

**IA****Case Study**

# SharePoint is Smokin' at Global Tobacco Company

## **Information Architected SharePoint Case Study**

Leading global tobacco conglomerate shares how it replaced a complex ECM system that failed with a successful SharePoint deployment.

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# SharePoint is Smokin' at Global Tobacco Company

## Company Background

Japan Tobacco International (JTI), a Global 500 company, is the world's third largest international tobacco business, with offices around the world. The group was formed in 1999 when Japan Tobacco Inc. purchased the international tobacco operations of the US multinational R.J. Reynolds, and grew in 2007 when JTI acquired Gallaher.

JTI employs 23,000 people in 40 offices and 30 factories and R&D. Its brands are sold in over 120 countries. In 2007, JTI sold 385 billion cigarettes, generating USD \$8 billion in net sales. For the seventh consecutive year, JTI maintained its status as the fastest organically growing business in the tobacco industry.

## Project Background

### SharePoint Tried and Abandoned – 2001 and 2003

JTI first became involved with SharePoint in 2001, using Windows SharePoint Server (WSS) 2001 as a simple document repository. At that time they found the product immature and abandoned it. They again attempted deployment with WSS 2003, but felt the product was still immature.

### Enter “Big Bang” Records Project

In the interim, in 2005, a need for an Enterprise Records Management (ERM) program in JTI. SharePoint was not considered (seriously) for this initiative, because of past experience and an understanding that SharePoint did not offer suitable records management functionality. After a needs assessment and RFP process, JTI selected EMC Documentum for its ERM system. The deployment included the enterprise content management (ECM) functionality (Documentum) as well. As a result, at this point, all focus on MOSS/SharePoint within JTI stopped. All energies were focused on ECM Documentum.

### PoC - Failed

A “Proof of Concept” (PoC) project, described as a “big bang” approach to ECM with a focus on RM was developed. The project attempted to implement RM and ECM across the enterprise, all at once, using EMC Documentum. It failed.

## Five Facets of Failure

1. Lack of maturity of the RM technology (lack of support for MoREQ)
2. Lack of maturity among the Documentum service providers – there was no substantial experience with RM and support of MoREQ
3. Lack of RM experience within JTI itself
4. Lack of integration between the ECM and RM modules (integrating the
  - Documentum components became a project much bigger than expected in time and cost)
5. Lack of business sponsorship, which led to a lack of clear governance and guiding policy

## MOSS Grows in JTI

The failure with the “big bang” ECM/RM project caused IT to rethink its strategy and approach to providing content management-like functionality to the organization. As a result they re-focused their strategy and direction on “quick wins”, short and targeted applications that were manageable, realistic in scope and immediately addressing a well-defined business need. With this re-focusing came a fresh look at SharePoint. JTI IT hoped that SharePoint had matured in the interim. It had.

At this point JTI began looking at MOSS 2007 Enterprise.

## A Move to MOSS Poses Many Challenges

Challenges with a move to SharePoint surfaced almost instantaneously. As part of the move “back” to SharePoint, IT found themselves faced with a substantial content migration issue.

As part of the former Documentum project, approximately 15 – 20 GB of critical, valuable legal/quasi-legal business content in the form of PDF and Office files, had been ported to the Documentum system. One of the shortcomings of the EMC Documentum system for JTI was the proprietary nature of the product and the way it stored content. In order to establish a SharePoint environment, JTI had to migrate the “Documentum content” back into a Microsoft environment. Unfortunately they found that there was no easy way to do this. Neither Microsoft nor third parties provided content migration wizards or appliances.

So JTI IT developed a migration mechanism in Microsoft .NET that they called “MOSS Feed.” Using MOSS feed the 15-20 GB of content were exported from Documentum into Windows, and then imported into SharePoint. This proved to be a formidable task that could not be taken too lightly. The process had to take not just the content, but, in order to save many man hours of re-work re-constructing the organizational elements that surround the content, the process had to migrate associated metadata, folders and security schemes as well. Moreover, because the content being migrated was critical business content of a legal/quasi-legal nature, not only did the integrity of the content have to be carefully preserved, but the process used also had to be auditable.

***Lesson Learned:***

*Do not underestimate the time, money and effort required for content migration. It's not just the content, but the metadata, folder structure and security schemes as well.*

The process was not only a success in migration, but proved to be worth the time and effort. With content properly within SharePoint (MOSS 2007 Enterprise), IT had a platform on which they could begin to implement their “quick wins” strategy. The agility of SharePoint, especially compared to the heavy-handedness of Documentum, allowed IT to far more quickly and nimbly offer business applications built around content.

It must be appreciated that records management and compliance were no longer a focal point for IT. Rather, IT and JTI were looking for more easily defined business issues that had a strong content management component that could be addressed directly and quickly.

Instead of trying to solve organizational-wide issues, IT looked for tactical business issues that had an existing business sponsor and a well-defined need. Although records and compliance were still relevant components of an ECM strategy, requirements were “relaxed” with a renewed focus on getting documents managed first (as opposed to officially declaring them as records), and subsequently deriving greater value from the content through collaboration. The JTI IT group saw the ability to do just this as a basic strength of SharePoint.

**Lesson Learned:**

*Start SharePoint (or any ECM application) with a well-defined business strategy first. Technology does not define basic business issues or provide a turnkey solution to them; it gives you tools to solve them. Start by identifying a business sponsor that has a well-defined issue that can be addressed head-on. Look for the quick wins with targeted business benefits. and security schemes as well.*

While leveraging SharePoint to solve business issues was an IT driven initiative within JTI, IT did not drive adoption per se. Rather they “shopped” the capability to business practice leaders and allowed business sponsors who understood the value proposition to drive adoption. This was the antithesis of the “big bang” approach IT tried with records management. Business definition of the solution was fundamental to their newly defined “quick wins” strategy. IT did manage expectations, however, which allowed them to indeed deliver “quick wins”. In positioning SharePoint, rather than selling an exhaustive list of all it could be made to do, IT focused on what it saw as the strength of SharePoint – collaboration. By focusing the business users on that specific functionality, IT knew it could deliver a quick win because collaboration is a core functionality of SharePoint and required little to no customization from IT.

**Perfect Timing**

Timing was perfect, as at the same time, JTI acquired another enterprise. Suddenly JTI business managers had a well-defined need to merge content and processes across two organizations. In a 1-2 month time period, IT provided 40 SharePoint sites that allowed the business to do just that. These 40 sites facilitated collaboration and content sharing across various teams and projects between the two companies. Business identified the need and defined the approach to collaboration and workgroups, while IT supported that need in the form of SharePoint. IT met the business need in a timely fashion. It was a win – a big win.

As a result, IT, began to further “shop” its SharePoint capabilities via an online e-learning tool. But IT kept true to their strategy or business driven organic adoption of SharePoint. They avoided the temptation to leverage their “big win” into another “big bang” project. IT specifically did not overemphasize the win they had had in supporting the merger and the 40 related SharePoint sites.

## Seeding Awareness

IT leveraged an e-learning platform that allowed business users to discover and learn about SharePoint at their own pace. This approach not only best served the business user, however, but also IT. Realizing it had limited resources, IT did not want to create a run on the department with virtually everyone clamoring at the same time for a SharePoint solution. So they enabled organic growth through user demand-driven training and exposure. The education was also a low-cost approach to marketing and training. This was another key element to the IT SharePoint strategy. This approach to internal marketing provided a natural and manageable adoption rate, but also supported adoption in a “just-in-time” (JIT) manner as well. IT avoided creating a bottleneck by limiting exposure to SharePoint to their own face-to-face training and specific marketing. This organic approach worked well, very well, for JTI.

## Educated Sponsors

As a result, JTI business users came to IT with a “standard and realistic” expectation of what SharePoint could and could not do for them. With that foundation underlying the request for a SharePoint application, IT asked the business users to define the rules, processes and governance it required from the project. Because it was the educated sponsor that came to IT, It found that the answers to these questions were readily available as the business user had already thought through the process or application they wanted to target.

### ***Lesson Learned:***

*Work with a business partner that has a realistic expectation for what SharePoint can do, and is ready with the associated process, governance, and deployment strategy defined. IT cannot make up for lack of that.*

That said, it needs to be appreciated that this also strategy worked because of the technical strategy behind it, in the form of SharePoint. JTI IT believes that what they have in SharePoint is not necessarily a total solution, but a solid platform on which to build any number of solutions, with agility.

IT has found that SharePoint provides a solid backend (i.e., a single content repository) and front end (i.e., a flexible portal interface). Armed with this basic toolset, JTI IT is at

the ready and adept in complementing the basic SharePoint architecture with additional, 3rd party components. Similar to the education they gave their potential users, JTI IT positioned SharePoint with realistic expectations. They have clearly established what it represents and the approach to leveraging by augmenting SharePoint as needed.

### **The JTI Business App Startup Process**

Today, when a JTI business sponsor approaches IT with a potential SharePoint application, IT executes a needs assessment. If they detect a need for functionality beyond the basic SharePoint collaboration, an RFP is quickly developed, administered, and a solution component is selected and integrated into the JTI SharePoint architecture. The approach has served not only IT well, but also all JTI well for several years now. Similar to the organic approach to SharePoint adoption, using this approach, an ECM strategy has emerged within JTI. The core of this strategy is SharePoint, providing the centralized approach to content tagging, organization and management. As needed, additional functionality is bolted onto the foundation, using a repeatable, standard approach. The result is exposed via the SharePoint interface.

### **Augmenting SharePoint Server**

To date JTI has augmented the SharePoint platform with workflow functionality from Nintex and content synchronization to support mobile users from Infonic (aka "Iora"). A complementary records management component currently being selected. At the time of this writing, JTI IT felt that they would go with deploy Meridio Records Management from Autonomy.

While JTI stressed that overall the integration was "simple" it was not trivial.

Consider that 40-50% of the JTI SharePoint users are mobile. Although support for replication and synchronization was seriously lacking in SharePoint, integration with Infonic filled that gap. This capability was not seen as a shortcoming of SharePoint, but rather a strength that the ability to integrate this functionality was relatively straightforward.

In the opinion of JTI IT, SharePoint nonetheless does its job well. It serves as the foundation to their ECM architecture and supports the integration they have required thus far.



## **Embrace and Extend**

What has made this strategy successful is standardization and agreement on the role and purpose of SharePoint, and the approach to expand beyond that. As stated, from the outset, JTI IT agreed to exclusively focus on the collaboration, content management and portal front end of SharePoint. Implied in this was also an agreement to not use other functionality within SharePoint, because it was not deemed adequate, but rather to look for a suitable SharePoint complement.

JTI IT understands that Microsoft will often make claims to have functionality such as workflow, and records management for example, that are, frankly, not what they claim to be. IT did its research and determined that these were more of a marketing placeholder than workable functionality. Thus such functions were slated for incorporation through integration, as dictated by business need.

## **Workflow**

For example, when workflow emerged as a need, IT investigated the promises of the Windows WF foundation in MOSS. While they found that there was no theoretical limit to the workflow functionality and capabilities in this toolset, it was far too costly in time and resources (and thus associated costs) when compared to “real” workflow systems. Creation of workflows was not straightforward and simple. That is when they executed their RFP and selected Nintex as a replacement for workflow capabilities within SharePoint.

## **Records Management**

The same was true of Records Management. In this case, JTI already had a bit of experience with records management, from the former “big bang project,” and knew that SharePoint lacked critical records management functionality.

## **Enterprise Search**

Recently enterprise search has emerged as a need for SharePoint users. Again, JT IT quickly determined SharePoint search did not meet their needs and embarked on a competitive acquisition process. They honed in on Autonomy and FAST as the likely alternatives.

At the time of this writing there was a bit of a preference for FAST, predominately driven by the fact that Microsoft acquired FAST and the expectation. While FAST is separate and distinct from SharePoint, there is hope and speculation among JTI IT that Microsoft will soon provide “out of the box” integration between FAST and SharePoint,

at a much reduced cost. In fact, the JTI strategy includes recognition and hope that Microsoft will continue to mature SharePoint and add to its functionality through development and acquisition. The JTI approach to SharePoint deployment is agile and ready to replace any third party functionality with built-in Microsoft SharePoint functionality when it is available.

### **Beyond ECM**

The strategy for expanding the value of SharePoint via integration goes beyond adding functionality to SharePoint itself. As the core of the JTI ECM strategy, SharePoint is being integrated with other business applications as well. For example, there has been effort to integrate SharePoint with JTI's SAP system. The initial effort was done using the IView webpart, which enables the search and retrieval of SAP data from within the SharePoint application. JTI IT has abandoned this effort for now, as the functionality was "very poor." Fortunately this is not a pressing issue for JTI at this time. Microsoft is working with JTI IT at "better" ways to integrate SAP and SharePoint.

### **SharePoint as Front-end**

But whether its integration with a separate application or enhancement through complementary functionality, the SharePoint applications in each instance are rolled out via the SharePoint user portal interface. JTI sees this as a big asset to their success as well. "Although the SharePoint portal may not have all the sophistication and capability of a Plumtree Portal," they said, "it is much easier to deploy and easier to use."

Thus, like SharePoint itself, the portal front-end becomes a tool that provides a quick win for IT, and quick adoption for users, without limiting the user experience. The flexibility of the portal interface provides JTI users a fair amount of control over their application interface. Thus the users feel deployment is user-centric, not IT dictated.

### **Wherefore Art Thou Templates?**

Perhaps the only negative side to the SharePoint integration experience has been a lack of templates. Although Microsoft makes templates available, JTI found that far too few are available. They are hoping that Microsoft and its partners will provide more templates to help expedite application deployments quickly, obsolescing the need for IS to build customized solutions.

“As far as SharePoint goes, we are in, we are all in. It’s just a matter of how much investment we can make at one time. How much behavior change can we expect to take place over time.”

IT foresees SharePoint someday replacing the LAN, Domino, and the corporate Intranet, but this is a long-term strategy.

## **SUMMARY and RECOMMENDATIONS**

JTI now supports 152 SharePoint sites, used by approximately 4,000 JTI knowledge workers, about 25% of the 16,000 knowledge workers throughout the organization. (Note: JTI employs 23,000 individuals in total globally)

While IT is high on SharePoint, they believe that user satisfaction with SharePoint is also high. Using a self-defined scale of 1-20, where 20 was defined as “the perfect solution”, user satisfaction with SharePoint applications within JTI was ranked a 17. The delays necessary to integrate the complementary technical components as part of system roll out was cited as the major reason for users not being totally satisfied. But both JTI IT and business users feel SharePoint has been a much better experience than the one they had EMC Documentum which in comparison was far more complex, and involved much more complicated and lengthier integration and customization efforts.

When asked what they like about SharePoint, the JTI IT staff stated that SharePoint is a great foundation and growth platform.

### **The Top Four Benefits**

1. The ability to react with speed and agility. It directly supports their “quick wins” strategy.
2. Compatibility with the overall JTI IT infrastructure, which is a Microsoft shop. Furthermore SharePoint is mature enough to be a Notes killer, and provides an approach to intelligent integration with Microsoft Office, web services and content services.
3. A simple yet robust approach to integration. The SharePoint product architecture at a basic content management level is stable and open enough to enable “clever” integration by IT. There is great faith and reliance on the underlying SharePoint architecture. It allows them to create a single repository for everything, but as other functionality is required, (e.g., web content management and records management) it can be bolted, easily, on top of that base.

4. The ability to leverage existing in-house Microsoft expertise. JTI IT has much experience with Microsoft products. They feel their Microsoft in-house experience and expertise facilitated the speed and ease with which they could “master” SharePoint.

### Closing Advice

When asked what advice they would give to would be SharePoint users JTI offered this: “We learned much from our mistakes, both the early attempts with SharePoint and the “big bang” Documentum project. Think big, but implement progressively. Generate quick wins but be sure to have good project management, governance policies and procedures in place.”

“Drive the strategy from a technical perspective with a solid architecture and platform, but allow business need and definition to determine the speed and direction of where you go next.”

“SharePoint proved to be a great way to educate knowledge workers on the power of ECM itself. The ability to quickly create a solution allows knowledge workers to experiment and grow. As their needs change, the basic application is enhanced. SharePoint is a great way to motivate business people to use ECM.”

JTI admits that SharePoint has limitations in content services, but feel this will only get better.

In the interim the SharePoint backend and front-end components are serving JTI well, and enable augmentation “easily” through integration on top of a sound platform architecture. They described this as a “Lego™” approach, to meeting the ECM needs of the business in a highly flexible and dynamic manner. There is great faith in the Microsoft SharePoint strategy and vision. “As SharePoint matures, so does our organization.”

## What is YOUR Information Architected for?

Whether you are using SharePoint, considering the use of SharePoint, or have a project actively tasked with improving your businesses operations through the capabilities of Enterprise Content Management, Information Architected can help.

Information Architected provides:

- Analysis - Through whitepapers and case studies
- Consulting - strategy development specifically designed to maximize the effectiveness and ROI of SharePoint in your organization
- Education - ranging from half-day strategy briefings to a multi-day SharePoint product assessment and review, strategy development and implementation guidelines

Information Architected develops customized strategies for SharePoint implementations and specifically provide assistance in conducting needs assessments, change management planning, and constructing the information architecture that properly supports your SharePoint goals and objectives.

Though no two SharePoint implementations will be exactly the same, there are critical best practices to implementation that should be followed.

Information Architected provides the guidance and methodologies necessary to ensure the success of your SharePoint initiative.

### Contact us:

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- Call: 617-933-2584

... to discuss your specific needs and what we can do to streamline your business' use of SharePoint.

**To learn more about our SharePoint services, go to:**

<http://www.informationarchitected.com/services/business-practices/sharepoint/>