



5 PITFALLS TO AVOID WHEN MOBILIZING SHAREPOINT



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Believing that Responsive Design is the Complete Solution for Mobile UX

There are a myriad of mobile use cases and if you're using SharePoint and/or Office 365 as your content repository, it makes a whole lot of sense to leverage it for your mobile workers.

Some organizations invest in moving their SharePoint/Office 365 sites to a responsive design in order to support different types of mobile devices. The idea isn't terrible. Responsive web design ensures that your SharePoint sites will resize or change orientation automatically based on the device used. It does provide some improvement in the user experience but it's far from the panacea.

Let's consider the business scenarios you're aiming to address. Here are some questions you might ask:

- What tasks are your users expected to perform on their device? Upload technical inspection photos to SharePoint? Consume brochures stored on OneDrive? Fill out and submit expense report forms?
- Do your users spend most of their day in Outlook to collaborate and conduct business?
- Are they frequently working offline?

Responsive web design means replicating the desktop workflow onto mobile devices with a marginal improvement to how the information is presented. A better solution would provide an experience that's tailored to the device and task at hand. If users are often offline, they need easy offline access. If they're on an iPad, the experience of accessing SharePoint content should be what one would expect on an iPad.

"Mobility is not only about moving to a responsive design, expecting users to access their key business activities through their mobile devices, and yet this is the approach most businesses follow - taking whatever it is that is done on the desktop, and making it accessible through mobile devices. Approaching mobility from a UX perspective is about re-thinking the mobile experience from top to bottom, developing applications, tools, and content specifically for those mobile scenarios.

A great example is Colligo, who were the first company to develop native SharePoint solutions for iOS and Windows devices to allow users to view, edit, and sync content between their devices and SharePoint environment, rather than go through the browser experience. Colligo has done the hard work of thinking through the common activities of mobile SharePoint users, and has designed experiences specifically for those users. And that's the whole point of good UX design."

– Christian Buckley, Office 365 MVP

When trying to understand the business scenarios of your mobile users, there's an obvious question that's sometimes overlooked: Are your mobile users mostly working through Wi-Fi or are they often 'off-grid' at project sites or on airplanes, for example?

Let's think about the implications of connectivity for your mobile workers. Imagine a business consultant who's regularly flying out to meet customers. This consultant might have documents in SharePoint on-prem and perhaps also on OneDrive and Office 365 sites. Before she flies out, she has to go to each content repository, pre-select files and documents she thinks she'll need, then download the content locally (check-out). This consultant might take photos or edit documents that will then need to be saved back to the appropriate repository when reconnected. Not exactly a smooth process. What's the likelihood that this consultant will use SharePoint consistently for saving and sharing her documents?

Now imagine a different solution for this consultant - one where she would always have access to relevant content when offline, without having to pre-select it. A solution in which metadata would be extracted automatically for easy searching and records management and where sync conflicts would be resolved efficiently.

Some SharePoint mobility solutions may be built for a mobile device but their core functionality fails to recognize the use case and work context.

“When a company asks mobile users to go through hoops to just get to the files they need, it's pretty clear that the poor user experience will lead to workarounds and compliance issues. Mobile users aren't one and the same and each of their needs must be examined separately to ensure that the right solution is implemented. I think the industry is beginning to acknowledge that there's much more to mobility than the device itself.”

– Ben Henderson, Senior Product Manager at Colligo

Many apps and websites have an aesthetically pleasant UI (User Interface) but a poor UX (User Experience). The “look and feel” is important but not enough to keep your users engaged. A compelling user experience is one of the most important factors in driving user adoption. Why do employees go off to Dropbox or Google Drive for sharing documents when their company has invested so heavily in SharePoint? Because it’s easier, faster. Because it provides a better *experience*.

So what does mobile UX mean? It often involves streamlining a process to achieve simplicity with complex operations, given the smaller form factors and screens of mobile devices. Tasks on mobile devices are typically designed for functions requiring rapid turnaround or that can be performed quickly given the propensity for interruptions.

The transportability of mobile devices lends itself to an obvious role of taking documents into the field, but this demands working within the limitations of devices in terms of storage space and connectivity. These requirements call for simple user workflows to select which documents should be available offline, keeping those documents up-to-date, and finding the necessary information quickly when it is needed. Additionally, users need visibility into when information on the device has gone stale, or when their devices are approaching their limitation thresholds.

“When and why a user chooses their phone or tablet over opening up a laptop impacts the requirements of the software as a tool to accomplish their goals. These goals in mobile content management are as diverse as the roles of workers in the enterprise with further nuance expanded by industry-specific needs.

At Colligo we are designing the user experience on mobile devices to support business processes without getting in the way. In our ideal scenario, the tool becomes a transparent part of the operation and users feel they are working with the information directly. To that end, we leverage the SharePoint platform and the strengths and capabilities of mobile devices to provide software that allows the fluid performance of daily operations anywhere the user needs to access their information. And we also empower administrators to push out relevant content to users in order to further simplify the user experience.”

– Jack Stockholm, User Experience Manager at Colligo

Relying on MDM Alone to Balance Security and Usability

Most SharePoint projects require high user adoption to claim success, however this goal can be hard to achieve. Often the culprit is the degraded user experience caused by a heavy-handed approach to controls and restrictions imposed to satisfy governance and security requirements.

Some examples include:

- **Management of legal risk**, including controls to prevent data leakage. Tight restrictions on how information can be accessed and shared can lead to an awkward UX.
- **Encryption and authentication technologies** that oblige users to remember multiple passwords and periodically re-authenticate.
- **Regulatory compliance** which places the burden on end users to apply metadata to content being stored and restricts where it can be stored.

Many organizations make the mistake of believing that an MDM (Mobile Device Management) solution alone can solve these problems. While this is part of the solution, it does not address the demands of end users for a sophisticated UX. For example, most MDM vendors offer applications that can access SharePoint in a rudimentary way, but lack advanced features that are available from vendors that specialize in SharePoint UX. As well, utilizing only apps from the MDM vendor can restrict the breadth of enterprise systems that can be supported by mobile tools, since a single vendor offers only a limited choice.

The solution is to pick a best-in-class mobile SharePoint app platform that is compatible with the MDM chosen by the enterprise. SharePoint apps can also support access to several enterprise systems within the same UI, enabling users to easily move content for one system to another. As long as the app is compatible with the enterprises chosen MDM, the solution can be highly secure while delighting end users.

SharePoint app platforms can also support security and compliance through their own cloud deployment services. These services are transparent to end users, but can provide rich capabilities to manage and monitor compliance.

“Enterprise mobility is not just technology, but a comprehensive program spanning people, processes, and technology. Likewise, data security controls can’t be applied just to the device; they must also be applied to applications, data, network, people and processes through an integrated security governance program. Furthermore, when device security, network security, and app security are not properly aligned and coordinated, they will all come ‘crashing down’ on the user experience.”

– KPMG, “A framework for Responsibly Mobile”, 2015

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Not Looking to SharePoint Partners to Fill Mobility Gaps

As organizations address their evolving document management requirements – for example, transitioning to the cloud with Office 365, making SharePoint more accessible to mobile users or controlling use of unsanctioned cloud file repositories – there's sometimes a misconception that Microsoft is the one-stop-shop for all things SharePoint.

When organizations utilize SharePoint as a platform on which to build a new business process, the user experience is sometimes poor but that's often because the out-of-the-box UX wasn't designed to support the process.

The reality is that Microsoft works closely with a number of vendors to provide process and scenario-specific solutions to complement out-of-the-box SharePoint/Office 365.

“Often people can get tripped up thinking that everything is going to come from Microsoft. It’s really important is to step back from just looking at SharePoint and Office 365 and understand that Microsoft has always been an ecosystem. What they provide in the box is really to get you started – your storage, container – but there’s a rich ecosystem and Microsoft does rely on partners like Colligo to help you in completing your solution.

My recommendation is to understand those trends and the Microsoft roadmap and not forget about the partners. It takes the whole family to address all those SharePoint gaps.”

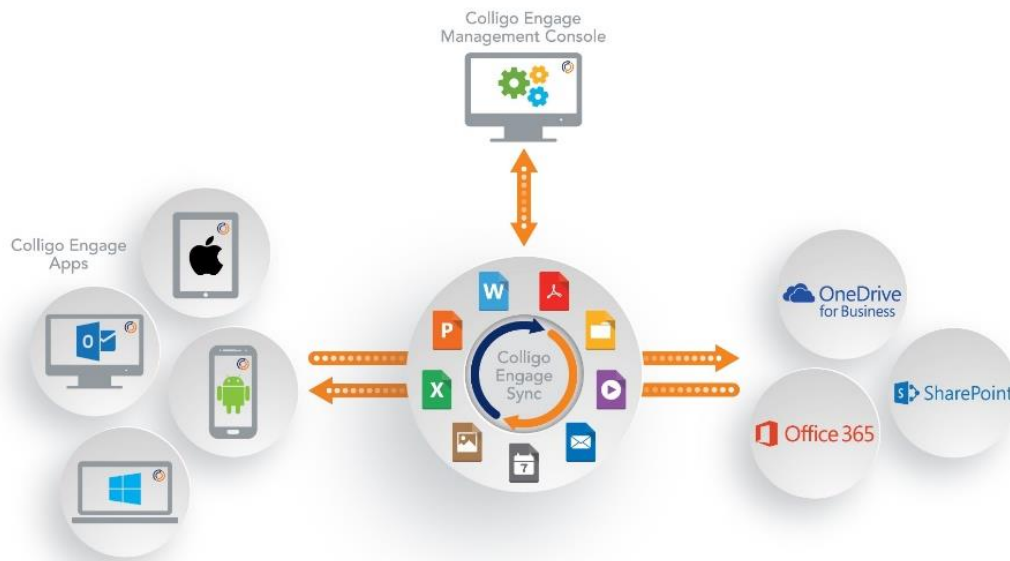
– Joel Oleson, Top SharePoint Blogger



Colligo helps organizations accelerate SharePoint/Office 365 adoption for content filing and sharing.

Our Colligo Engage platform includes highly engaging 'native' apps, multi-system sync technology and a management console.

Colligo solutions are deployed in over 5,000 companies to increase productivity, support mobility and mitigate risk.



Next Steps

You've invested time and money to deploy SharePoint. Now is the time to fully leverage your system for your mobile users. Take this opportunity to do it right!

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