

A man and a woman in business attire are looking at a laptop in an office setting. The man is on the left, resting his chin on his hand, and the woman is on the right, holding a folder. The background is a blurred office with a window. There are green and blue diagonal stripes in the top right corner.

Using Microsoft™ SharePoint
for Policy and Procedures
at scale.

7 Documented Challenges

About this guide

This guide highlights seven documented challenges mid and large organizations face in utilizing SharePoint for Policy and Procedure management.

However, there is a role your SharePoint implementation can play in making it easy for employees to find policies and procedures.

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Using the right tool for the job.

If done right, standard operating procedures (SOPs) and policies can transform business results. It's common to see dramatic improvements like 50% faster employee onboarding, 65% reduction in errors, lowered training and staffing costs, faster application rollouts.

Unfortunately, most organizations are spending hundreds of thousands of dollars yearly and not getting these kinds of results. Why? Because they're not using the right tool for the job.

General-purpose tools like MS Word and SharePoint are wonderful for certain applications but are not suitable to meet the rigorous challenges of Policy and Procedure communication – especially at scale.

It's sort of like a large corporation using MS Excel for their accounting.

Further, disjointed approaches -- duct-taping Word and document managers like SharePoint together - - gets messy fast, leading to waste, high costs, risk exposure, and lost revenue.

Why Zavanta?

Zavanta is a Policy and Procedure Standardization platform that automates all content life cycle phases.

Unlike monolithic documents, Zavanta uses a “structured content model” in which content is “chunked” into reusable modules making it easy to create, consume, update, track, translate, find, and re-purpose for multiple audiences, uses, and devices.



Structured Content is easier to create, consume, update, track, translate, find, and re-purpose for multiple audiences, uses, and devices.

Case Study:
Colonial Savings

Thousands of dollars invested in MS SharePoint wasn't working.

Colonial had no easy way to document policies and procedures; often important policy was communicated via email or word-of-mouth. The Servicing area developed an MS Word + SharePoint system for policy and procedure documentation, which was determined to be the best-fit solution at the time.

According to Senior Compliance Analyst Mahlon Meier: "Our change management process was completely manual and very labor-intensive. We had a lot of procedures on SharePoint. SharePoint gave us no help in developing the policy and procedure documents.

We wanted a more complete solution; one that would help us document our policies and procedures and provide better change management."

Colonial began their search for a solution. As with any major change, they encountered some resistance especially since the SharePoint system was so well established.

"When our team and executives understood the capabilities of the newly released Zavanta Cloud product, many of whom saw a demo, it was like a switch went on. Zavanta was a complete solution; it had everything we were looking for. Zavanta gives us visibility to the entire process; you can see where a document is in the flow."

Colonial now has a modern, online "Company Knowledge Base" that is auto-generated by Zavanta. Employees in Servicing can log into it and access policies and procedures that cover topics such as "Code of Conduct", "Property Inspections", and "Flood Insurance." Employees can use the built-in search engine or use different navigation paths or even perform keyword searches within categories.

Unlike MS SharePoint, the setup and ongoing maintenance of the knowledge base requires no IT support. Updates go out in seconds, documents are automatically placed in the right category.

7 Challenges using MS SharePoint for Policies and Procedures

In a nutshell, SharePoint is a multi-purpose development platform that with enough IT resources (or an outside firm) you can use to engineer a system to manage policies and procedures whereas Zavanta is a complete turn-key and proven software application designed for business users that is ready “out of the box” and can be easily configured to your organization’s preferences.

Here are some other things to think through as you are weighing what solution is best for you. Below are a few of the problems organizations have reported when using SharePoint as their policy/procedure platform, that Zavanta solves.



#1: Duct tape method doesn't work



#2: No standardization / content quality controls



#3: Versioning / audit tracking issues



#4: Cost: requires developers / IT



#5: Life cycle workflow complexity



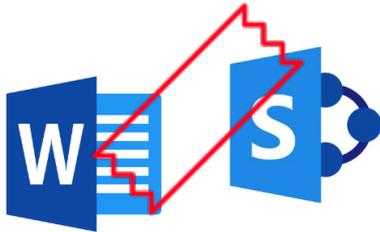
#6: Disorganized Information Architecture



#7: Failed initiatives / adoption issues

7 Challenges:

#1: Duct tape method doesn't work.



SharePoint

SharePoint is a general-purpose tool. Authoring and editing is done in another tool, typically MS Word. This means you have to duct tape tools together, which is cumbersome, inefficient and error-prone.

Zavanta

Zavanta is an integrated solution. No inefficient check-in / check-out is needed. Zavanta integrates all life cycle phases from authoring to review to publishing.

#2: No standardization / content quality controls



SharePoint

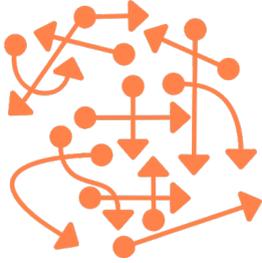
SharePoint is designed to help organizations locate, share, and manage files. It does nothing to support the creation, standardization, and maintenance of usable content.

Zavanta

Zavanta has built-in quality control and content standardization. It fills the gap Word templates can't: content usability and consistency across authors.

7 Challenges:

#3: Versioning / audit tracking issues.



SharePoint

SharePoint's change tracking and document compare is cumbersome, especially in situations where several users are making changes to documents at the same time and doing so in real time.

Zavanta

Zavanta has robust controls to ensure version integrity and controls to determine who may work on documents in any status or stage of its life cycle. A full audit-trail is automatically maintained for you with the ability to easily view changes, compare versions and roll-back changes if needed without ever losing back versions.

#4: Cost: requires developers / IT



SharePoint

SharePoint requires significant investment of staff time to build and maintain, sometimes requiring added headcount in IT or external consultants. Training, project management, and standards management create additional labor costs and barriers to success. Our customers have reported that with SharePoint they often have to wait days for small changes or updates to go out.

Zavanta

Zavanta provides not just software-as-a-service, but a team of highly-skilled support resources to assist you. Zavanta is designed so that business users can manage and maintain the system. The only IT help needed is at the beginning with SSO or integration with other systems such as HR. All of this means faster and more successful adoption, lower operating costs, and higher ROI.

7 Challenges:

#5: Life cycle workflow complexity



SharePoint

SharePoint's workflow capability is complicated and not designed so that business users can set it up or change it themselves. A developer is required

Zavanta

Zavanta comes "out of the box" with standard workflows that automate the complete life cycle. Because Zavanta was designed for non-technical business users, it's easy and fast for users to make changes and create new workflows. Authorized users have visibility to the entire process; it's easy to see where any document is in the flow.

#6: Disorganized Information Architecture



SharePoint

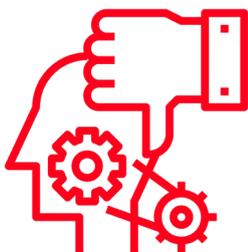
SharePoint does not provide context or easy segmentation of content or search results by role, location, topic, or other parameters. It simply houses and controls documents and presents links to documents using only the metadata you give it.

Zavanta

Zavanta provides a very flexible and **Reader-friendly Portal** experience that you can tailor to the needs of your organization and reader preferences. As a result, employees actually read and use the content. You can segment content for viewing anyway that best suits the needs of your employees.

7 Challenges:

#7: Failed initiatives / adoption issues



SharePoint

In an AIIM Market intelligence survey, a substantial percentage of respondents (40 percent) reported their SharePoint implementations aren't successful, with two-thirds (67 percent) having blamed that on inadequate user training, 66 percent said it's too difficult to use and 64 percent report that lack of support from senior management is the reason that their deployments have failed.

Zavanta

With Zavanta, you get robust user support, coaching, training, and mentoring designed to maximize your success. Many of our current clients came to us after trying—and failing—to successfully use SharePoint for their policy and procedure management platform.

Summing it up:

The million-dollar mistake we want you to avoid.

A global aeronautics corporation wanted to capture “lessons learned” across the organization so everyone could function more effectively. The CEO commissioned the team to create a knowledge Management system in MS SharePoint. Noble goal!

They imported thousands of their documents into it. But when employees clicked on a link to open up “best practice” they were confronted with the same old stuff: pages of text blobs, disjointed, unusable content. Consequently, employees didn’t use the system.



Zavanta and SharePoint can work together

With OpenSearch, your employees can use SharePoint's search engine to find and access content in your Zavanta-generated Employee Portal. You can also put a link to any page or document in your Employee Portal to a location within SharePoint.

This integration lets you leverage your SharePoint investment and at the same time, take advantage of Zavanta's strengths: the creation, management, and delivery of high-quality, standardized Policy and SOP content.

Want to learn more? [Contact us.](#)

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