themselves, which provided "color commentary" about the numbers - and re-usable stories that the executives could tell to encourage user adoption of the solution and answer the "what's in it for me?" question for their employees.

Measurement Example 2: **Intranet Content Management**

- Objective: Demonstrate the ongoing value of maintaining high value content on the intranet. While we all know that it's important to have a plan for content management for any successful intranet portal, keeping content current takes time - and both users and managers need to be re-assured that the investment in keeping content current has meaningful value to the organizational objectives.
- Initial Metrics Approach: Quantitative Measures Report Card
 - Number of assets added per month
 - Number of pages updated
 - Number of assets downloaded.
- Supplemental Metrics Approach: “Value Stories” Contest
 - The numbers showed relatively consistent usage from year to year, which showed adoption but didn’t really tell much about the value of the investment in maintaining content.
 - To supplement the numbers, we collected “value” stories with a contest and in order to get credit, the storyteller needed to provide a perceived measure of value.
 - Each year, the stories had a similar theme:
 - Skills: Many stories talked about the value of finding a person with a skill that they didn't know existed in the company. In one story, the "punch line" was: "If we hadn't been able to quickly identify someone with the right skills, we would have given up a half-million dollar task from the client out of fear we could not do it."
 - Re-usable Assets: Other stories talked about the value of finding documents that could be re-used: "It's impossible to estimate how many hours the re-use of the presentations, example documents, and approaches saved our team. Because the [intranet content] provided overviews and specific examples, our team was able to get started immediately in the organization and execution of our project."

3.4.1.1 *Qualitative Metrics*

As the previous examples demonstrate, qualitative metrics provide context and meaning for quantitative metrics. When it is difficult to capture meaningful quantitative metrics, (such as the value to the individual for being a member of a community), qualitative metrics (such as a story from a member about how the community helped him solve a critical problem) can have as much or more impact on stakeholders. Qualitative metrics can augment quantitative metrics with additional context and meaning.

The best qualitative metrics are what I like to call “serious anecdotes.” A “serious anecdote” is a story with a meaningful punch line – i.e. a story that describes a measurable business result. For example, the following “serious anecdote” describes a process and result that occurred often in the consulting firm where I worked. Even though this anecdote described just one specific instance, all of our stakeholders could relate to the story it describes. Moreover, since we collected and quantified many similar “serious” anecdotes as part of our measurement program, the *combination* of the “serious” outcomes of our qualitative stories demonstrated a real and significant number to attach to our solution investment.

Example of a “Serious Anecdote” - Consulting

I joined the organization on March 16 without previous experience. After one week of training, I joined a project team.

After one day of training on the project, I was assigned a task to learn a particular technology that was new to everyone on the team. I was given a bunch of books and told that I had three days to learn how to create a project using this technology.

In my first week of training, I remembered learning about the company’s expertise database. I sent an email to four people I found in the database asking for their help. One of them sent me a document containing exactly what I wanted.

Instead of three days, my task was completed in one-half a day.

Example of a “Serious Anecdote” – Pharmaceutical

A scientist with expertise in thrombotic and joint diseases in Frankfurt began a project to isolate and culture macrophages and needed some help.

Meanwhile, two scientists in the U.S. had deep experience with protocols for this area.

The Frankfurt scientist consulted the intranet to find expertise within the company and contacted the two U.S. scientists.

Both scientists in the U.S. quickly responded with assistance. One helped with culturing protocols and the other helped with information about magnetic cell sorting.

By reaching out to the other scientists via the online search, the Frankfurt scientist was able to leverage existing internal expertise and in the process, **reduced his research effort by four weeks.**

Example of a “Serious Anecdote” – Construction

ICA is a construction company in Mexico with operations in the Americas and Europe. They created an enterprise content management system using Microsoft SharePoint Server 2010. It provides a way to organize and search terabytes of documents and create knowledge communities.

“Because ICA stores and organizes project documentation in one place, it can better track customer change orders throughout project life cycles, which can **add up to tens of thousands of dollars worth of work.**”

Prior to the implementation of the SharePoint solution, it was difficult to charge customers for changes because they were not well documented. According to the Web Infrastructure Manager, “Now, we can track and document every task completed so that we can bill for it.”

Source: <http://www.microsoft.com/casestudies/Microsoft-Sharepoint-Server-2010/ICA/Construction-Firm-Speeds-Project-Completion-with-Centralized-Content-Management/4000010862>

Even if you have a rich collection of quantitative metrics, you will want to have some qualitative metrics to help provide context and meaning to your measurement program. The collection of anecdotes or stories is probably the most common type of qualitative measurement approach. But what if you haven't yet implemented your solution and you don't yet have any stories to capture? In this case, there is a special type of storytelling that is particularly helpful. These types of stories describes a future vision for the organization or business unit or describe a "day in the life" of one or more types of employees and are often referred to as "future scenarios." A future scenario might start like this: “Imagine the future...” The example below is an excerpt of future scenario for a “next generation” intranet at a management consulting firm.

Example of a Future Scenario – Management Consultancy

Imagine the future ... On December 15, 2012, just after his morning coffee, Rick Jones, a consultant working with a financial institution, is asked by the client for advice on creating a social media strategy.

Rick has limited social media experience and the client wants a proposal with a fairly detailed plan before the holidays so that the budget money can be allocated prior to the end of the year.

Over his next cup of coffee, Rick accesses the Intranet and searches the topic “social media strategy.” A graphic view of a knowledge map helps him navigate the abundance of information.

Rick finds the firm’s social media strategy methodology, several sample proposals for similar clients that have 3-star ratings by the Social Computing Community of Practice, 25 applicable quals, a list of the members of the Social Computing Community of Practice and links to their personal profile pages.

Rick clicks on a 3-minute embedded video that features Social Media expert Liz Picone talking about the key challenges for “social business” engagements.

Rick sees that the quals in the business area of the financial institution he’s working with are limited, so he executes a search outside the intranet, using research services to which the company subscribes and web sites “certified” by the corporate library.

After lunch, Rick sees that several of the social media experts are online and he calls a few to ask their advice on how to address a particularly unique aspect of the potential engagement.

Rick downloads one of the proposals recommended by an expert for a head start. As he begins adding details that are unique to his client’s needs, the search agent built in to the Intranet pops up with three additional proposals that are also similar to Rick’s and an article in a Gartner research database that rates his company as a premier provider of social media consulting services.

On December 18, the proposal is completed and mailed to the client.

When the proposal is completed, Rick clicks the option “save to Intranet” so that his newly completed proposal is immediately available to others across the firm.

Rick is prompted for some simple meta-data so that his proposal can be indexed and catalogued appropriately.

In three weeks, the system prompts Rick for a status update on the proposal - Did we win? What was the feedback from the client? Rick updates the proposal database simply by replying to the automatically generated e-mail message.

This example “future scenario” concluded with a summary of the vision for knowledge management at the company. Did it work? Draw your own conclusion. In the meeting where this vision was presented, one of the executives in the room raised his hand and said, “I can’t *wait* to work for that company!”

SharePoint 2010 provides yet another particularly interesting way to capture qualitative metrics with the Ratings feature. Consider using ratings for a very simple purpose: to ask users to indicate whether a page or document is helpful. In other words, the messaging for your ratings program is both simple and clear - all you are asking users to rate is "was this asset helpful?" or "were you able to get value from this asset?" This simple approach gives you a way to quantify your qualitative metrics in a meaningful way and it also gives you a way to capture more meaningful stories. For example, you could trigger a survey when a user rates an asset with 5 stars. In the survey, you could ask the user for more details about how they re-used or got value from the asset and then you can follow up the survey response with a conversation. People will typically tell you more in a conversation than they will write down so if you use a "journalist approach" to find the lead and then interview the storyteller, you will probably get much better results.

3.4.1.2 Quantitative Metrics

Too often, SharePoint solution owners spend too much time capturing metrics that have very little impact on the true value of the SharePoint solution. Every metric you capture, whether it's a *system metric* that is automatically provided or a *business metric* that might require some additional effort to record, needs to fit in to the story you are trying to tell.

System Metrics

System metrics (often called "usage analytics") are captured directly from SharePoint or a third-party tool. System metrics alone do not directly measure business value, but they can be especially useful in providing clues to where users are getting value and to help quickly spot content problems or gaps and areas for improvement. System metrics don't typically cost very much to collect but they are more loosely coupled with the outcome you are trying to measure so you will almost always need to make a decision about how much and which "non-system" metrics you need to add to your system metrics to create a meaningful measurement approach.

The following metrics are available "out of the box" with SharePoint 2010:

Metric	Objective
Number of Unique Users (month to month)	<ul style="list-style-type: none">• Provides a proxy for adoption, which is a loose proxy for value.• Initially, you want to see the number of unique users go up each month after launch.• Once the solution is in a steady-state mode, you can look to this number to calculate the percentage of employees who use the solution.
Most Viewed Pages/Sites	<ul style="list-style-type: none">• Provides a proxy for the most valuable content.• Sites not being used help identify content that might either need to be promoted or deleted.

Metric	Objective
Top Queries (search)	<ul style="list-style-type: none"> • Identifies "trending" content. • Searches with good results are a value and user adoption metric for the portal - because they indicate that the portal is delivering content users need. • Top queries can also provide insights about what content should be promoted to the home page.
Failed Queries / No Results Queries	<ul style="list-style-type: none"> • Identifies candidates for best bets or synonyms and identifies emerging business terms or concepts.
Best Bet Suggestion Report	<ul style="list-style-type: none"> • Helps the business owner improve user outcomes by identifying URLs as most likely results for search queries.
Best Bet Usage	<ul style="list-style-type: none"> • Helps identify which best bets are adding value and as an input to determine new best bets or best bets that need updating.
Storage Usage	<ul style="list-style-type: none"> • Provides a way to monitor capacity to ensure that there are no potential impacts on system performance, which might affect adoption, user satisfaction, and other metrics.

With third-party tools (such as those available from [Nintex](#) and other vendors), some additional system metrics can be captured:

Metric	Objective
Most Viewed Documents	<ul style="list-style-type: none"> • Provides a proxy for the most valuable content.
Document Contribution/Editing Analysis	<ul style="list-style-type: none"> • Provides a way to measure sustained adoption from the perspective of employee engagement.
Team Site Summary Information <ul style="list-style-type: none"> • Total Number of Team Sites • Viewed in Past 30 days • Modified in Past 30 days • Sites with no access in past 12 months • Trend of the number of team sites created 	<ul style="list-style-type: none"> • Provides a way to understand which sites are actively being used to monitor the health of the collaborative team sites. • Can be used to identify which sites are no longer being used and might be able to be deleted or archived. • Provides a proxy for whether or not team sites are adding value.
My Site Summary and Trends <ul style="list-style-type: none"> • Total number of My Sites • Viewed in past 30 days • Modified in past 30 days • Average size 	<ul style="list-style-type: none"> • Identifies adoption of people-to-people collaboration features. • Proxy for employee engagement.

Metric	Objective
Content Database Growth	<ul style="list-style-type: none"> • Provides a way to spot trends in database growth over time. • Provides a proxy for engagement.
CPU Usage and Memory Usage	<ul style="list-style-type: none"> • Provides a way to monitor peak performance times to plan capacity over time and by time of day. • Helps connect solution usage to key business events.

Business Metrics

Business or outcome metrics are used to tell the story of how the solution impacts the organizational business processes. It is very likely that your organization is already tracking a significant number of business metrics related to the core business activities you perform. These may include metrics such as the number of new customers acquired over a given period, metrics related to order processing, or metrics related to financial accounting such as average accounts receivable. In the ideal world, you should look to your SharePoint deployment to have an impact on these key business metrics - because if your solution is solving a core business problem, you clearly want to make sure you can directly impact "the main event." But it's almost impossible to measure SharePoint's *unique* impact on these metrics. If your story can be shown alongside positive movement in key corporate metrics or if your solution is really directly related to one or more of these metrics, you need to track and showcase them in your metrics reports or dashboards. You may not always be able to directly impact the "main event," but you really want the problem you are addressing to be at least part of or connected to the bigger picture. Here are a few examples of business metrics that might help you get started:

- **Number of hours per week to process data or execute a business process:** Let's say that your business objective is to reduce the amount of time it takes to execute a specific task. You've designed a data capture and workflow solution in SharePoint to improve the processing flow. The first thing you need to do is get a baseline measure for the current process - the "as is." There are a number of techniques that you can use, ranging from asking the people who are doing the job today to timing them either informally or with a time and motion study. What if your process is like the one I described in the previous section - finding experts to work on an assignment or answer a question? In this scenario, you will have to be creative about identifying your baseline metric. As discussed in the next section, you may have to find a qualitative metric to serve as your baseline that you capture by collecting stories or anecdotes to demonstrate the current problem. You may need to try to quantify the current problem through the use of stories, anecdotes, interviews, surveys, and other qualitative measures. As long as you apply consistent assumptions in your baseline and post-project metrics, you should be in a good position to demonstrate a positive impact. For example, in the expertise location scenario I described earlier, we made an assumption at the beginning of the project: that the expertise search "problem" occurred a specific number of times per day across the company. We used

that same assumption when we measured the "results" 90 days after the launch and annually after that.

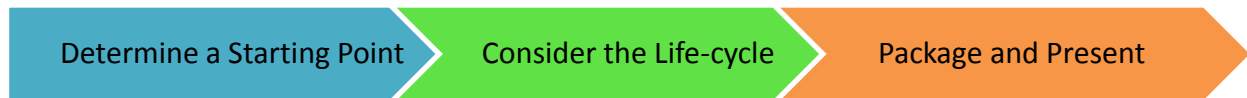
- **Number of [proposals/contracts, etc.] produced per month/quarter/year:** If the objective for your collaboration solution or repository is to improve the ability to create new proposals, contracts, or other documents that rely on re-usable content, one useful outcome metric is the number of these artifacts that you produce in a given time period. For proposals, you might want to track both the number produced and the number of *successful* proposals.
- **Number of "[Your Organization] All" emails:** Reading email messages that aren't really targeted to you takes time - time that could be spent focused on your critical tasks. In addition, un-targeted emails have a cost to the organization in terms of mailbox storage. Transferring even a small portion of the "All" emails to targeted SharePoint news or announcements can have a direct positive impact on productivity and email cost.⁵ Calculating a baseline number for "[Your Organization] All" emails is a good productivity-related metric.
- **Number of email attachments:** Email attachments have a significant cost in terms of both productivity (users may never know if they are looking at the most recent version of a document) and storage.
- **Average application training costs:** One benefit that many organizations find from investing in portals is the ability to significantly reduce the amount of money they spend on application training. The reason is that many users of enterprise applications only use a small fraction of the functionality and by creating web parts for the most common functions, you may be able to eliminate application training for these users.
- **Cost savings to retire a legacy application:** Many organizations are slowly retiring their legacy applications are re-building the solutions on the SharePoint platform. For a baseline metric, look to the annual hardware and software maintenance costs for your legacy solutions.

If you want to translate the time it takes to execute a current business process to dollars, you'll need to get an average fully loaded hourly cost for an employee. You can probably get this number from your HR or Finance department.

3.4.2 Telling the Measurement Story

Communicating the measurement story is as important as picking the measures in the first place. Telling the measurement story for your SharePoint solution is no different from telling any other type of business story - you need to understand your audience, what they need to know, and their preferred platform for evaluating metrics. And, even more importantly than for other business stories, you need to consider carefully where you are in the life-cycle of your investment - because the story you tell and the measures you use will be different at each phase.

⁵ If you are looking for a great way to estimate the cost of the "info-glut" related to email, take a look at [The Hamster Revolution](#) by Mike Song, Vicki Halsey, and Tim Burress (Berrett-Koehler Publishers, Inc., 2007). They estimate that if you send and receive as few as 60 emails per work day and spend on average 2 minutes per email, that you are spending a total of 60 days per year just on email! If you multiply that by the number of people in the organization, you can see that you wouldn't have to impact too many messages in order to make a significant impact on productivity. (If you combine the impact of using SharePoint to publish information and some of the other great suggestions in this book, you could make an even bigger impact.)



3.4.2.1 Determine a Starting Point

If you've selected a key business problem to automate using SharePoint, then it's likely that you already have some baseline measures in place. Note that one major mistake people often make in documenting their measures of success with SharePoint is that they try to demonstrate business impact without knowing where they started. This approach is doomed to failure. **You need to have a good baseline or you will have no ability to measure the impact of your SharePoint solution.** The first place to look for outcome measures are the metrics that you are already capturing for the business problem that you are trying to solve. If those metrics do not already exist, you will want to establish a good baseline measure before you get started. You can't tell how far you've come if you don't know where you started!

With that in mind, you will most likely want to capture both quantitative measures and qualitative metrics for your baseline "before." After you have deployed your solution, and sometimes as you are implementing along the way, you will want to use the same approach to capture your "after" story.

3.4.2.2 Consider the Life-cycle

In 2001, the [APQC](#) published the results of a benchmarking study on *Measurement for Knowledge Management* that showcased the importance of looking at different metrics at different stages in the maturity of a KM project. While this concept is probably not unique to KM projects, gathering meaningful metrics for portal, collaboration, and other types of KM projects has always been, to some extent, like a quest for the Holy Grail. This is even more complicated when you are starting a new project or seeking funding for a new SharePoint initiative because the ability to tell your story is going to be based on estimates for a work process or behavior change that hasn't happened yet. Use the table below, which reflects a "SharePoint" perspective on the concepts initially described by the APQC, to identify how you can adapt your metrics story to the life-cycle of your initiative.

Life-cycle Stage	Recommended Types of Metrics: Quantitative	Recommended Types of Metrics: Qualitative	Sources
Planning	<ul style="list-style-type: none"> • Time to perform current process • Number of proposals/contracts/new products, etc. per month • Number of "All" emails • Other business metrics related to the problem you are trying to solve. Choose as many metrics as you can easily capture cost-effectively as long as they are related to the business problem. • Remember that a "SMART" objective has both a metric and a target so in addition to identifying what you are going to measure, you also need to identify a goal or target for that metric. For example, if your metric is the number of "All" emails, then your target might be to reduce the number by a specific percentage. If you are planning a pilot, your target for the end of the pilot phase might be less aggressive than your longer term goal. That's fine, but make sure that the definition of pilot success is reviewed with your key decision makers prior to the start. 	<ul style="list-style-type: none"> • Anecdotes describing challenge/failure/negative consequences of current processes • Future scenarios • "Day in the life" stories 	<ul style="list-style-type: none"> • Current system metrics (if available) • Existing metrics • Work measurement studies • Employee surveys • Interviews of key stakeholders
Initial Deployment	<ul style="list-style-type: none"> • At the initial deployment, you will likely not have new quantitative metrics. 	<ul style="list-style-type: none"> • The primary audiences for initial deployment metrics are prospective users. At this stage in the life-cycle, they are most interested in how your solution will have a positive impact on their day-to-day work. • Metrics will largely be of the same type as in the Planning stage, but the focus of your qualitative metrics story needs to be on short term, immediate benefits - not long term value. 	<ul style="list-style-type: none"> • Employee surveys (though be very careful about not over-using this approach) • Interviews of key stakeholders

Life-cycle Stage	Recommended Types of Metrics: Quantitative	Recommended Types of Metrics: Qualitative	Sources
Pilot Conclusion	<ul style="list-style-type: none"> Same metrics that you used to calculate a baseline. 	<ul style="list-style-type: none"> Usage anecdotes - specific examples from pilot participants where they describe how they used the solution and what they estimate the value to have been. 	<ul style="list-style-type: none"> Follow up work measurement studies Surveys of pilot participants Follow up interviews based on survey responses
Ongoing	<ul style="list-style-type: none"> Same metrics that you used to calculate a baseline. Additional metrics relevant to business problem available with the new solution. 	<ul style="list-style-type: none"> Usage anecdotes with a "punch line." Collect as many "serious anecdotes" as you can and store them in a list or document where you can classify the stories by category or type. 	<ul style="list-style-type: none"> New solution system metrics Employee surveys Follow up interviews based on survey responses

3.4.2.3 Package and Present

The approach you use to package and present your metrics should be aligned with your solution objectives, your overall strategic goals, and the expectations of your key stakeholders. You may need to present your metrics in multiple ways depending on the audience. Two options include:

- Balanced Scorecard
- Dashboard

There are dozens of other approaches that you could consider for presenting your metrics. In one organization where I worked, we did a report card each year to show the impact of our collaboration solution on the business. The criteria were similar to what we used in our balanced scorecard, but the presentation helped highlight where we were especially successful and where our approach or communications or user adoption "needed improvement."

Balanced Scorecard

The balanced scorecard is a strategic planning and management system that was made popular by Drs. Robert Kaplan and David Norton as a measurement framework that added key non-financial performance metrics to traditional financial metrics so that executives would get a more 'balanced' view of organizational performance. An approach based on a balanced scorecard is especially useful in creating a framework for looking at SharePoint solution investments - even if not all of the elements of an organizational balanced scorecard are applicable. On one very successful engagement, we used a balanced scorecard approach to craft a metrics model for a new expertise location system. We knew that the solution required both changes in user behavior (to create their profiles and to use the system to find expertise) and the implementation of new technology. Our goal for the initial metrics plan was to create a meaningful way of showing executives that we had specific measurement targets for our pilot deployment and the ability to objectively track the metrics results. The most important thing we did in

advance was to gain consensus from the executive sponsors that if we achieved the target goals for the pilot, they would consider the pilot a success and recommend funding a full deployment. We wanted to emphasize that there were several different types of measures that together presented the most balanced way to evaluate the pilot success so we adapted the balanced scorecard model to show information that was especially meaningful to our stakeholders.

Think about the following categories of measures to create a balanced scorecard for SharePoint projects:

- Health
 - Are users participating?
 - Is usage sustained over time?
 - What features are being used?
- Capabilities
 - Are users leveraging the features that support the business use cases?
 - Do the users report that they are getting benefits from using the solution?
- Business Value
 - Is there a clear connection with respect to the overall business strategy?

The table below shows the elements in our balanced scorecard. When we presented the scorecard, there were three additional columns:

- Target: the goal for the metric during the period, which, in our case, was a 90-day pilot. All target metrics were reviewed with management in advance so that the key stakeholders and decision makers could define how they would measure success.
- Actual: the results measured at the end of the evaluation period.
- Differences: percentage that the target differed from the actual.

	Objectives	Critical Success Factors	Source	Sample Metrics
Solution Health	Gain frequent and sustained adoption of solution	<ul style="list-style-type: none"> High volume of needs that can't be met through existing channels Positive impact on existing workload or work processes 	<ul style="list-style-type: none"> System metrics User Surveys 	<ul style="list-style-type: none"> # of searches per week # of average users per week # unique users per week # of "hits" on key pages/sites "Usefulness rating" from user surveys % of users who say "don't take it away" at the end of the pilot
Capabilities	Provide reliable, easy-to-use technology that can be incorporated into work processes Ensure users understand objectives and how to leverage the solution	<ul style="list-style-type: none"> Solution user-friendliness and intuitiveness Solution reliability Integration of the solution with work processes and existing tools User training Effective help resources Persistent, clear communications Active, sustained management support Incorporation of collaboration into performance objectives and evaluations 	<ul style="list-style-type: none"> System metrics User Surveys Direct measurement 	<ul style="list-style-type: none"> "Usefulness rating" from user surveys # of searches per week # of average users per week # unique users per week # of "hits" on key pages/sites # Help Desk calls/week % of users trained % of pilot milestones achieved # of communications events/activities
Business Value	Demonstrate clear value with respect to the business strategy	<ul style="list-style-type: none"> Tangible, quantifiable examples of reductions in process cycle time 	<ul style="list-style-type: none"> "Serious" Anecdotes collected via surveys and follow up Estimates and/or direct measurement of cycle time 	<ul style="list-style-type: none"> # of anecdotes \$ value of anecdotes Cycle time improvement (in hours)

3.4.2.3.1 Dashboard

SharePoint 2010 provides some excellent dashboard and charting tools that can be used to present quantitative metrics and qualitative survey results in meaningful ways. A good metrics dashboard tells a story visually without overwhelming the user. Not all data requires visualizing in order to make your point. Don't go overboard picking the coolest looking visualization approach just because you can. Try to stick with simple and familiar approaches (pie and bar charts are almost always going to win out over speedometer type gauges) - but the best approach depends on the type of data you are presenting.

While some of your usage data might be interesting in "real time," most of your measurements will not need to be presented in real time in order to tell an effective story. Choose a time period for both collecting and presenting metrics that achieves a balance between the cost of collecting and presenting the metrics with the value that they provide.

3.5 How can we collect the metrics?

As you identify the metrics that you want to capture, you will need to define a measurement process to collect them. Be careful not to over-achieve on capturing and producing metrics for your key stakeholders. You are looking for the appropriate balance - you want to capture and report on just the right metrics - not too few and not too many. You want to make sure that you are not spending more time counting than you are "doing."

In an earlier section, I described some of the available system metrics in SharePoint and from third-party tools. Where ever possible, use automated approaches to capture system metrics. Qualitative metrics are harder to collect. Years ago, I had a client that was willing to share their complete metrics scorecard with actual results with anyone who was interested, even a competitor – but they weren't willing to share how they collected the metrics, which they considered the "secret sauce" in their entire approach to delivering and measuring business value. Consider the following examples of successful approaches for your measurement program.

3.5.1 Usability Testing

The goal of usability testing is to identify any usability problems, collect quantitative data on participants' performance (e.g., time on task, error rates), as well as determine user satisfaction with the solution.⁶ For successful solutions, usability testing is an ongoing process, which means that you can and should be using this process to capture value metrics for your solution! At a minimum, consider some type of usability testing every 6 months as an element of your measurement program.

Usability testing does not have to be an expensive proposition. Usability expert Jakob Nielsen says that elaborate usability tests are a waste of resources. The best results come from testing no more than 5 users and running as many small tests as you can afford.⁷ I have personally conducted many usability tests and I have been able to see first-hand how valuable testing with only 5 users can be.

In the balanced scorecard example shown earlier, we incorporated measures of usability in a post-pilot survey for a new collaboration solution in addition to a more formal usability study. Here's what we asked users and the "metrics" we created:

⁶ Peacock, Marissa. "The What Why and How of Usability Testing." April 13, 2010.
<http://www.cmswire.com/cms/web-engagement/the-what-why-and-how-of-usability-testing-007152.php>

⁷ Jakob Nielsen's Alertbox, "Why You Only Need to Test with 5 Users," March 19, 2000.
<http://www.useit.com/alertbox/20000319.html>

Usability Question	Metric
If presented the choice, do you want to keep the solution? <ul style="list-style-type: none"> • Don't take it away • Take it away 	"Don't Take it Away"
Usability/friendliness - how does the usability of this solution compare to other solutions you use on a regular basis? <ul style="list-style-type: none"> • Much easier to use • Easier to use • About the same • Harder to use • Much harder to use 	"User Friendliness Rating"
How easy and intuitive was the solution to use for each of the following [specific task]? <ul style="list-style-type: none"> • Very easy • Easy • Moderate • Difficult • Very Difficult 	"Intuitiveness Rating"

3.5.2 User Feedback

A great way to collect qualitative metrics on an ongoing basis is to make sure that all your sites and pages include a feedback button or link and/or a link to a site or page owner that provides the ability for users to provide feedback. If feedback is distributed to individual site owners, you will need to provide a mechanism to ensure that qualitative feedback is shared with the team responsible for solution metrics, which could be the site owner but might also be the business owner of SharePoint as a whole. Keeping track of what users take the time to note about your solution is a great way to monitor value on an ongoing basis.

3.5.3 User Surveys

Periodically survey users to identify users with good value stories – and then interview the users to capture both the story and their estimate of value. Ask questions such as:

- What have you found on [the solution] that you have been able to re-use?
- How much effort did that save?

One technique that might help collect good "serious anecdotes" from periodic surveys is to give respondents an option to follow up the survey with an interview. Here is a question that you might add to your user survey:

- If you prefer, we can contact you directly to gather this information. We would take no more than a couple minutes to record your experience. Would you rather have us contact you?

Keep all stories in a repository with good metadata so that you have the results available to report or demonstrate as needed. Keep a list of user quotes to use in presentations and reports.

3.6 What do the metrics tell us about how we should change?

I often tell clients that there is only one thing that any of us can guarantee about our businesses – that they will change. The complex and dynamic nature of pretty much all organizations means that the SharePoint solutions we build are going to have to be flexible enough to change in order to continue to provide value. The measurement program is thus critical to provide input to how the solution can be adapted over time to continue to provide value.

Use your measurement framework to assess how users are taking advantage of the solution and let it act as an early warning system to identify both new metrics and new capabilities that can help achieve your business objectives. When a metric shows an unexpected result, try to find out why the result occurred to see if it might be related to a one-time event or whether it is an indicator of a trend. Ask yourself if the result you are seeing tells you that you may be measuring the wrong thing. At the very least, metrics will help you get ideas for how to improve your solution. Collect and prioritize these new ideas and go back to your original plans and assumptions to see if they need to be changed. Then, build consensus on what needs to be changed, how to make the change, and when and how to introduce the change to your users.

4 Next Steps

Metrics alone won't make your SharePoint solution successful. To be helpful, the metrics need:

- A person whose job it is to monitor them
- A person or team who is accountable for making changes based on metrics analysis.

In other words, it's as important to have a plan for acting on metrics as it is to collect them in the first place! Identify who will be responsible for producing and reviewing metrics reports. This will likely include people from both your SharePoint administration team and business owners.

Evaluate whether the best approach to capture and monitor metrics is via a third-party tool or custom code. Custom reports using existing data may provide the least expensive option for capturing the desired metrics but using a third-party tool will provide the most flexible long term solution. Most of the third-party tools that are designed to work with SharePoint have capabilities to leverage out-of-the-box metrics and collect and capture additional custom metrics. They typically provide a repository for collecting metrics so that trending analysis can be accomplished for key metrics.

Once you decide the specific approaches you will use for your SharePoint measurement program:

- Develop a plan to capture qualitative metrics.

- Develop a library or list to capture and categorize qualitative metrics.
- Develop an approach to produce regular metrics analysis (e.g. balanced scorecard showing both qualitative and quantitative metrics as well as actions taken as a result of metrics analysis).

5 Appendix A: Examples of Intranet Measures

If you are the SharePoint intranet owner or you are creating a measurement plan for the intranet owner, then there are some specific measures you are going to want to focus on - not just to measure the business value of the solution but also to look specifically about which areas of the solution are more useful than others. The following table provides some suggested metrics for intranet owners – information that is useful to track on a regular basis:

Key Measure	Objective	Metric
Which features of the intranet are most important?	<ul style="list-style-type: none"> Knowing which pages are most used can help to prioritize which pages should be improved or developed. You can also see which business units are the biggest intranet users and which business unit's content is used the most. 	<ul style="list-style-type: none"> Page Hits "Dwell" Time (Time on Page/Site)
Which features are not being used?	<ul style="list-style-type: none"> If certain pages have low usage numbers, it is an indication that either the page is not very popular—and therefore should be a lower priority to develop—or that people are just not aware of its existence (which might be a communications or "promotion" problem). 	<ul style="list-style-type: none"> Page Hits Document Downloads
Is the site navigation effective?	<ul style="list-style-type: none"> A high number of hits on a page that is not easily accessible from the main page indicate that the popular page should be moved up in the hierarchy. Search results with no hits present opportunities to both promote content and add best bets. 	<ul style="list-style-type: none"> Page Hits on pages deep in the hierarchy
Which team sites should be archived or deleted?	<ul style="list-style-type: none"> Sites that have not been accessed in the past 12 months might be candidates for archival or deletion if the content is no longer useful. 	<ul style="list-style-type: none"> Page Hits
What are the peak/low usage times?	<ul style="list-style-type: none"> Monitoring usage trends helps identify patterns or problems and potentially alerts the Exchange Business Owner and Portal Administrator of potential user or performance issues – ideally, before they become a problem. 	<ul style="list-style-type: none"> Usage by time
How is usage trending?	<ul style="list-style-type: none"> Trending reports are available for a limited period of time within SharePoint 2010. Third-party tools are required to do multi-year detailed trend analysis. 	<ul style="list-style-type: none"> Number of users and number of unique users over time

6 Appendix B: Resources and References

In addition to the specific references mentioned in the body of this white paper, the following resources may also provide additional information to help provide insights for your metrics capture and analysis approach:

How to Measure Anything: <http://www.amazon.com/How-Measure-Anything-Intangibles-Business/dp/0470539399> – This book, by Douglas Hubbard, talks about how to measure those things in your own business that you may have considered "immeasurable," including customer satisfaction, organizational flexibility, technology risk, and technology ROI.

Jakob Nielsen's Alert Box - Current Issues in Web Usability: <http://www.useit.com/alertbox/> - This outstanding bi-weekly newsletter provides great insights into how to create useful and usable websites. While not strictly about measurement, following Nielsen's recommendations will help to ensure you have a solution worth adopting – and measuring!

Determining the Value of Social Business ROI: Myths, Facts, and Potentially High Returns: <http://www.idc.com/getdoc.jsp?containerId=225497> - This IDC Insight explores the criteria for validating enterprise social software purchases and social business transformation through return-on-investment (ROI) measurement. When determining the ROI on social business initiatives, the rules of business still remain regardless if a company applies social business initiatives to assist customer service, marketing, public relations, product innovation, employee collaboration, or other functional areas of the organization. Business executives need to understand not only the traditional metrics and value calculations of ROI, but also the impact that social business initiatives have on these computations and their interrelatedness. It is rare that organizations know how to calculate ROI for traditional company projects; the addition of social business initiatives adds another twist, making it seem difficult to calculate social business ROI, but in reality it is possible.

Social Software for Business Performance: The missing link in social software: Measureable business process performance: http://www.deloitte.com/assets/Dcom-UnitedStates/Local%20Assets/Documents/TMT_us_tmt/us_tmt_socialsoftwareexecsummary_021411.pdf - Deloitte white paper that explains why focusing on user adoption is a false metric for social computing and provides examples of organizations that have achieved success by defining success through operational performance improvement.

SharePoint Lifecycle Management Solution with Project Server 2010: <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17058> – Many organizations consider implementing SharePoint as a central platform to address a wide array of business solutions. For those organizations, it is likely that they will need a good way to track, manage, and prioritize those business requests. The SharePoint Lifecycle Management Solution with Project Server 2010 provides a framework and guidance for managing SharePoint business requests and includes two white papers and a sample dataset. Embedded in the prioritization process for evaluating SharePoint a request is an approach that asks requestors to associate their solutions with key business objectives for the enterprise as a whole or for their specific department.

About the Author

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