



# Driving SharePoint Adoption in Lotus Notes Enterprises

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# Table of Contents

- Executive Summary.....3
- SharePoint Adoption: Early Adopters vs. Typical Business Users .....4
- Transforming Email into a Collaboration Console .....4
- Measuring SharePoint User Adoption: Collaboration Analytics .....8
- Basic SharePoint collaboration metrics include:.....8
- Summary .....9
- About Harmon.ie.....9

## Executive Summary

Many organizations are investing in Microsoft® SharePoint®, at the department level and strategically enterprise-wide, to deliver more efficient documentation collaboration and project management capabilities. However, despite the big investments, only 38 percent of users with access to SharePoint use it on a daily basis, according to an InfoTrends study.<sup>1</sup> Typical business users are hesitant to adopt team workspaces, primarily because SharePoint requires them to make significant changes in their daily collaboration habits and workflows.

To encourage people to adopt technologies that help them work more effectively in teams, without requiring a wholesale change in behavior, a growing number of organizations are investing in software that makes SharePoint easy to access and easy to use. One way to make SharePoint easy to use is to integrate team sites into users' most popular business tools, such as email. Email is the primary gateway for business users to send and receive critical business information, and it's where many users spend the bulk of their day. Delivering an integrated user experience between email and SharePoint enables users to focus on getting their work done, rather than getting distracted switching back and forth between email and multiple browser windows.

With the release of Lotus Notes® 8 and Outlook® 2010, IBM and Microsoft have taken significant strides towards transforming email into collaboration consoles, offering out-of-the-box integrations with enterprise social networks, shared calendars, instant messaging, and web contents. However, email integration with SharePoint is either missing with Lotus Notes or incomplete with Outlook. According to Forrester Research, third party vendors are needed to deliver a viable SharePoint-based collaboration experience, since Microsoft itself is only going to get you partway there.<sup>2</sup> Harmon.ie software provides a critical component of IBM's and Microsoft's email platforms, offering full-featured access to SharePoint documents and email sharing capabilities from an easy-to-use email sidebar.

For Lotus Notes customers who have deployed SharePoint, Harmon.ie's harmon.ie for SharePoint - Notes Edition brings the document collaboration, email sharing, calendaring, and social networking capabilities of SharePoint into Lotus Notes. Users can easily search, access, and share documents and project emails that are otherwise locked in people's inboxes, thereby making them difficult to share or retrieve. They can also manage team events from their personal calendars and discover and build their enterprise social networks. harmon.ie also supports the implementation of IT governance and metadata capture as documents and email messages from Lotus Notes are published on the SharePoint server.<sup>3</sup>

Lotus customers who are considering a migration to Outlook and Exchange® can rest easy with harmon.ie, since it also supports Microsoft Outlook with the same document collaboration and email sharing experience as in Lotus Notes. User training following the email migration is therefore minimal.

To gauge effectiveness, enterprises can measure the impact that SharePoint-email integration has on user adoption using collaboration analytics. This structured approach involves defining and tracking metrics that quantify and document how people change their collaboration habits as they adopt SharePoint. Using such tools, Harmon.ie customers report a dramatic increase in SharePoint use for document collaboration and project management and a significant increase in the number of IT users that access SharePoint on a daily basis.

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<sup>1</sup> InfoTrends, Inc. "Gathering MOSS? Revealing SharePoint Opportunities and Costs", August 2009.

<sup>2</sup> Forrester Research, "Solving SharePoint Infrastructure Problem", April 2010. pg 2

<sup>3</sup> Details on harmon.ie features for end users and enterprise IT are available at:  
<http://harmon.ie/SharePointNotes/Enterprise/Features>

## SharePoint Adoption: Early Adopters vs. Typical Business Users

Adopting SharePoint requires individuals and groups to transition from their familiar ways of working together to the new world of collaborative workspaces. It's out with the old paradigm — inundating people with emails and document revisions — and in with the new — storing documents in a central repository and sending document links, eliminating version control problems.

For document collaboration, SharePoint offers a Web browser interface which requires users to switch contexts, creating a distraction from their current workflow. The inconvenience of switching between contexts and having to juggle multiple windows does not typically discourage computer-savvy users from embracing SharePoint. These early adopters, who tend to work in technically-focused departments, such as IT, software development, and engineering, are comfortable toggling between desktop and online applications, and they master SharePoint through trial and error. Many of these individuals play an instrumental role in getting SharePoint installed and then accessible within their workgroup. They are willing to invest the extra effort in dealing with the browser interface, because they can see real benefits, such as increasing the effectiveness of their work and reducing the time, cost, and energy spent working with others.

On the other hand, business users, unlike early adopters, tend to resist mandated changes in behavior when new technology and usage requirements are thrust upon them. According to InfoTrends, Inc., user adoption is the primary obstacle faced in expanding SharePoint use.<sup>4</sup> Whereas tech-savvy users see the benefits gained from using SharePoint, business users see a new series of complex, time-consuming steps replacing what used to be simple activities, such as sending a quick email to share a document or holding a conversation about a project. They are not enamored with the technology, and they are less willing to put up with the frustrations of learning to use SharePoint. They do not want to deal with the frequent context switches and multi-step process of accessing or publishing documents on SharePoint via a Web browser. They just want to get their jobs done, without having to switch to a browser interface. Notes users, in particular, experience acute pain when embracing SharePoint, due to the lack of even basic integration between Lotus Notes and SharePoint.

## Transforming Email into a Collaboration Console

A better approach to encouraging SharePoint adoption among business users is to make SharePoint easy to access and easy to use, by integrating SharePoint into their desktop environment, specifically their email client. Email has been the dominant tool for communication and document collaboration for business users for the past 15 years and it will remain so for the foreseeable future. By integrating SharePoint with the user's email client and delivering a cohesive experience, the user adoption challenge is transformed from a divisive "either/or" approach to an inclusive "both." The integration allows users to easily publish documents and emails to SharePoint directly from their day-to-day environment, extending the interface metaphors they have become accustomed to — such as using drag-and-drop capabilities to publish messages and attachments in folders. As a result, organizations gain the effectiveness and efficiency benefits of using SharePoint to support

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<sup>4</sup> *ibid*, Pg 45.

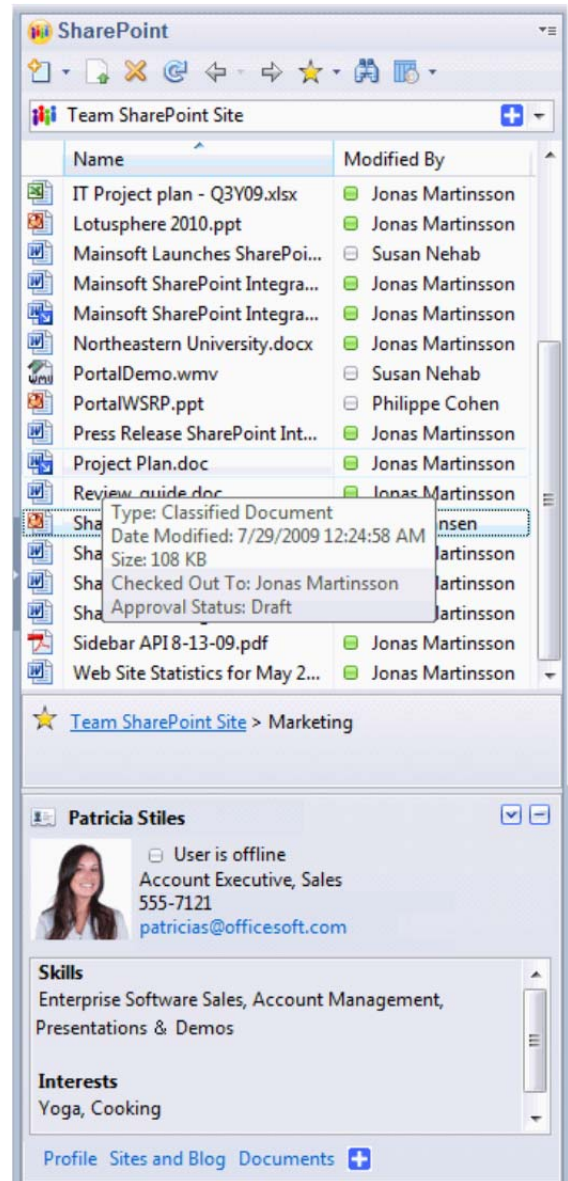
collaborative work, as well as access to business-critical emails within the project context, without demanding considerable changes in user behavior.

Since SharePoint integration is either missing from Lotus Notes or incomplete with Microsoft Outlook, companies turn to third party vendors such as Harmon.ie to provide advanced integration capabilities, such as the drag-and-drop filing of documents and email messages.

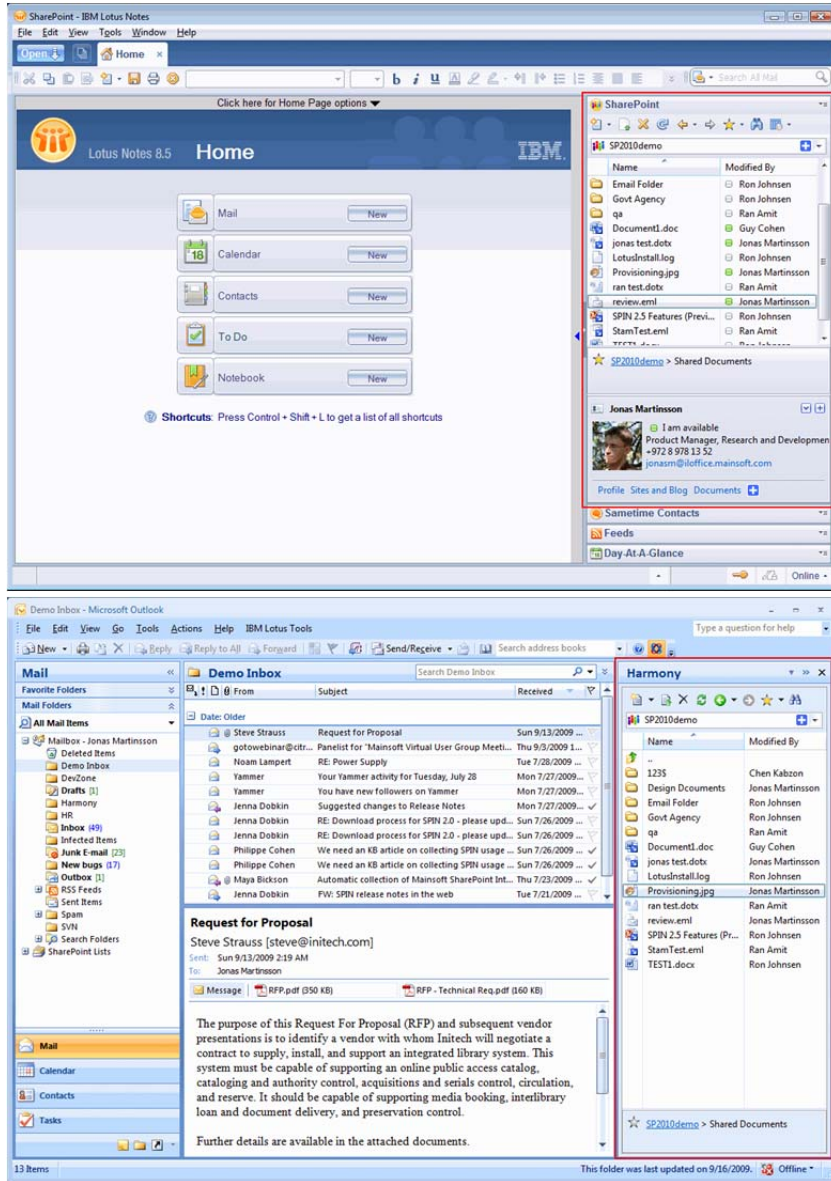
harmon.ie is a SharePoint sidebar that drives collaboration and SharePoint adoption by transforming Lotus Notes and Outlook into a collaboration console. Both editions provide full-featured access to documents on SharePoint, enabling users to easily search, access, and share documents and project emails that are otherwise lost in people's inboxes. harmon.ie also gives Lotus Notes users many of the same features that Microsoft builds into its 2010 software suite, including integrated access to team calendars and enterprise social networks.

Delivering the exact same document collaboration experience for Lotus Notes and Outlook enables enterprises migrating from Notes to Outlook to decouple their SharePoint adoption project from the complex migration. Initially, IT organizations can promote SharePoint adoption by integrating SharePoint and Lotus Notes. As Outlook and Exchange are being rolled out, users can switch to Harmon.ie's SharePoint sidebar for Outlook, which offers the same document- and email-sharing capabilities within Outlook as in Lotus Notes.

harmon.ie is built on the Eclipse™ Rich Client Platform (RCP) plug-in architecture to leverage Notes extension points and SharePoint's well-documented SOAP Web services — the same interfaces used by Office® applications, such as Word®, Excel®, PowerPoint® and Outlook. The Web Services interface enables Harmon.ie to deliver sustainable integration between the Email client and SharePoint.



*Figure 1*  
Full featured access to documents on SharePoint and SharePoint-based enterprise social networks from within Lotus Notes



*Figure 2*  
 Document collaboration in Lotus Notes and Outlook is the same using Harmonie software.

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**Figure 3**  
 Well documented SOAP Web services connect SharePoint with Microsoft applications and Harmon.ie's connector.

# Measuring SharePoint User Adoption: Collaboration Analytics

Collaboration managers are charged with driving SharePoint adoption among business users. In this role, they are challenged by how to gauge the progress and impact of their adoption strategies. How do they know whether individuals and groups are adopting SharePoint? How can they gain insight into whether SharePoint is actually increasing effectiveness and efficiency, or if it's merely a costly alternative to email and file sharing? Can IT-centric measures—such as SharePoint disk space utilization—be used as a proxy for user adoption? How can the many soft benefits afforded by SharePoint be incorporated into an overall analysis of the benefits of using SharePoint for document collaboration versus alternative solutions?

Collaboration analytics provide tools to address these questions. A structured deployment approach using analytics enables companies to monitor and measure user adoption of SharePoint and interpret the business impacts that result from changes in people's collaboration habits. It focuses on activities that involve collaboration between workers and tracks a variety of metrics that provide insights into how SharePoint is enhancing collaboration effectiveness and efficiency. Collaboration analytics can be used on a short-term basis to evaluate the effectiveness of specific user-adoption strategies, such as integration with email, as well as on an ongoing basis for evaluating the continued business impact that SharePoint brings to the organization.

## Basic SharePoint collaboration metrics include:

- The number of people using SharePoint, which should trend upwards over time.
- The frequency with which people use SharePoint, which should also trend upwards.
- The number of documents and emails stored in SharePoint for team projects, which should increase as people become more familiar with SharePoint.
- The number of documents attached to email messages, which should trend downwards as people send links in place of attachments.
- The number of team events being managed in a SharePoint team calendar, which should trend upwards.

In addition to an increase in SharePoint collaboration metrics, organizations can monitor the decrease in email volume. Specifically, enterprises can measure the decrease in email attachments being sent to multiple people, along with a corresponding increase in the number of document links.

These metrics require gathering data from both the email system and SharePoint.<sup>5</sup> The different data points can then be normalized and broken down by line of business and by geography. This analysis enables the collaboration manager to draw informed conclusions about the level of SharePoint adoption in specific lines of business and geographies and to define programs, such as tailored training, to improve user adoption in these departments.

Using such methodologies, Harmon.ie customers report an average 200-300 percent increase in SharePoint use for document collaboration and a significant increase in the number of IT users that access SharePoint on a daily basis. Customers also report that when users can access SharePoint events from Lotus Notes, sixty percent of them adopt team calendars.

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<sup>5</sup> harmon.ie can be configured to create a special log file of all relevant collaborative activities. The usage reports are Excel-readable CSV files, privately stored on the client. The reports can be submitted manually or automatically to a designated collaboration analyst, depending on selected settings. Documenting SharePoint collaboration activities provides an easy way to quantify, analyze, and monitor SharePoint use when it's accessed from the email client.

## Summary

Business users of SharePoint are less inclined to adopt SharePoint than IT and technically savvy end users, if they are required to interact with SharePoint via its web browser interface. By integrating SharePoint into the current work environment, such as email, collaboration managers are able to effectively promote SharePoint adoption among business users. Harmon.ie's SharePoint integration software supports this integration for both Lotus Notes and Outlook. A carefully crafted and executed rollout program gives your firm the ability to assess and quantify the actual impact of integrating SharePoint with email. Harmon.ie can help you define the metrics for analyzing collaboration at your firm, as well as help you measure the business results.

## About Harmon.ie

harmon.ie (pronounced 'harmony') brings document collaboration to every business user by transforming the email client into a collaboration and social workspace, called 'social email.' Thousands of businesses already use harmon.ie to vastly increase user adoption of Microsoft SharePoint or Google Docs for document sharing, collaboration, and social networking. harmon.ie is the newest product line from Harmon.ie, which has been building cross-platform enterprise software since 1993. To learn more about harmon.ie, visit [www.harmon.ie](http://www.harmon.ie).

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