10 My Site Best Practices

The SharePoint My Site allows users to create a "personal portal" in the corporate SharePoint environment. Some organizations expect users to use the My Site to replace their private C: drives – the My Site is backed up and therefore, content won't be lost, and optionally, users can share their personal content with colleagues very easily, increasing knowledge transfer and decreasing the requirement to e-mail content back and forth within the organization.

The My Site is also a place for users to share personal and professional interests and expertise and, with privacy settings, decide to whom most of this information will be shared. However, SharePoint 2007 My Sites were not engineered with the idea that they would become an organization's "internal Facebook." In fact, compared to Facebook and other social networking sites, the My Site "out of the box" looks pretty primitive. Moreover, people are generally more passionate about their personal spaces on Facebook or My Space if only because those sites allow them to connect with people *outside* of work, including people from pretty much any dimension of their lives – high school, college, former work colleagues – and also, if they *choose*, current work colleagues as well.

Here are 10 best practices to consider to get the most value from SharePoint My Sites:

1. Understand your Business Objectives

It's important to understand what business problem you really want to address with the My Site. For many organizations, expertise location is a primary area of concern. My Sites enable expertise location directly in the profile information but indirectly as well if a user publishes a blog from her My Site. My Sites can also help identify internal relationships via the "colleague tracker" and identify an organizational hierarchy if this information is accurately "sourced."

2. Find Sources of Automated Content

One of the challenges with the My Site is that you can't rely on users to continuously update their profile information so it's important to integrate the SharePoint Profile, which is exposed on the My Site, with Exchange, AD, and HR systems. As much as possible, try to get content for the My Site from authenticated existing systems that you can synchronize with SharePoint (or Active Directory).

Also, if expertise location is an important business objective, remember that there other sources of expertise in SharePoint, for example, the Author/Created By/Modified By person associated with a document. If you find the topic you are searching for in a document, you can examine the document properties to find the Author (assuming that people create their own documents rather than "borrowing" a template from someone else's document) or look at the Created By or Modified By metadata (assuming that people upload their own content rather than asking a "concierge" to update on their behalf).

3. Let People Choose Their Picture

People really like being able to choose the picture that displays in the profile so if possible, allow users to upload their own picture. Don't assume, however, that people will know what's appropriate without publishing some guidelines. Let people know what kind of pictures work best <u>and</u> provide guidelines about size. For example, suggest a low resolution and .jpg format – keep the file size to somewhere in the 50-75 kb range and crop the photo to show primarily just the head and neck.

4. Think About What Attributes You Want To Expose in the Profile

Decide which of the “out of the box” attributes in the profile are important to your organization. Do you expect people to fill in the Past Projects attributes? Maybe not, because most people won’t fill it out anyway. If this is the case, customize the My Site so that this field isn’t even displayed. I personally don’t know how the Responsibilities attribute would have any content in it that wouldn’t also be in my “About Me” section so I’m not a big fan of this one either. I do think the Birthday is fun – who doesn’t like getting a few extra presents – but be sure to make it clear that you do not expect people to fill out personal information if they are not comfortable sharing it. Get some advice from Legal about whether or not you should even ask for Home Phone but if you do, be sure to show users how to hide personal information from different audiences.

Think about what additional attributes you might want to add: Networking Groups, Blogs I Follow, etc.

5. Define What “Skills” Means for Your Organization

The “out of the box” Skills attribute may be too unstructured for your organization. This is something to think about in advance. If you want to use the attribute “as is,” be prepared to provide a clear definition of what constitutes having a Skill. In one of the companies where I worked, we created an expertise profile that we expected all consultants to contribute to. We allowed people to enter pretty much any type of expertise, but for any topic in which you declared an expertise, you had to choose one of the following to show your depth of knowledge:

- Knows About – You have information about the subject and can help direct inquiries. (The “rule” on this choice was that you weren’t supposed to use it for anything that wasn’t an emerging or under-represented technology or practice – we didn’t want the database loaded with people who “know about” common areas of expertise.)
- Functional – You have used the discipline and can apply it to moderately complex problems.
- Advanced – You have used the discipline extensively and can assist others in applying it to complex problems.
- Expert – You are experienced in all aspects of the discipline and are able to develop creative solutions to complex problems. You can educate others.

6. Provide Guidelines for *All* Attributes

Don’t assume that everyone will automatically know what to put in the “About Me” section. Provide examples and guidelines for what makes a good profile description. Don’t assume that everyone will know what an appropriate profile looks like. If a casual photo is OK, be sure to say so, but you may want to add something to the effect that all photos should be in clothing and in a setting that you would consider appropriate for work. (I’m pretty sure this will be a necessary statement for the “Facebook generation.”) Make it very clear which attributes *should* be filled out and which attributes are really optional. Make sure that you provide reasons for asking people to fill out the information – remember to answer the “what’s in it for me?” question in your messaging.

7. Encourage Thought Leaders/Subject Matter Experts to Blog

Subject Matter Experts may fear that by making their expertise even more public on their My Site that they will get even *more* demands for their limited time. Creating a blog is a great way to share best practices, answers to common questions, and general opinions in a way that allows thought leaders to put context around the documents they publish. A helpful internal blog post might link to a document published on a team site (where users have read access, of course) and provide some context around that document that might help guide people if they want to re-use it. This same guidance could also remind “re-users” about attributing any ideas that they leverage or expand back to the original author, which can further organizational knowledge management objectives.

Blaise Pascal said (in French) something that more or less translates as “If I had more time, I would have written a shorter letter.” While blogs allow authors to provide context and thought leadership on key topics for the organization, the best blog articles are brief. You will need to provide guidance about when it might be best to turn a long blog article into a more formal White Paper or Best Practice. My general rule is that if the blog article is so long that most users will need to print it in order to have time to digest the contents, it probably should be written as a white paper and the blog post should provide a brief description and context.

8. Encourage Executives to Blog

This is pretty controversial, but if an executive will really write the blog (rather than getting Marketing to write propaganda), an internal and interactive executive blog can be a great way to promote transparency and encourage communications and conversation within the company. Or not. Proceed with caution, but it doesn't hurt to give it a try.

9. Look to Microsoft for Guidance

I am often surprised at the richness of some of the documentation "no one knows about" on Microsoft.com. Here are two My Site-related documents that are worth checking out:

- Intro to My Site: http://office.microsoft.com/en-us/sharepointserver/HA101087481033.aspx?pid=CH100964111033

- Role based templates: http://office.microsoft.com/en-us/sharepointserver/HA102147321033.aspx#2

- White Paper on How to Get the Most Value from Social Computing: http://www.microsoft.com/downloads/details.aspx?FamilyId=C5844123-7F31-49D4-811C-7B90E6217B1D&displaylang=en

10. Instead of Looking for all the Reasons Not to Allow My Sites, Try Them in Pilot Mode and Get User Feedback

I've worked with several clients who have intentionally disabled My Sites from the get-go. They each have all kinds of reasons but the most commonly cited are 1) Privacy and 2) Control (meaning, we can't control what people will post, there for we won't allow them). This is a little bit short-sighted in my opinion because if you ban the concept internally, that doesn't mean that something *like* the open exchange in an internal My Site blog or profile isn't already happening on the internet. It's always a useful exercise to see if there is a group already on Facebook or Linked In for current and/or former employees of your company. There are both for the companies where I've worked and in one case, in addition to Facebook and Linked In groups, we also have two Yahoo groups.

During a My Site pilot you should promote the features you really want people to use and get feedback about what people are most comfortable (and not comfortable) with. Send out e-mail invitations to a small group of pilot users who, based on their role in the organization, would likely be interested in trying out My Site. Try to pick a broad section of users – in other words, don't just pick IT! Depending on the size of your organization, this pilot group might contain a few dozen or a few hundred users. Encourage these users to add a link to their My Site in their e-mail signature. This will help drive awareness and may encourage more users to set up their My Sites.

Your goal during the pilot is to gather real usage stories that you can promote during your larger deployment, assuming your pilot is successful. A story about delivering real value to your company is a great way to build momentum. For example, did someone find someone with expertise that helped win a new contract? Did someone find a colleague working on a similar topic who was able to provide advice on a tricky or complex issue? Did someone just find someone to play tennis with after work? Obviously, you want to look for "value" based stories, but even the "human interest" stories may be relevant in your organization.

Once you've established the value proposition for My Sites, make filling the initial profile part of new employee orientation. Consider providing a template for new employees to think about what they will post on their My Site even before they start. New employees have a huge incentive to complete a My Site profile because they will not have the extensive internal network that existing employees have. Establishing an effective My Site profile is likely to help connect new employees make connections quickly and build a community that will help them become more productive in their new environment.

If your organization decides that the My Site is too limited to provide true social networking value, then consider some of the "add-ons" for SharePoint that extend the social network capabilities of SharePoint. For example, Newsgator Social Sites or Connectbeam are two companies of which I'm aware but I'm sure there are others.