

➤ No doubt about it, SharePoint is wildly popular. In fact, it's the fastest growing product in Microsoft history, and has enjoyed enormous adoption rates in businesses large and small since the release of SharePoint Portal Server 2003. The current version, Microsoft Office SharePoint Server (MOSS) 2007, has only increased the appeal.

It's reasonable to assume that with so many deployments across so many different types of organizations over the past five years that there would be some valuable "lessons learned." There are, and plenty of them, but perhaps none more important than this: **SharePoint is complex, and requires careful planning in order to provide a positive return on investment.**

SharePoint isn't complex to use, and not even (generally) complex to install. But when it comes to designing and configuring a SharePoint architecture to meet your collaboration, document management, records management, security, legal, enterprise search, electronic forms, workflow automation, external system integration, custom development, backup, replication, branding, capacity and performance requirements, rigorous planning is critical.

SharePoint can serve in all of these roles, and assuming that an implementation will be limited to one or two of them is a relatively common and expensive mistake, and sadly not realized until months after deployment.

And, in all but rare instances, the planning must be done up front. As many organizations have unfortunately discovered, simply "installing" SharePoint today and worrying about planning "later" leads to expensive, and often disastrous results. For example, an Information Architecture cannot reasonably be "added" after 500GB of documents have already been uploaded. In the best cases, the system requires a top-to-bottom redesign in order to return value on the investment. In the worst cases security is breached, the solution stops functioning or data is lost.

*"With the introduction of MOSS 2007, Microsoft moved SharePoint well beyond its traditional roots in portal and collaboration. SharePoint now includes broad, robust middle-ware capabilities. Achieving business value with SharePoint investment requires methodical, strategic planning to minimize risk and maximize potential benefits."*

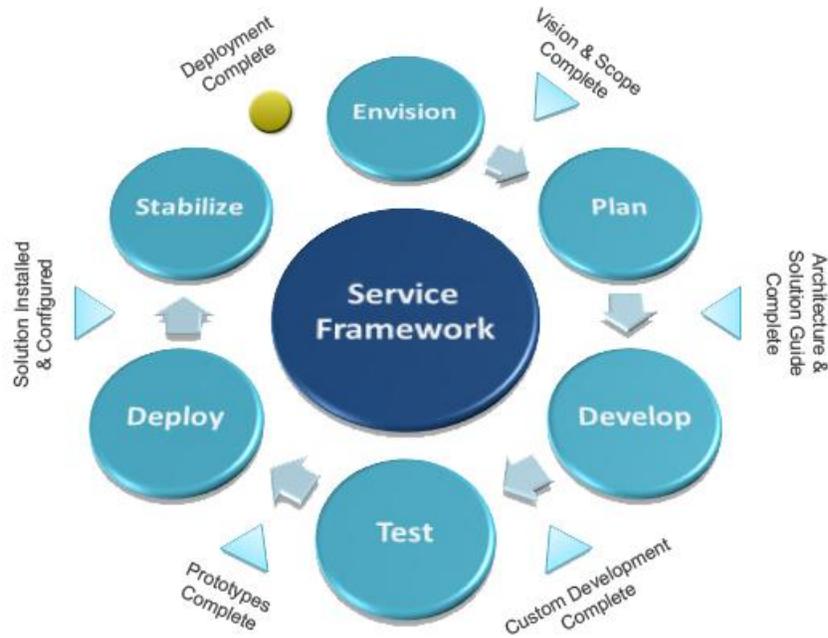
*Forrester  
The Critical Role of SharePoint  
Information Architecture*

*"Our lesson on the importance of SharePoint deployment planning came with a price tag of \$100K, the cost to redesign our site architecture and migrate content to the new environment. Had we effectively planned from the beginning, we could have spent that money adding new features that impact the business value to our clients."*

*- Katie Omri, Project Manager  
Hutchinson Cancer Research Center*

SharePoint is unlike most applications managed by IT departments in terms of its scope and focus. It's a system that wears many different hats: web portal, collaboration platform, business automation, business intelligence, enterprise search, content management, etc. Each of those areas has historically been a specialized IT discipline all unto itself, but with SharePoint it's all "under one roof."

Recognizing this, our approach to delivering world-class SharePoint solutions is based upon a tried-and-true phase-based methodology. We utilize a modified version of the Microsoft Solutions Framework that has been specifically tailored to deliver successful, high-ROI SharePoint systems time after time, with definable and measurable milestones.



SharePoint Delivery Model

## ENVISION

The primary purpose of the Envisioning Phase is to work with our clients to understand their business requirements. Our architects will facilitate discussions around the ways specific products, configurations and techniques would best align with those needs, and work with them to determine the appropriate scope of the project.



### Vision & Scope Complete

Agreement on the long-range vision as well as the short-range scope of what will be accomplished within the current project. Through this document, the opportunities, risks and assumptions are shared and understood among the team members.

## PLAN

In the Planning Phase, we take the high-level goals identified during the Envisioning Phase and design concrete steps to guide the project through execution to deployment. The Project Plan created at the beginning of this phase helps to manage time, cost, and resources such that our solutions can be delivered on-time and on-budget.



### Architecture & Solution Guide Complete

The finalized solution architecture reflecting the chosen features, requirements and priorities has been completed, submitted and approved.

## DEVELOP

The actions taken during the Development Phase may be different depending upon the client needs. Perhaps custom code development is necessary, or perhaps advanced out-of-the box configuration techniques are all that's required to meet the solution requirements. In either case, the development of this functionality is an integral part of our formal delivery process.



### Custom Development Complete

To the extent that it is necessary or appropriate, any custom development required prior to release has been completed. Not all solutions require custom development.

## TEST

The Testing Phase allows for any custom functionality, whether code-based or out-of-the-box, to be thoroughly evaluated prior to deployment to ensure that it not only meets our client's expectation in terms of functionality and usability, but also that it has no negative impact on overall system performance and supportability.



### Prototypes Complete

If any custom development was necessary to meet solution requirements, the resulting prototype(s) have been completed and tested to work within the solution.

## DEPLOY

During the Deployment Phase our expert consultants install and configure the designed solution. Our deep network, storage and infrastructure experience allows us to move very quickly, minimizing the time to deployment and eliminating configuration errors.



### Solution Installed & Configured

The solution has been installed and configured in accordance with the design architecture, industry and Microsoft "best practices" and the corresponding Solution Guide.

## STABILIZE

The Stabilization Phase is the "test drive" – we work with you to develop and execute use cases to verify that the solution as deployed performs as expected. Trilogy Solutions will not leave you with a system that merely "should work", but rather with a system that's been demonstrated in a live production environment to your satisfaction.



### Deployment Complete

The solution has been validated to work within the production environment, demonstrated that it has met the design criteria, and has been accepted by the client.