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*Habanero Consulting Group*

## **Building a modern intranet in Office 365**

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***Habanero helps humanize the world of work through the creation of modern workplaces and the cultural, communication, collaboration, and content experiences that power them.***

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### **Get in touch**

Toll-free: 1.866.841.6201  
[habaneroconsulting.com](http://habaneroconsulting.com)

#### **Calgary**

1420 – 144 4th Avenue SW  
Calgary, Alberta  
T2P 3N4

Phone: 403.451.8125

#### **Vancouver**

510 – 1111 Melville Street  
Vancouver, BC  
V6E 3V6

Phone: 604.709.6201

#### **Toronto**

705 – 119 Spadina Avenue  
Toronto, Ontario  
M5V 2L1

Phone: 416.260.5959

#### **Winnipeg**

427 Shaftesbury Boulevard  
Winnipeg, Manitoba  
R3P 0M2

Phone: 204.661.6201

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## 1. Introduction

In our previous white paper **Building your employee portal in Office 365** (March 7, 2015) we examined the benefits of Office 365, including key considerations, common concerns, and the relative pros and cons of customizing SharePoint Online for the purposes of building an intranet.

Fast-forward two years. Companies are rapidly adopting Office 365 and the platform continues to mature and rapidly evolve. The conversations we are having with many enterprise organizations are also shifting; whereas before companies were deciding whether or not to move to Office 365, we now see most have committed to the cloud from both a strategic and licensing perspective. Conversations now focus on making sense of what is possible, what tool teams should use when, how to start the cloud journey, and what is truly the best way to build a digital workplace in the context of Office 365.

The intention of this white paper is to review the components of Office 365 as they exist today and provide the options you have available to extend these workplace tools. We will also detail the essential elements within today's modern intranet.

It is important to note that Office 365 is a rapidly evolving service and therefore the information within this white paper should only be considered current as of the date of publication. We recommend discussing any specific topics with a trusted Office 365 expert to ensure you have the most accurate and up-to-date information!

## 2. What is Office 365 and what is included?

### 2.1 Office 365

Office 365 is comprised of many products and services that collectively deliver the potential building blocks of a compelling digital workplace. The specific tools available to your organization will be determined by the Office 365 licensing purchased by your organization.

While the platform is constantly evolving and new products and services are emerging at a rapid pace, some of the tools available today include:

#### **Office 365 productivity applications**

Office 365 includes desktop, web, and mobile versions of the business productivity tools many organizations are familiar with including: Word, Excel, PowerPoint, OneNote, and Outlook.

#### **Exchange Online**

Your email exchange server hosted in the cloud by Microsoft.

### **SharePoint Online for Office 365**

SharePoint Online is both a content publishing and collaboration platform. It is common for the content publishing features to be used as the basis for your corporate intranet. This is complemented with collaboration sites that are configured for specific scenarios and/or business processes.

Smaller organizations (100 people or less) often leverage the base features provided out-of-the-box with SharePoint, which can be configured within the platform. Mid-market and enterprise organizations often have more complex and sophisticated requirements. SharePoint is extensible and enables companies to build additional capabilities on top of the platform to support these advanced scenarios.

SharePoint Online is an evolving platform. Microsoft is continually rolling out new features at a remarkably impressive pace. These changes are first made available in tenants with the First Release option enabled within your Office 365 admin center followed by general availability to all tenants. Currently, Microsoft is putting a significant amount of focus on the team collaboration aspects of Office 365. As part of this, traditional capabilities of SharePoint collaboration sites are now being shared across other services like OneDrive for Business, Office 365 Groups, and Microsoft Teams that elevates the ‘What Tool When’ question.

### **Office 365 Groups**

Office 365 Groups offer a shared collaboration workspace where teams and groups can communicate via a group distribution email address and collaborate on documents, a shared calendar, a OneNote notebook, and Microsoft Planner task list. Under the covers, Office 365 Groups store documents in a SharePoint team site which is automatically created when an Office 365 Group is created.

### **Microsoft Teams**

Microsoft Teams is an application that combines persistent chat, Office 365 Groups, and SharePoint team sites into one single application. It’s Microsoft’s competitor to Slack.

Companies that are already using Skype for Business will find it easier to adopt Microsoft Teams as these two products will be collapsed in the near future into the single Microsoft Teams.

### **Planner**

Microsoft Planner is a lightweight task-planning tool (similar to Trello) that enables a team to easily create, classify, and assign tasks. Every Office 365 Group comes with an instance of Planner by default. It supports organizations that want to work in an agile way and keeps everyone up to date with the status of their tasks. Plans can either be private or public depending on the permissions set.

### **Power BI**

Power BI is a business analytics service that enables people to create and publish their own reporting dashboards. Power BI Desktop is an application that supports sophisticated analysis and dashboard creation. Different dashboards can be created and published as embedded content to web pages.

### **PowerApps and Flow**

Microsoft is investing heavily in empowering people to create their own business apps using PowerApps and Flow. Based on the Azure Logic Apps service, we are excited to see how this area develops. Think of Flow as a service similar to Zapier or ITTT, where you have the ability to create interactions based on events such as a file added to a library, a new entry in a SharePoint list, etc.

It is still early days for PowerApps and Flow, but we are paying close attention to the new capabilities as they are released. Before organizations adopt this technology for critical business processes, Microsoft will have to include more visibility into why things go wrong, and better troubleshooting support and options to enable proactive corrections to issues (simple email alerts, restarting flows, etc..).

Developers will be excited with the possibilities coming with the enhancements to Flow, but for power users and critical business scenarios we still recommend Nintex or K2.

### **Forms (preview)**

Forms is a new service provided by Microsoft that enables people to easily create basic forms (think of a survey or quiz). These forms can be shared with other people to provide their input.

We are excited to see this product continue to evolve and support advanced scenarios. This will hopefully include features such as a rules engine to support advanced validation, control over displaying different sections of the form as people interact with it, the ability to pull in external data from different sources, and some task-based forms to support approval processes.

### **Yammer**

Yammer is a fantastic tool for enterprise social collaboration. Public or private groups can be created based on a topic area and people can subscribe to these groups. Yammer also enables people to post notes, upload files, tag content, tag people, and like or comment on posts. Yammer also allows you to control how you would like to be notified of activity on the enterprise social network. In our organization, we use Yammer predominately to discuss business opportunities; recognize birthdays, anniversaries, and new hires; provide updates on various initiatives; and share knowledge. We even have a group to discuss what video games we are playing!

### **Skype for Business**

Skype for Business is a chat application that enables you to easily connect with people in your organization. In addition, it provides the ability to connect to people outside your organization who are also using Skype for Business (if they have the discovery option available). Skype has a presence indicator that enables you to see if someone is available, in a meeting, presenting, away, or offline. The presence indicator is automatic and is powered by your activity and your calendar. If someone's presence indicates that they are presenting, the messages will not disturb the person and will be delivered as an email. If someone is away or offline, messages are also delivered as an email indicating a missed conversation.

Skype for business will be supplanted by Microsoft Teams in the near future.

### **OneDrive for Business**

OneDrive for business is an online file repository where you can manage your personal files, share them with colleagues, and discover other colleagues files that may be relevant to you (that you have permission to view). OneDrive includes a syncing application that enables you to easily sync online files to a local drive on your computer. It will handle syncing so you don't have to worry about keeping track of the latest version of your documents.

OneDrive for Business makes it easy to sync a SharePoint document library locally, so you always have the most up-to-date content with you when you are traveling. This is a huge relief when heading to a presentation or working with teammates!

### **Stream**

Think of Stream as your company's dedicated version of YouTube. Stream supplanted the original Office 365 Video service, and enables you to upload videos, share them, or embed them in content pages easily. There is even an automatic transcription component where Microsoft documents what is said in the video using AI and machine learning!

Stream is very easy to use and we love it. Processing of an uploaded video does take a bit of time, but you are alerted when your video is ready via email and ready to send to your organization!

### **Sway**

Sway is an interactive tool that provides the ability to easily create interactive reports, presentations, newsletters, or stories.

We have yet to see Sway being used effectively in enterprise organizations. The reality is that PowerPoint is not going away and is still the presentation application of choice for most employees.

**Delve**

The classic personal profile page known as a My Site in SharePoint has been replaced by Delve. Think of Delve as your profile page where you can update information about yourself and where you can share personal files. Delve also presents the recent files you have worked on in your activity feed. Thanks to machine learning and intelligence in Office Graph, Delve also provides a collection of relevant documents that your colleagues are working on based on who you are connected to and collaborate with the most.

## 2.2 A closer look at SharePoint Online

As mentioned previously, SharePoint Online (SPO) is a continually evolving platform. Unlike SharePoint on-premises, SPO has no version year number associated with it (2010, 2013, 2016, etc.), but rather is constantly receiving a stream of updates and emerging capabilities as they are introduced by Microsoft.

In June 2017, Microsoft released their **communications sites feature set**. When you create a new site in SharePoint Online, you will be presented with the option to create either a traditional team site or a communication site. They are similar, however the use case of when you would use them may be quite different. Communication sites are geared towards supporting a one-way communication strategy where content is broadcast to a group of people. Team sites support many people collaborating on content.

**Communication sites**

When creating a new communication site, you are provided with three default layouts to choose from (Topic, Showcase, or Blank) and they are private by default.

The main navigation is on the top of the site (instead of on the left as with team sites) and communication sites are not connected to an Office 365 group and therefore don't have planner, a OneNote notebook, a distribution email, etc.

**Team sites**

Team sites (powered by Office 365 groups) are collaboration focused. All the new Web Parts introduced with the communication site are also available in team sites. The left 'Quick Launch' navigation is always displayed and can be updated easily.

**Our take**

It is still early days for communications sites, but they may be useful for simple use cases within your organization.

A potential challenge with communication sites is how people can consume or be made aware of the sites. To have news articles displayed on



the SharePoint home page, people must explicitly follow the communication site. Many organizations don't use the default SharePoint site as the landing page for their intranet, which makes it harder for people to discover new content that is published.

However, we love the new Web Part experience that has arrived. It is easy to break up a page into different sections, call out different content, and even have a related Yammer feed incorporated on your page. Creating new templates for different types of sites (communities of practice, project sites, knowledge sites) has been made even easier.

## 2.3 Third-party products and services

The third-party ecosystem for Office 365 is large and constantly growing, and you can browse the [Office Store](#) to see what is available. When it comes to a complete digital workplace the out-of-box functionality of Office 365 is likely not yet robust for most enterprise organizations without the use of some third-party products. Key products that many of our clients use include:

### **Nintex Forms and Workflow**

Automating a business process is easy with Nintex's Forms and Workflow products. We love Nintex as the return on investment can be demonstrated very quickly and the web designer supports building out complex processes.

[www.nintex.com](http://www.nintex.com)

### **Sharegate**

Sharegate has an easy-to-use tool to help manage, migrate, and secure SharePoint and Office 365.

[en.share-gate.com](http://en.share-gate.com)

### **Collabware**

Collabware focuses on simplifying records management in SharePoint and augmenting SharePoint to provide robust ECM capabilities.

[www.collabware.com](http://www.collabware.com)

### **Hyperfish**

Keeping profile information up-to-date in Office 365 may be a challenge for organizations. Hyperfish has a compelling product to solve this challenge.

[www.hyperfish.com](http://www.hyperfish.com)

## 3. What is a modern intranet?

Workplaces are transforming, including how, when, and where people work. Teams can be distributed globally, the need to perform routine tasks is decreasing, and employees are being asked to solve complex

problems, which requires increasing creativity and collaboration. A modern digital workplace isn't about having tools and technology, but rather the experience you create for your employees and how well you enable your people to use tools to help them (and your organization) succeed.

An intranet is the foundation on which you can build and deliver an exceptional digital workplace. It plays a vital role in helping organizations thrive by building intentional culture and community, helping your employees reach their potential, and supporting organizational transformation.

### 3.1 Build intentional culture and community

Culture is the heart of an organization. The best workplaces create a culture and have values that ensure employees do what is right as instinct, not policy. Culture can also be a lever for change, bring employees together on a common mission, and create a vision people can rally behind. An intranet can be foundational and instrumental in sharing, supporting, and growing your culture.

**Rich and relevant communication.** Great workplaces strive to make all communication rich and relevant. It doesn't matter if an employee is behind a desk or in the field. Targeting content to employees can help to ensure you are communicating the right message, to the right people, at the right time.

**Showcase people and celebrate success.** Stories about your people and photos can help employees understand what's happening across your organization and stay connected, especially when in the field or on the go. Social features foster dialogue, connections, and engagement and help build community and your brand from the inside out.

**Open and transparent.** Making information easily accessible breaks down silos, removes friction and barriers, and enables and empowers people to make decisions. A modern intranet builds on a foundation of trust, providing greater transparency for people within your organization.

#### 3.1.1 Example features

Areas that support building intentional culture within an organization include:

- Rich news and announcements showcase what is happening and facilitate storytelling within an organization.
- Alerts create a distinction between general news and more urgent or high-priority content.
- A listing of events keeps people informed about what's happening in different regions, offices, or teams.

- Photo galleries help people understand what is happening across your organization and stay connected, especially when in the field.
- Social liking and commenting shifts how organizations connect, collaborate, and get work done. They can drive engagement and boost productivity.
- Peer-to-peer recognition is an authentic way to build culture and recognition, a pillar of a great workplace.

## 3.2 Help people reach their potential

Making information, people, teams, and content easily accessible reduces friction and empowers decision making and autonomy. People will feel more connected to their work, be able to contribute more meaningfully, and will have better overall job satisfaction.

**Find expertise and colleagues.** Make it easy for everyone in your organization to connect and find expertise by enabling searching by role, skills, location, project, topic, language, experience, and of course name.

**Quick access to the tools and systems used daily.** Help people quickly connect to trusted tools, resources, and the systems they use every day so that they can be more productive and focus on high value work.

**Collaborative teams.** Enable teams, communities, and groups of people to collaborate and work together crossing geographies, expertise areas, and departments. Surface team sites where people can easily find them, join them, or access information from them.

**Make the content theirs.** Provide ways for people to curate information to make it more relevant, leveraging bookmarking, role-based toolkits, or subscription models based on interests, region, or possibly departments.

### 3.2.1 Example features

Some of the features that help engage and empower people to do their best work and reach their potential are:

- Simple navigation paired with a well-thought-out information architecture, that is fast, simple, and flexible.
- A way to capture frequently accessed pages, tools, or sites via a personalized list of links.
- A knowledge and tools repository to help people find the tools they need and enable organizations to manage their intellectual and capital knowledge.
- A robust people finder and search.

- A team site directory that provides a central location for you to surface team and collaboration sites across your organization.
- Personalization and preference setting to enable employees to opt-in to receive information most relevant to them.
- Capture in-the-moment feedback and suggestions from employees to improve the content and tools you provide via search feedback or in-page feedback.

### 3.3 Support organizational transformation

To keep pace with continuously evolving industries and work environments, intranets can be both a foundation for learning and a launchpad for innovation.

**Support the evolving work environment.** Consider the context and ways people are shifting how and where they work. Ensure your intranet is accessible on every device, anytime, and any place.

**Leverage data, metrics, learning, and insights.** Connect day-to-day decisions to your purpose, goals, and priorities. Surfacing metrics across your organization can help people understand your organizational performance indicators. This can range from leveraging and sharing your intranet analytics, surfacing your company's KPIs, and harnessing machine learning and the power of chatbots and Delve.

**Drive innovation through chance collisions.** Enterprise social networks are shifting how organizations connect, collaborate, and get work done. The successful adoption of these tools can help drive engagement, create connections, distribute knowledge, and contribute to developing ideas and innovation.

#### 3.3.1 Example features

Some of the features that support organizations as they continuously transform are:

- Measurement and analytics that are relevant and easy to interpret. Sharing learnings and providing insight and opportunities to leverage real actions and data within the context of the intranet.
- Leverage Yammer and social networks to help people connect and have meaningful conversations.
- Build an intranet using responsive design to make the viewing experience exceptional on every device.
- Leverage polls to gain insight into the pulse of your organization.

- Introduce chatbots to help connect people to content across disparate systems in a friendly and conversational way.
- Provide analytics dashboards that give content authors easy to understand and relevant insight into how their content is performing.
- Display KPIs that include corporate performance indicators to help people connect their day-to-day actions to the metrics that matter.

## 4. Getting started

At this point, you might be excited by the potential benefits that a modern intranet could offer to your organization, but are likely contemplating where to get started and how to leverage the tools you already have available in Office 365.

The first step in any successful project is often to ensure you have the executive buy-in to proceed and identify the executive sponsor(s) of your new intranet. Cost and scope is going to dictate approach, but we would suggest breaking up the project into a few phases. These are typically:

- Discovery
- Implementation
- Rollout and future updates

### 4.1 Discovery

As part of the discovery phase we recommend consulting with leaders and key business stakeholders to determine the goals and priorities of the intranet, identify key pain-points and opportunities, as well as facilitating buy-in for a team to support the intranet in the long-term.

Ideally at the end of the discovery process, you will have determined the following:

#### **Roadmap**

A roadmap details the functionality available at go-live and what is planned for future releases (can be up to 3 years). Some of our clients prefer a big-bang approach – all the features on day one, while others prefer rolling-out different features at different stages.

Creating an effective roadmap takes a bit of work and should include stakeholder interviews, employee interviews, prioritization workshops, and a prioritized feature list. [This article on using a roadmap to bring your portal to life](#) is an effective and practical guide to creating a roadmap for your intranet.

**Information architecture, content strategy, and governance**

Effective, high-quality content is critical to the success of any intranet. During the planning and implementation of your new intranet, it is important to define a strategy and actionable process to ensure the intranet is populated with useful and usable content. There are four key phases to cover in the process:

- Audit existing content
- Gather, rewrite, and create content
- Migrate content
- Post-launch content activities

The initial activity in this process is to evaluate the current state using a content audit which provides a clear picture of the content that currently exists, who owns it, the state it is in, and what needs to be completed to prepare it for the new or updated intranet. It may be tempting to bring over all of the content from the old intranet as is, but not everything that exists in the current state should be moved over. Content should be carefully assessed to ensure that only relevant, useful, and necessary information is brought over. Consider the job and audience of each piece of content and don't bring anything over that doesn't have a clear purpose. You will find most content needs to be rewritten and a lot can be archived or deleted. A content audit also helps to identify any content gaps that currently exist and need to be addressed.

This content audit or a light-weight content inventory can be a great input for designing the new navigation structure (information architecture). A card sorting exercise provides additional insight into the mental models of the people using the intranet and their common tasks. We recommend using a task-based information architecture (not organized by your company structure).

Creating a content strategy helps to identify the content that needs to be there on day one, what can be brought over after launch, and a sustainable plan to maintain fresh content through a content calendar.

Governance does not have to be a hairy topic when it comes to SharePoint. Our recommendation is to start simple and adapt as needed as you figure things out. There are also third-party tools that can help with auditing and reviews (such as ShareGate and Metalogix). Ideally, you have someone identified that owns the intranet from the business perspective and have technical support as needed. Some of the things you will want to consider are:

- The default permissions model (acknowledge there will always be exceptions!). The SharePoint online access request process can be used

effectively if the proper site owners have been set up. We recommend allowing everyone to have access to non-sensitive information, this approach supports the idea of transparency and openness.

- What is sensitive information and what should be uniquely secured.
- External access: will you allow sharing content with external people?
- What is the process for making changes to SharePoint Online and what change might need to go through a change control process?
- How are new sites created? Will you let anyone create a new site or is this controlled by IT to prevent content sprawl and ensure the person feels supported in setting up their site.

**A phenomenal design**

People like to see what they are getting. Nothing beats detailed mockups or prototypes to communicate what the final intranet will look like and what types of interactions are possible.

**Assembling a team**

Who is the team that will support the intranet project? Who is providing content? Who owns the intranet? A successful enterprise portal usually has the following roles defined:

Role	Responsibilities
Intranet Steering Committee	<ul style="list-style-type: none"> <li>• Makes decisions on key project criteria including scope, budget, timeline, and resources</li> <li>• Reviews project deliverables</li> <li>• Supports governance and change management activities</li> </ul>
Project sponsor	<ul style="list-style-type: none"> <li>• Provides sign-off on key project deliverables</li> <li>• Removes any organizational roadblocks</li> <li>• Champions project within your organization</li> <li>• Acts as a project escalation point of contact</li> </ul>
Working team	<ul style="list-style-type: none"> <li>• Approves the project approach, concepts, etc. on a regular basis to ensure the project progresses efficiently</li> <li>• Engages different stakeholders in their business area to keep key individuals informed and receive feedback</li> </ul>
Project manager	<ul style="list-style-type: none"> <li>• Manages the project including scope, schedule, budget, and risk</li> </ul>

Role	Responsibilities
	<ul style="list-style-type: none"> <li>• Schedules all your organization’s participants and project resources</li> <li>• Communicates and shares information with other parties throughout your organization</li> </ul>
Project lead	<ul style="list-style-type: none"> <li>• Defines the overall intranet experience to be created</li> <li>• Ensures all deliverables and the intranet need are met</li> <li>• Delivers content author training</li> </ul>
Information architect	<ul style="list-style-type: none"> <li>• Creates the high-level structure of the new intranet.</li> </ul>
Interaction designer	<ul style="list-style-type: none"> <li>• Creates the design, working closely with your organization’s brand owner</li> </ul>
Infrastructure architect	<ul style="list-style-type: none"> <li>• Deploys the solution to the appropriate tenants</li> <li>• Debugs any issues with environments</li> </ul>
Developers	<ul style="list-style-type: none"> <li>• Creates the solution code</li> </ul>
IT / Support	<ul style="list-style-type: none"> <li>• Provides assistance to the project team and end-users as needed</li> </ul>
Content lead and authors	<ul style="list-style-type: none"> <li>• Completes the content audit</li> <li>• Manages all content authoring, editing, and migration</li> <li>• Works with internal subject matter experts to create all required content</li> </ul>
Stakeholders	<ul style="list-style-type: none"> <li>• Participates in stakeholder interviews</li> <li>• Reviews information architecture related to the business and provides content as required</li> </ul>
Employees	<ul style="list-style-type: none"> <li>• Participates in interviews</li> <li>• Participates in usability testing</li> </ul>

**Change and communication plan**

Change is hard for people, but having a great communication plan and supporting people with the change that is coming is an excellent way to ensure adoption is high and your new digital workplace will be well received. Our clients often create launch videos, which describe the high-level features (and how they help employees) and introduce the new intranet in a fun and exciting way.



### **Analytics and measurement**

A modern intranet should provide solid insight into how engaged employees are, what messages are resonating, how people are finding information, what devices they are using, etc. We recommend conducting a measurement planning workshop, so when you are ready to create the intranet it is clear what type of outcomes are important to capture.

### **Technology approach**

Ideally, you have had the opportunity to evaluate SharePoint's out-of-the-box capabilities, reviewed products in the market, or maybe even evaluated internal capacity for developing an intranet in-house on SharePoint Online (see Customizing SharePoint below).

## **4.2 Implementation**

If you have decided to take on the implementation / configuration internally we recommend following an agile approach to software development and dividing the work into two-week sprints. Each sprint should be treated as a feature complete release and should include sprint planning, development, quality assurance, and feedback from the business.

You will want to ensure the following is true:

### **Get feedback early and often**

Getting feedback early in the process with a group of engaged users is a great way to ensure the roll-out will be a success. It gives the team the time to do something with the feedback before go-live and helps to prioritize what is important.

### **Migration and content**

It is important to determine what content is critical, important, or nice-to-have for day one. Create a plan that indicates what content must be migrated and created and who will be responsible.

### **Training**

Content authors and key supports will need to be trained to ensure a successful launch. Organizations often adopt a “train-the-trainer” approach to alleviate the burden of having one or two people conduct all the training.

## **4.3 Roll-out and future updates**

A communication plan is key for day one. As mentioned earlier some organizations have launch videos while others release teaser posters and articles on their existing intranet leading up to the launch day.

It is important that the intranet team is exceptionally responsive in the first three weeks after launch as you want to ensure people feel supported. Provide a mechanism for collecting feedback and responding to it so people know their feedback is valued.

Plan to review analytics regularly and track broken links that may have resulted from content migration, what people are searching for, what devices people are using, etc. Initially you can expect there to be some search tuning, such as configuring promoted results to make it easier for people to find content, adjusting profile searches, etc.

Develop a content schedule for creating news articles and reviewing existing content.

#### **Future roadmap**

Launching an intranet is the first step in the journey. If there is no future strategy and no continuing focus and effort, adoption will drop-off after launch. Consider strategies to keep people engaged, including weekly photo contents, surveys, and newsletters pointing to articles on the intranet.

You should also be on top of the new features Microsoft is releasing as part of Office 365 and prepare the business for any impacts.

## **5. Customizing SharePoint Online**

Do you consider yourself a developer? If not, you may want to save yourself the trouble and skip this section, it is meant for the inner geek in us or those that play a technical role in your organization.

### **5.1 Responsible development**

At Habanero, we believe in the value of customizing SharePoint, but understand that customizing the platform must be done in a responsible way to ensure that ongoing feature upgrades are low-risk (or as low risk as possible).

There are a number of common customization and/or development approaches you can use to customize SharePoint including:

- SharePoint Add-ins
- Direct-embedded client-side REST/CSOM API
- CSOM API via PowerShell or C#
- Office 365 APIs

### **5.2 The golden rules**

No matter what customization technique is selected we have a number of golden rules when building solutions on top of Office 365.

### **Providing a great user experience is paramount**

No single factor (other than the fact that the system actually works) is more paramount to adoption than user experience. Your intranet's user experience should help your end-users achieve their goals, reinforce your organization's brand, and where appropriate add delight. We believe intranets shouldn't be tolerated, but rather be loved.

### **Responsive design is a must**

With the proliferation of mobile devices in the enterprise responsive design is a must. A responsive portal enables employees to access the information they need from any device, anywhere.

### **Don't mess with the Office 365 suite bar!**

The suite bar is located at the top of the screen and it is shared across each of the Office 365 services. Microsoft has updated the suite bar in Office 365 a number of times. If you customize the suite bar your solution will likely break when an update is released. Don't do it!

### **Site structure and navigation impact performance**

The structure of your SharePoint Online site has a major impact on page loading performance. In our experience, the time it takes to process every additional visible sub-site is somewhere between 30-300 milliseconds. As such you should be able to figure out the maximum number of visible sub-sites you can have before the page loading time for your site exceeds the desired threshold.

### **Make your CSOM scripts re-runnable**

The Execute Query method on the Client Context object clears all the actions you have batched, regardless of whether or not they are successful. When you have deployments that can take upwards of an hour, it is not fun having them fail part way and having to restart your process!

### **Use the development model that is the most suitable for the task at hand**

As we will illustrate below there are a number of different development models you can use to customize SharePoint. Select the one that is the most appropriate for the specific task at hand.

## **5.3 Which development model should I use?**

Below we have provided some guidance on when we believe each model is the most appropriate.

### **SharePoint Add-ins**

SharePoint Add-ins, formerly known as "apps for SharePoint", can be hosted in SharePoint Online (both add-in parts or immersive full-page

experiences) or be provider hosted (on-premises, Microsoft Azure, or in another environment). SharePoint Online add-ins only allow client-side script and are limited, whereas provider-hosted applications allow for server-side hosting.

You should use the provider-hosted model when the add-in contains substantial business logic (immersive or full-page) or when integrating with internal systems that:

- Access a secured file system using a specific Windows account
- Make a Web service call to a line-of-business system such as SAP using a Windows Service Account
- Connect to SQL Server
- Query Active Directory to discovery user membership of a certain group or distribution list
- You should note that there are some significant user experience issues with add-in parts
- Animation: you must kick off a postMessage for every pixel move
- Style inheritance: you can reference core CSS but none of the custom CSS from the parent, which makes sense for SharePoint Store Add-ins but not when you're building a custom solution for your portal
- Responsive behavior: you often want different behavior at certain breakpoints of the parent page; even if you copy the CSS into your app it evaluates the size inside of the frame

#### **Direct-embedded client-side REST/CSOM API**

Direct-embedded client-side scripts run directly on the page being viewed (not in an iFrame). This is often recommended over SharePoint hosted add-ins as you don't have the restrictions that come from running your add-in within the iFrame and deployment is straightforward. You should use this model when:

- You are dealing with Web and document-centric content including publishing content and document libraries
- A highly responsive design experience is required
- You are using many out-of-the-box SharePoint Web Parts (e.g. the Content by Search Web Part)
- You have content rollups with display templates
- You are customizing using JSLink

### **CSOM API via PowerShell or C#**

Your solution will run outside of Office 365 and you will use the API to get data in and out of Office 365.

You should use this model when:

- Provisioning initial site structures
- Provisioning page layouts, content types, fields, and lists
- Reading and/or writing SharePoint data in scheduled batch process using a Service Account. (e.g. when transferring employee information from SAP to SharePoint Online)
- Migrating content
- Handling long running processes

### **Office 365 APIs**

The Office 365 API enables you to work with SharePoint Online data in almost any application or service.

You should use this model when:

- You wish to integrate with Exchange Online other Office 365 services
- You would like to develop native mobile apps that leverage SharePoint content
- The SharePoint add-in model is not suitable
- You don't want to launch your item from SharePoint
- We believe the Office 365 API has great potential and are very excited to see how the API matures.

## **5.4 Key insights**

Below we have provided a selection of detailed insights related to customizing SharePoint Online.

### **Application development**

New functionality is rolled out regularly based on a schedule defined by Microsoft, resulting in new features being made available to tenants automatically.

Best practices suggest that the development of new features should be completed and tested on a separate tenant configured with the same licensing type as your production tenant. We recommend turning first

release on in your Office 365 admin center so you can see the impact of new features Microsoft is incorporating into Office 365.

### **Deployments**

Deployment time is often longer in SharePoint Online (compared to an on-premises deployment) as everything must occur remotely, and there is often much greater latency (especially with the transfer of content).

### **Look and feel**

Custom CSS files are fully supported. However, all branding artifacts must be uploaded to every site collection in order to provide unified branding across multiple site collections.

Applying custom branding on personal sites is challenging as it requires building custom add-ins. Also, the regular addition of new features or changes to existing features may inadvertently impact branding customizations.

### **Navigation**

The out-of-the-box navigation experience is suitable for many different portal types. However, since the navigation components are usually implemented as server-side components, it is much harder to introduce customizations in SharePoint Online.

Client-side navigation solutions are an option but may present a rendering delay, which may slow performance and thus negatively impact the user experience of the site.

### **Search**

Search crawls in SharePoint Online are a bit of a mystery. There is no indication of when full and incremental crawls occur and you have no control over search crawl schedules.

We have also observed an issue in some tenants that are crawling pages with friendly URLs. If the connection between the crawl service and the managed metadata service (which is where friendly URLs are stored) fails, the crawl will fail silently and the page will never be crawled again.

Finally, deleting a site or a site collection may corrupt the search index. The deleted content will never be removed from the index, resulting in search results being returned for items that no longer exist. Microsoft will remove the index entries manually if you provide a list, but this is likely not practical for most organizations.

## 6. Common concerns

### 6.1 Availability and outages

Microsoft is committed to delivering at least 99.9% uptime, with a financially backed guarantee, for Office 365.

Service degradations you can typically expect throughout the year include things like search crawling issues, managed metadata service being unavailable, and videos not being delivered properly. Keeping an eye on the Office 365 service health dashboard will help you communicate status in your environment and prepare for any planned maintenance or changes.

### 6.2 Support escalation

Navigating the basic Microsoft support organization requires patience, especially for highly skilled IT teams who are familiar with SharePoint. When initiating a support request, you must first talk to a support engineer who may not have advanced knowledge of SharePoint. These engineers often assist callers with basic end-user features and you may need to escalate your support request several times.

Once you talk to a senior-level engineer, we have found the Office 365 support to be of high quality. In addition, the engineers will often share their contact details and will have you communicate with them directly, so they can build familiarity with your specific solution.

### 6.3 Perceived data privacy concerns

Because Office 365 is a multi-tenant service, your data co-exists on some of the same infrastructure as other customers; however, Microsoft contractually commits to robust privacy and security measures in the terms of your agreement and currently complies with the following regulations (to name a few):

#### **ISO 27001**

Many Office 365 products have been verified to meet the rigorous set of physical, logical, process and management controls defined by the standard.

#### **ISO 27018**

Office 365 only processes personal information in accordance with customer instructions. Also, your data is never used for advertising, and customers are informed about government access to their data.

### **FISMA and FedRAMP**

The services provided in Office 365 adhere to the specific requirements mandated by The Federal Information Security Management Act (a federal law in the U.S).

### **HIPAA**

Office 365 provides physical, administrative, and technical safeguards to help customers make use of individually identifiable health information (also a U.S federal law).

### **European Union (EU) Model Clauses**

Microsoft is willing to sign data processing agreements containing EU standard contractual clauses with Office 365 customers. The EU's data protection laws restrict exporting personal data from the European Economic Area.

### **FERPA**

Microsoft agrees to use and disclosure restrictions imposed by the Family Educational Rights and Privacy Act that limit the use of student education records (another U.S federal law). They also agree to not scan emails or documents for advertising purposes.

## **6.4 Authentication for extranet users**

External sharing in Office 365 has come a long way since our last white paper. With an increasing number of customers leveraging the platform's external sharing capabilities, Microsoft has made an important move to ensure Office 365 becomes the place to host simple, highly-secure, and connected partner sites.

Azure Active Directory B2B collaboration is the glue that brings all these experiences together. According to Microsoft, approximately three million users were using Azure Active Directory B2B collaboration capabilities in April 2017.

With these capabilities in place, organizations can now leverage an admin-managed partner users model where admins can pre-populate your Office 365 tenant with the guest users you'll be inviting to your sites. More importantly, partners can now sign in with an identity of their choice and admins can delegate permissions to add B2B users to non-admins.

## **7. What next?**

If you are interested in creating a modern intranet on Office 365, we recommend evaluating the options in front of you carefully. Will you perform



the work in-house, leverage a partner to get up and running faster, or perhaps purchase an off-the-shelf product?

No matter which approach you take, we recommend that you start by creating a team that can support your modern intranet initiative and include them in creating a vision and roadmap for the next two to three years. Think about how you plan to measure each outcome you are trying to achieve.

We're extremely excited about the existing capabilities of Office 365 and believe that it is just a matter of time before most organizations are leveraging the capabilities within Office 365. Over the last few years Microsoft has proven their ability to continually innovate and improve Office 365.

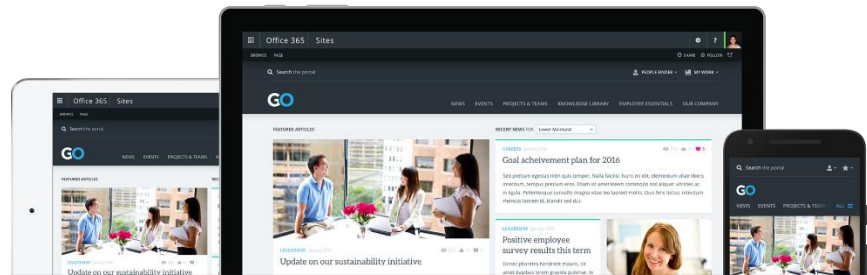
As with any modern intranet project we recommend you prioritize the end-user experience and focus on adoption. Great information architecture, user experience design, training, and change management are as important as ever and are an essential ingredient in a successful project.

## 8. Introducing Go Intranet Accelerator

To help organizations on their cloud intranet journey we created the Go Intranet Accelerator. Go was crafted from Habanero's experience helping organizations create better workplace experiences and award-winning intranets. It offers a truly remarkable foundation on which you can deliver the ultimate digital workplace experience.

Go includes rich communication and collaboration features that help your organization stay connected and engaged, and unlike a pre-built intranet product, Go can be extended to meet any business need.

Go was designed from the ground up for SharePoint Online (part of the Office 365 suite) and can also be deployed on premises.



We have a prescriptive approach to the activities listed above and can setup a new modern intranet for a client in a little as 7-9 weeks.

### 8.1 Rich intranet features

Go contains several foundational intranet features:

### **Navigation**

Go's navigation is simple to setup and manage, enabling you to create an easy-to-understand structure for your intranet. Armed with the knowledge that your analytics will provide, you'll be able to continually refine your site structure, ensuring your intranet gets better and better over time.

### **News and updates**

Go provides a clean, yet visual news experience that employees will love. Internal communicators are presented with many options to get their message across. In addition, everything can be targeted to ensure you are communicating the right message, to the right people, at the right time.

### **Mobile**

Go is fully responsive and provides an exceptional mobile experience that keeps essential elements like search and the most important navigation accessible with one click.

### **Social**

Go enables you to integrate social tools into your intranet, where and when you want. From a simple like button to a comment stream that fosters discussion, you can choose the appropriate place to include social capabilities.

### **Yammer**

Want to use Yammer as your enterprise social network? Go includes a module that displays content from Yammer. Go also connects your intranet news with Yammer, simplifying publishing and helping to ensure that likes and comments for each news article are stored in Yammer.

### **Recognition**

A culture of recognition is a key pillar of a great workplace. Go provides a simple and effective way for you to foster peer-to-peer recognition. Go's recognition features highlight both the person giving the recognition and the person (or people) receiving them, fostering stronger connections with individuals throughout your organization.

### **Events**

Go makes it easy for everyone in your organization to stay up to date on upcoming events through a better shared calendar experience. Event organizers are given an easy way to craft a better event experience that can be supported with video, photos, presentation slides, and discussion.

### **People Finder**

Go's People Finder is designed for efficiency. Type a few letters and Go instantly displays any associated individuals. Click on a person to go to their Delve or SharePoint user profile, or the link at the bottom to explore a full-featured people search experience.

### **Photos**

Photos can help people understand what's happening across your organization and stay connected, especially when in the field. Go provides a rich gallery experience that enables you to showcase photos from a big event, a new project, or someone living your organization's purpose and values.

### **Team site directory**

Go's team site directory provides a central place for you to surface team and collaboration sites across your organization. Employees can quickly find the site they need, resulting in less time searching and more time collaborating.

### **My work**

My work enables employees to access important team sites, groups, documents, and links with one click from anywhere on your intranet.

### **KPIs**

Give your organization a place to understand the metrics that matter. Go surfaces your most important corporate performance indicators to make it easy for employees to keep score.

### **Knowledge and tools**

Provide a home for your forms, policies, procedures, tools, and templates. Go has a robust library for knowledge and tools that enables employees to find exactly what they need to get the job done!

### **Dashboard**

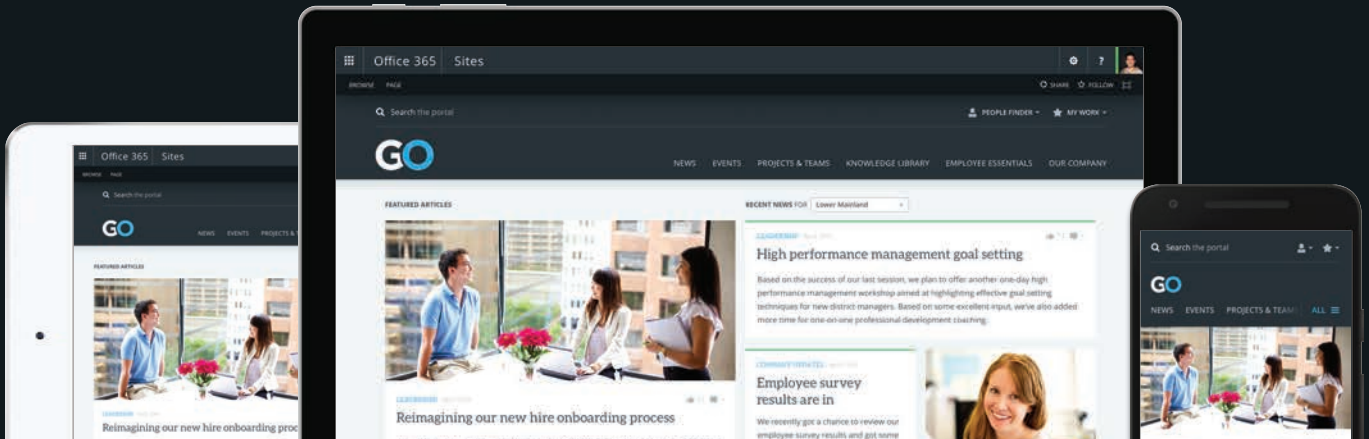
Go provides an elegant, focused user experience for dashboard widgets including weather, time zones, and stock and commodity information. Employees have one click access to these important tools from anywhere on your intranet.

To learn more about Go visit [www.connectwithgo.com](http://www.connectwithgo.com).



Intranet Accelerator

The world's best SharePoint intranet experiences start with Go.



Do more. Spend less. Go.



**Build a better workplace**

Rich communication and collaboration features help your entire organization stay connected and engaged.



**Don't get trapped in a box**

Unlike a pre-built intranet product, you aren't limited to basic features and stuck with an inflexible product.



**Be supported**

Each Go intranet includes Habanero's industry-leading intranet consulting services to ensure success.



**Adopt Office 365 on your terms**

Move to the cloud when you are ready. Go supports SharePoint Online, SharePoint 2016, and hybrid models.



**Leverage the building blocks of a successful intranet**

Go offers a set of modular components we believe every great intranet should have.



**Empower your IT team to get more out of Office 365**

Go includes a simplified development framework and automated deployment tools that make it significantly easier for in-house teams to create solutions in Office 365.



**Make it your own with a flexible design system**

Go includes a design foundation that can be customized and extended to reflect your unique brand identity.

Learn more and request a free 30-day trial at [connectwithgo.com](http://connectwithgo.com)