SharePoint 2007 Fails the 7 Pillars Framework

Marketplace Opportunities for ISVs; Next Actions for Microsoft

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The information provided in this White Paper is by necessity of a general nature, and its applicability to a specific business or organizational context is not guaranteed. Due professional care must be exercised in applying the ideas within this White Paper. All care has been invested in the preparation of this material, but the author accepts no responsibility for its application.

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Executive Summary

This is an ideas paper. It documents our vision of what needs to happen with Microsoft SharePoint to make it a productive and effective place of work for teams in businesses and organizations. The ideas are written for those who can do something about covering over the gaping holes in the collaboration capabilities of SharePoint 2007—that being independent software vendors (ISVs) who work with Microsoft and Microsoft SharePoint 2007. This ideas paper should be read in the context of the aforementioned research, which is documented in *The 7 Pillars of IT-Enabled Team Productivity: The Microsoft SharePoint 2007 Analysis* (February 2008).

This White Paper is written for product strategists at Microsoft-aligned ISVs, and for the various Microsoft Product Groups that are working with SharePoint.

For each of the areas in the 7 Pillars collaboration framework that was used to analyze the capabilities of SharePoint 2007 to support team collaboration, ideas for ISVs to build complementary products and services are noted. In addition, strategic direction is given to the Microsoft Product Groups as to where they need to enhance the team collaboration capabilities of SharePoint.

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Introduction

This is an ideas paper. It documents our vision of what needs to happen with Microsoft SharePoint to make it a productive and effective place of work for teams in businesses and organizations. The ideas are written for those who can do something about covering over the gaping holes in the collaboration capabilities of SharePoint 2007—that being independent software vendors (ISVs) who work with Microsoft and Microsoft SharePoint 2007.

This ideas paper came about as a result of our recent CIO and IT Organization-facing research into the efficacy of SharePoint to support team collaboration. While working on that research, we developed a set of ideas as to where SharePoint needs to get better in order to meet the needs of collaborative teams. This paper documents all of those.

This ideas paper should be read in the context of the aforementioned research, which is documented in *The 7 Pillars of IT-Enabled Team Productivity: The Microsoft SharePoint 2007 Analysis* (February 2008). See co.michaelsampson.net/sp7p.html for ordering details.

The ideas presented in this paper are done so within the context of the 7 Pillars. Our earlier paper awarded a "Pass" or "Fail" grade to Microsoft for the capabilities in SharePoint 2007 in line with each Pillar, and this paper builds on that analysis and highlights the opportunities.

For each of the 7 Pillars, we have also noted our counsel and direction to Microsoft. It is important to have this material in this paper, because it shows the direction in which we believe Microsoft should point the SharePoint product roadmap. ISVs wanting to invest their time and effort in things that align with the SharePoint product roadmap are well-placed to reap the financial rewards of doing so in the years ahead, either through licensing revenue or a via an acquisition by Microsoft.

The ideas in this paper can be treated as validation for ideas that you already have, or they can be taken as a set of new ideas that can be turned into revenue-generating products or services. For each of the ideas in this paper, an ISV wanting to develop a product or service to address the opportunity will need to do a full analysis of the requirements. The Michael Sampson Company is well-placed to assist with this process.

Target Market

This research paper offers guidance to two constituencies:

- *ISVs Adding Value to SharePoint*. Microsoft has clearly positioned SharePoint as a platform for information management and collaboration within organizations, and thus there are vast opportunities for developers of add-on and complementary products to build products and services that address unmet market needs. This paper highlights key opportunities for products and services in the area of collaboration. The payoff to ISVs may be in selling directly into organizations that have embraced SharePoint (thus earning licensing revenue), or in becoming an acquisition target for Microsoft to round out missing features in SharePoint.

- *Microsoft Product Groups*. SharePoint is a much better product now than it was when first released, but there is still much left to be done in the area of collaboration. And these outstanding issues aren't merely tweaks around the edges, but are core and fundamental to the efficacy of SharePoint to meet the collaborative needs of teams. In highlighting these outstanding issues in the current edition of SharePoint, this paper seeks to call to the attention of various Microsoft Product Groups the areas that need greater development and inter-Product Group collaboration.

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Improving the Capability of Teams that Can't Be Together, To Work Together

Pillar 1. Shared Access to Team Data: Opportunities

The key conclusion of our 7 Pillars assessment of SharePoint 2007 is that SharePoint is, on its own merits, a Pillar 1 product. SharePoint 2007 earns a passing grade in two other Pillars once Microsoft Office Communications Server 2007 is added to the mix, but it still fails the needs of collaborative teams in 4 out of the 7 Pillars. However, although Microsoft SharePoint earns a passing grade in Pillar 1, opportunities for improvement abound.

Opportunities for ISVs

We see four key opportunities for ISVs to improve the Pillar 1 capabilities of SharePoint.

Correlating Items in a SharePoint Site

SharePoint needs a way of displaying the inter-relationships and correlation between items in a SharePoint site over time. For example, SharePoint treats a document library as a discrete element, and a task list as a discrete element, and it is not possible to link specific items between the two. Thus when you have a document and a set of next actions about that document, team members need to remember the presence of the tasks in the context of the document. When looking at the document in the document library, they need to carry a mental recollection that there are a set of related tasks. And when looking at the tasks, they need to remember which document they apply to. The correlation should be bi-directional, which makes the solution more than merely adding a lookup field to create a uni-directional link.

The same correlation is needed for meetings and events: what are the outputs from the various meetings and what is the current status of the next actions that were agreed for each of the meetings. You can do this in a Meeting Workspace, but those tasks are then tied solely to the Meeting Workspace and can not also be seen in the overall context of outstanding work for the members of the given site. There needs to be a better way of doing this.

SharePoint to Third-Party Collaboration Tool Bridge

Microsoft wants SharePoint to become the central place from where people do their work, but the reality is that many people will work with other people who are using different tools. Thus an individual will use SharePoint for the things that their organization is working on, but will have to use other tools when working on projects with external parties.

Organizations need a mechanism for bridging the artifacts in a SharePoint site with the artifacts in a Lotus Quickr site, in a 37signals Basecamp project site, and in the major team collaboration solutions. This means that the SharePoint user can do all of their work in SharePoint, and unbeknownst to them, many of the projects that they are working on are actually stored elsewhere. The bridge makes the linkage possibile. For example:

- There is a place to store documents in Lotus Quickr. Such a bridge would create a SharePoint edition of the Quickr site, and would manage the interaction between the two. The SharePoint user would access all of the information through the SharePoint user interface, and the Quickr user would use Quickr.

- Tasks can be assigned within a Basecamp site. The bridge would bring all of those into a nominated SharePoint site and allow the user to work with them within SharePoint (and by implication of other things in this paper, on their mobile device). Tasks that are marked off as completed by the SharePoint user on their mobile device would then flow back to Basecamp through the bridge.

Think of it as a collaboration edition of the email gateways of yesteryear.

Creating such a bridge involves understanding data transformation, and creating appropriate integrations between the meta-model of one tool and the meta-model of other tools. This would be delivered as a separate server infrastructure at an organization's site, and would do all of the translation work between the various tools that people were supposed to work with.

For additional background, see co.michaelsampson.net/opencw.html

Synchronizing with a Master Contact Directory

SharePoint sites can have a list of contact records, and the details of each must be created and stored at a site level. This means that if an external person is being tracked in ten different internal projects, their contact details must be created, stored and updated in each site.

This is a bad way of doing things, and leads to information atrophy. There needs to be a capability for having a central place to store contact details, and then noting that a given contact record should be included in a given SharePoint site. Or perhaps it works the other way around; the person is added to the SharePoint site, and then a connection is made between it and the master contact record in the central database.

This allows for the centralized update of contact records and the flowing out of those updates to all of the sites that are affected. This is sort of where meta-directories and

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virtual directories have played a role in the area of identity management within enterprises. Those same ideas could now be applied to keeping contact details up-to-date over a set of SharePoint sites.

Regulatory Compliance and Chinese Walls

Some people and some groups of people aren't allowed to communicate by electronic tools, and while there are mature products for keeping them apart by email and IM, we don't yet have ways of keeping people out of the same SharePoint sites.

Consider the financial services industry. The utopian vision of collaboration vendors that "everyone can talk to anyone" is fundamentally flawed and leads to big fines and people going to jail. Thus in the world of email and IM, there are electronically erected Chinese Walls to keep people on one side of the house from talking with people on the other side of the house. If someone tries to send a message to someone they are not supposed to talk with, the message is prevented by policy from being delivered, and the fact that the message was even attempted is noted for follow up. Unless an organization builds its own tools for such policy compliance in SharePoint, there is nothing to stop people in these groups from being members of the same SharePoint site.

Therefore, create a product that applies the same rigor for policy definition and enforcement in email to SharePoint. And for double points, help organizations by defining an overall set of rules that say who can and who can not interact, and then write connectors to link that rule base with all of the disparate and different tools that are in place. This results in a unified set of rules and policies, linked to many systems that consume and enforce the rules. Write once, enforce everywhere. This is the holy grail, and helps insure the CEOs stay out of jail, a benefit that is top-of-mind for many.

Next Actions for Microsoft

We see two key next actions for Microsoft for direct improvement of the Pillar 1 capabilities of SharePoint.

Parlano and SharePoint

The acqusition of Parlano for its MindAlign persistent chat product was a really good move by Microsoft; we have held a high opinion of the development work and marketplace success that Parlano cultivated. However, the days of MindAlign being standalone and a competitor to Microsoft Office Communications Server are now gone, and the question comes as to the relationship between MindAlign and SharePoint.

Microsoft needs to define the positioning and integration strategy for MindAlign and SharePoint. Both offer a group and team-oriented way for people to share information, to track what is going on, to share documents within the context of business activities, to be alerted about matters of interest, and more. Does MindAlign become subsumed by SharePoint, so that a MindAlign channel can be surfaced within a SharePoint site? Or do they continue along two separate tracks? What should an organization with both tools use for team collaboration and how do they relate?

To Wiki or Not

The integrations and partnerships with Atlassian and Socialtext for wiki integration send mixed signals to the market. On the one hand, it shows that SharePoint plays nicely with existing tools that organizations may already be using. For example, those with Atlassian Confluence are able to leverage their existing wiki environment and page configuration directly within SharePoint.

On the other hand, it signals that the wiki capabilities in SharePoint are sub-par, and can't compete with the best-of-breed alternatives. On balance, this is not good. Microsoft needs to either rapidly increase the technical functionality of the inbuilt wiki within SharePoint 2007 and then offer migration tools to enable organizations to shift away from current point solutions, or Microsoft should acquire a third-party wiki provider that offers better tools for the SharePoint end user.

Pillar 2. Location Independent Access: Opportunities

SharePoint 2007 earns a failing grade for location independent access. If all you want to do is access SharePoint when you are in the office or have your computer with you and an Internet connection, then it works admirably. But that's location *dependence*, not location *independence*. The latter requires suitable capability to work in an offline and disconnected mode, with full synchronization and conflict checking and merging capabilities in the mix. SharePoint doesn't do this (although Lotus Notes does—ouch), and when paired with Outlook 2007 or Groove 2007, life gets worse, not better.

Microsoft's inability to adequately address the needs of teams and organizations in the area of location independent access opens tremendous opportunities for third-party developers. Microsoft's offline and disconnected access strategy for SharePoint is fragmented and insufficient.

Opportunities for ISVs

There are excellent opportunities for ISVs in the area of location independent access to SharePoint.

SharePoint Desktop Rich Client

Forced reliance on a Web browser for team collaboration activities is not in the best interest of users. There are additional functions and performance that a rich client can offer, and ISVs that are currently building a SharePoint rich client are doing very well with direct sales and in partnering with Microsoft.

The market is not sewn up, however, and Microsoft has not to date made an acquisition. There are still opportunities for new entrants to this space that can add capability and simplicity to the needs of users. For example, although Colligo is currently the leading provider of a SharePoint rich client for online and offline access, it does not currently offer any capability to work with list items from across a collection of sites. That is, you work within a SharePoint site inside of Colligo, and you can not aggregate all of your task information across all of the SharePoint sites that you have in Colligo. Although this is something that Colligo could foreseeably offer, and we hope they do, it has not been done yet.

If the product was done right, it could almost displace Outlook as the place for working with SharePoint information. At the moment, Microsoft has not delivered a rich client for SharePoint, but has instead tied SharePoint to Outlook. As more and more team and project work is done in SharePoint rather than in email, there is no particular reason why

Outlook needs to retain such a prominent place. It suits the Outlook Product Group at Microsoft, but it isn't necessarily the best decision for end users.

SharePoint to Mobile Device Synchronization

Accessing SharePoint on mobile devices will remain in the domain of the uber-geek until a vendor does for this area what Research In Motion did for wireless email. With only being able to access SharePoint sites via the mobile view, and thus being at the whim of network speeds and the constraints of the mobile view, the current way of doing things isn't going to become a must-do or must-have capability.

Capabilities that are needed to make this a viable business tool include:

1. Notifications of upcoming meetings that have been scheduled in any SharePoint site that the user belongs to.

2. Sychronization of multiple SharePoint sites with the Calendar application of their mobile device.

3. Initiating meeting invites and requests from their mobile device for a specific SharePoint site. This means that the user can create a calendar entry on their mobile device and select which SharePoint site it should become a part of.

4. Synchronization of multiple SharePoint task lists with the native Tasks application, so that a user can get a summary view of all of the things they are supposed to be working on. Equally, as will be noted in Pillar 6, end users should be able to create a task in the tasks application of their mobile device and select which SharePoint site it should become a part of.

The above list is not intended to be exhaustive.

Hosted SharePoint Extranets with Internal Integration

The limitations in linking SharePoint 2007 with Groove 2007 for external collaboration points to the need to have some other way of doing this. Many corporate IT departments are reticient about allowing external users into their internal SharePoint infrastructure, and so rather than each organization deploying and managing its own SharePoint extranet space, there is an opportunity for trusted third parties to do so. The key requirement, however, is that there is an automated workflow tool that transitions a SharePoint site off the hosted extranet at the end of the project and inserts it into the SharePoint environment of the originating user organization. This means that end users can work in a seamless way with their internal SharePoint implementation and the sites therein, as well as with externally hosted SharePoint sites.

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Next Actions for Microsoft

Microsoft needs to improve its game with respect to location independent access to SharePoint. The following are key areas that must be addressed:

- Fully integrate all of the collaboration tools between Groove and SharePoint, or cease positioning Groove as an offline tool for SharePoint. As is documented in our SharePoint 7 Pillars White Paper, the additon of Groove for the purposes of bringing external people into a team using SharePoint is fraught with major problems. Fix it or kill it.

- Enable more fine-grained synchronization between Outlook and SharePoint, with conflict flagging in the SharePoint lists rather than in Outlook. Synchronization at the item-level is insufficient to handle the needs of collaborative teams where artifacts are in a constant state of flux. Synchronization needs to be done at the field level within items, and SharePoint needs an engine to resolve conflicts and integrate complementary changes.

- Fix the synchronization of document libraries between Outlook and SharePoint so that it happens automatically and invisibly, or remove the functionality. Requiring users to re-open documents when they are connected to the network and saving again them directly into SharePoint is pathetic.

- Introduce the ability to connect all of the lists in a SharePoint site to Outlook in one connection command, rather than having to do so on a list-by-list basis. This eliminates the need for users to take lists to Outlook on a list-by-list basis, and means that whatever the user has in Outlook is a current statement of what is in the SharePoint site.

- Eliminate Outlook's dependence on storing local data in PST files and create an Outlook database engine that can segregate information at a row level, rather than at the current PST level. Alternatively, make the linkage between SharePoint and the user's Exchange account, rather than bypassing Exchange as is done today.

- Upgrade the integration of SharePoint with Windows Mobile devices so that the native applications on mobile devices for task and calendar management can work directly with SharePoint. This means that users can filter their task list to show only the task from a single SharePoint site, or they can see a complete list of all their tasks, or that they can create a new task for one of the SharePoint sites that they are involved with.

Pillar 3. Real-Time Joint Viewing: Opportunities

SharePoint earns a passing grade for Pillar 3 by virtue of its tight integration with Office Communications Server 2007 (which is likely to be available in an organization that embraces SharePoint) or with the free SharedView tool from Microsoft.

Opportunities for ISVs

In terms of ISV opportunities, it's hard to know what to say about this one. On the one hand conferencing is a very mature market, but on the other hand the pricing structure of most real-time joint viewing tools are prohibitively expensive for everyone in the organization to have free and unconstrained access to them. But then that's a pricing issue not a functionality issue. And perhaps the introduction of the free Microsoft SharedView tool even eliminates that as a barrier to widespread adoption and usage.

Nonetheless, two ideas are noted below.

Single-Click Real-Time Session Initiation

To those with real-time joint viewing products and services, having an integation with SharePoint is a good next step. Just as many offer an add-in tool for Outlook, so an add-in construct could be added to SharePoint. This would give a single click method of starting a real-time joint viewing session, as long as there was some easy way of inviting others to see the same information.

Real-Time Shared Web Part

Holding a real-time joint viewing session today involves having access to a third-party product or service for screen sharing. This isn't the definitively correct way to support real-time sharing, and there is an alternative approach that could be taken. That is, build a Web Part that permits whoever is online to collaboratively create and edit a document or other artifact directly within the SharePoint user interface and without the requirement to have anything else in the mix. Think of the real-time joint editing software SubEthaEdit, and replicate that within SharePoint.

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Pillar 4. Team-Aware Calendaring: Opportunities

Getting people to work with and trust their electronic calendar has been a long road, and just as we get to the place where people have well established habits, SharePoint ruins it. As noted in the SharePoint 7 Pillars report, SharePoint 2007 fails the needs of collaborative teams in the area of calendaring.

Opportunities for ISVs

Improving the capabilities of SharePoint for team collaboration and productivity in the area of team-aware calendaring is a major need and therefore opportunity in the next few years. The opportunities that we see in this regards are noted below.

Calendar "Sniffer" Server for SharePoint

There needs to be a way of automatically notifying people about all of the meetings and events that they are involved with in all of the SharePoint sites in the organization. We think of this as a "calendar sniffing server", something that sniffs out all of the relevant meetings and events that people are invited to across the entire SharePoint infrastructure, and then advising people through ghosted calendar entries of what's up. Assuming that people will find all of those meetings themselves is expecting too much.

And although this is partially related to Pillar 7, there should equally be a sniffing and notification service for events that a person is likely to be interested in based on the work that they do and the interests that can be inferred about them. The person shouldn't have to seek them out; they should find the person.

Synchonization with Mobile Devices

SharePoint needs to support wireless synchronization between SharePoint and mobile devices. What Research In Motion did for calendar entries that are stored in Exchange being pushed out to BlackBerry devices now needs to be done for calendars that are mastered in SharePoint. This is an example of where the supporting infrastructure is fairly immature, and more is needed if information workers and executives are going to make SharePoint a trusted place for team collaboration.

A Microsoft Calendar Server

Build a connector between SharePoint and Exchange Server so that SharePoint meetings are taken into consideration when a free-busy search is undertaken. Or, if more and more calendars are going to be mastered in SharePoint, and therefore over time a greater proportion of meetings will be in SharePoint than in Exchange, build a calendar server that integrates with both to be the organizational master for calendaring information.

Other Things

Some other observations about the state of calendaring in SharePoint:

- Microsoft has decided that when SharePoint is linked with Outlook, SharePoint list information such as calendars will be stored in a separate PST file. That kind of makes sense ("keep the SharePoint things separate"), but doesn't really stack up ("but it's all my stuff, isn't it?"). What is needed instead is a way for the SharePoint list information to go into the user's main Outlook data store.

- There needs to be a better way of integrating SharePoint with Outlook. Having to click to take each list to Outlook one-by-one is technically beautiful but practically annoying. Create a better way to link SharePoint and Outlook, so that a user has the choice of taking all of the relevant lists in a SharePoint site to Outlook in one movement.

- Despite repeated requests to make the linkage between Outlook and recurring Meeting Workspaces less brittle, Microsoft has been unable or unwilling to deliver on what is required. Can you develop a solution?

- It is not possible to set a time zone for a meeting in a SharePoint site, which makes meeting scheduling between distributed teams a more difficult process than it needs to be.

Next Actions for Microsoft

Microsoft greatly needs to improve its game with team-aware calendaring; what is currently offered is absolutely below standard. It is fully within Microsoft's power to do something about it, and speaking strategically (that is, these are the rules under which the Product Groups need to march), the following are key areas that must be addressed:

- Meetings that have been set in a SharePoint team site calendar have to do something when they are brought by the individual into their Outlook calendar. Looking pretty is not enough. SharePoint meetings in Outlook need to be taken into consideration when a free-busy search is undertaken.

- A wireless notification service for SharePoint calendar events, as with Exchange calendar events, needs to be developed. Whether this is part of Exchange Server or is a SharePoint specific extension matters less than that it exists and thus informs users about where they are supposed to be at any given point in time. And the calendar notifications should take place within the context of the user's calendar on their mobile device, not just as an email message.

- Greater resilience is needed in the system for setting up a recurring meeting in Outlook and associating a meeting workspace with it. Today, when one of the recurring meetings is rescheduled in Outlook, the linkage with the Meeting Workspace in SharePoint is broken.

- There should be a discovery service that constantly runs across the SharePoint infrastructure to automatically find SharePoint calendar meetings that a person is involved in or invited to, and they should be notified about these by having them auto-added into their calendar. Assuming that people will go through the process of adding every SharePoint team calendar to Outlook manually is assuming too much perfection in human behavior.

- With the addition of calendar information into SharePoint, Microsoft needs to make a strategic decision as to whether Exchange Server is still the right architectural component to host the calendaring data, logic and services for information workers, or whether now is the time to extract it into an enterprise-class federated Calendar Server.

- When working on a mobile device, users need to be able to set up a meeting for a specific SharePoint site directly within the calendar application of the device. This will require the ability to nominate the SharePoint site in which the calendar entry is to be created. The Windows Mobile team has some work to do in this regards.

- The use of a separate SharePoint PST file in Outlook appears to be the major design shortcoming in this area for Microsoft. It is segregating data at the level of a file, rather than segregating it at the level of a record within a database. It is time for Outlook to be based on a more powerful database engine, which will therefore permit the inclusion of record items from many places, with rights managed on an item-by-item basis, not at the file level.

- There is a nuance in the use of site-specific calendars that needs to be modeled in SharePoint. Each team or project has a core set of team members, for who calendar entries are *appointments to attend*, and should be shown as such on their calendar. Equally, each team or project normally has a supplementary group of interested stakeholders, for who calendar entries are *informational*. A site needs to offer a method for distinguishing between these two groups, and thus driving differential behaviors of the respective calendar entries.

Pillar 5. Social Engagement: Opportunities

Microsoft earns a passing grade for Pillar 5, due in part to the existence of native blogging capabilities in SharePoint, and in part to the assumption that most organizations that embrace SharePoint will also embrace Office Communications Server (and thereby gain presence and real-time interaction capabilities). The following are the opportunities we see in this area.

Opportunities for ISVs

There are fewer opportunities for ISVs to enhance the Pillar 5 capabilities of SharePoint 2007; SharePoint offers native blogging tools (thus meeting the framework), and with Office Communications Server 2007 in the mix, both presence and a range of real-time interaction tools such as instant messaging and voice calling are available. Performing post-blogging content analysis and matching is in the realm of Pillar 7, not Pillar 5.

We don't see this as being an area for investment due to the small anticipated financial upside; that is, unless you can convince a large segment of SharePoint customers that your blogging platform is far superior to the SharePoint blogging tools and will result in better connectivity being encouraged between people.

Next Actions for Microsoft

The Pillar 5 capabilities in SharePoint can be improved in the following ways:

- Microsoft should keep deepening the maturity of its capabilites for real-time interaction between people, and for making it as seamless and ubiquitious as possible. The less hassle required in shifting from the desire to interact in real-time with another person to actually being there the better.

- Provide in-context quick notification of information about other people when a real-time communication episode is being considered. For example, display the other person's latest blog posts as a pop-up; at a basic level display the raw post headlines, or for a better and more advanced approach, display headlines that are filtered based on the shared interests of the two people.

- Develop capabilities for aggregating blog feeds that are relevant and of interest to the people in a given SharePoint site, and enable team members to automatically receive a subscription to the aggregated feed. This means that team members automatically receive access to relevant information by virtue of their membership on the team.

Pillar 6. Team Task Management: Opportunities

SharePoint fails the needs of collaborative teams in the area of team task management. While tasks can be created in project- and team-related sites, it is not possible for individuals to get an overall view of all of the tasks that they have been assigned. This creates opportunities for ISVs to create better functionality for SharePoint.

Opportunities for ISVs

The poor state of play with team task management in SharePoint represents a fantastic opportunity for someone who can get it right. The main opportunity is to provide an overall summarization and prioritization tool for tasks.

An Integrated Task List Application

There needs to be a way for end users to see the totality of the tasks that they have been assigned across their Outlook Task list and all of the SharePoint sites that they are involved in. This should automatically capture and display all of the tasks that a person has been assigned, and permit the categorization of those tasks into groupings that make sense for the individual. The categorization information does not necessarily need to be synchronized back to SharePoint—it is more a matter of defining a set of private labels or tags that help the user make sense out of the work they are being asked to do.

Key capabilities for such an integrated task list application are:

- Automatically capturing tasks assigned in Outlook or in a SharePoint site.

- Permit the user to define additional categorization labels and tags for each task, depending on their interests and way of working.

- Support bi-directional synchronization between the desktop and the Tasks application on a Windows Mobile device, so that users can have all their tasks information with them when they are away from the office with a mobile device. Whenever a task is marked complete in one of the places, the completion information is synchronized to the other places where that data is stored.

Next Actions for Microsoft

Having considered the state of play for SharePoint as a tool for enabling team task management, Microsoft needs to significantly improve its game:

- SharePoint should have an auto-discovery service so that people can be automatically informed about everything that they are responsible for, across all of the SharePoint sites that a person is involved with. This should be a SharePoint-delivered capability, not one that requires the existence of Outlook 2007 (and perfect behavior to make it work).

- Mobile device synchronization software between Outlook and mobile devices needs to be improved so that mobile devices can synchronize with multiple master task lists, or alternatively, the ability as a configuration option to synchronize with the SharePoint PST file rather than the Outlook PST file. Although this second option would require that people create a SharePoint site for their own private task list (or use MySite), it would give them a full carry around list. They would still need to ensure perfect behavior in adding all of their task lists to Outlook for this to work, but if the auto-discovery service as noted above was developed in parallel, the result would be excellent.

- Improve the Tasks application in Windows Mobile so that it can work with multiple task lists—both the standard one in Outlook and any other ones that the user has added from SharePoint. This means that tasks from SharePoint would synchronize down to the mobile device, and when checked off on the mobile device, they would synchronize back up through Outlook to SharePoint (or if the device could handle it, directly from the device to SharePoint). In addition, the user should have the option of creating a task on the mobile device and stating what SharePoint task list it is related to.

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Pillar 7. Collaboration Auto-Discovery: Opportunities

SharePoint fails the needs of collaborative teams in Pillar 7, that is, in auto-discovering opportunities for collaboration between people within the organization.

Opportunities for ISVs

Addressing the needs and requirements of collaborative teams regarding collaboration auto-discovery is, in our view, the largest opportunity for ISVs in the realm of SharePoint as a collaboration tool. Systems that can proactively suggest people and resources that can speed time-to-closure of business issues is of paramount concern.

The following are noted as key ideas for ISVs.

Inference Engine for Interests and Expertise

There is a lot more that could be done for automatically reasoning out the interests, expertise and areas of competence for a specific person. For example, where an organization has embraced Microsoft Exchange Server for email and calendaring, a large volume of information builds up over time on the topics that people correspond about, on the nature of the meetings that people attend, and on the people and projects that they are linked with as a result of such intelligence. Organizations need a way to get this business intelligence out of Exchange Server (and this is technically possible because archiving and compliance management vendors take content out of Exchange for their purposes), combine it with the intelligence that is created over time in SharePoint, and use the resultant data sets to automatically infer interests and expertise of people.

Once the inference engine has started to collect and process information on interests and expertise, the next step is to proactively suggest people and resources that have interests and expertise that align with the needs of teams using SharePoint for collaboration.

The inference engine could also be used to automatically update the interests of each person as stated in the MySite tool. Currently the statement of these requires explicit definition by people that they have interests in a certain area, but with an inference engine that was able to deduce the full extent of their real interests, the full knowledge of the people in the organization would be available for being leveraged.

Mapping the Relationships between SharePoint Sites

SharePoint sites can be placed into a hierarchy related to business functions and divisions, or indeed, any other classification scheme that the organization decides to adopt as being the most natural approach. While this puts sites together that share an similar home in the organization, it doesn't necessarily reflect common interests across sites in different divisions and parts of the organization. What's needed is a way for the nature of the work being done in different SharePoint sites to described and then to be correlated and mapped against all of the other SharePoint sites in the organization. Perhaps this is partially done by self-description via keywords, and partially done using the Inference Engine to determine the full extent of the work being done in each site.

This idea would lead to a graphical map that shows the interrelationships between sites based on an analysis of the classification information in each site. Once these interrelationships were declared and mapped, then the people who were most active in working on certain topics and interest areas could be overlaid and new opportunities for collaboration seen.

Next Actions for Microsoft

Just as people within SharePoint have the ability to set up their details page in their MySite area about their interests, so that others can view information about them when browsing their shared page, so specific SharePoint sites should have a place for declaring descriptive data about what they are being used for. This would enable the assemblage of a related set of SharePoint sites based on metadata. People within a given site could be notified about sites that were working on parallel and complementary areas, with certain information being made available to everyone or just to the administrators and moderators of another site.

Improving the Capability of Teams that Can't Be Together, To Work Together

Conclusions and Recommendations

This ideas paper has outlined how and where new products and services can be developed to resolve the weaknesses of SharePoint for team collaboration. This analysis has extended our research into the efficacy of how well SharePoint meets the needs of team collaboration in light of the 7 Pillars model.

Conclusions for ISVs

The main conclusion for ISVs is that there are many ripe opportunities to complement the collaborative capabilities of SharePoint, either with an end game in mind of earning licensing revenue or an exit strategy of being acquired by Microsoft to quickly add maturity to the collaborative capabilities in SharePoint.

There are many ideas in this paper as to where ISVs can build products and services to enhance the team collaboration capabilities of SharePoint.

Conclusions for Microsoft

With regard to collaboration, SharePoint does one thing well, and many things poorly. If "integrated innovation" is to be more that just a nice phrase, Microsoft Product Groups have to leave behind ancient rivalries and embrace a collaborative approach to the delivery of client-focused solutions.

There are many pointers and ideas in this paper as to where Microsoft needs to enhance its capability with respect to the team collaboration use case for SharePoint.

About The Michael Sampson Company Limited

The research and consulting work of The Michael Sampson Company is focused on improving the capability of teams that can't be together, to work together. Or more simply, on collaboration.

Intent and Focus

Our lens is focused on individuals, teams and organizations trying to make good use of collaboration technology in order to make business happen.

We think of it as "Collaboration Ethnograghy", a focus on what really works in day-to-day work situations here and around the world.

All of our work seeks to make organizations successful in what they do, through writing, consulting and leading workshops.

Values

We value independence and impartiality—we're not a mouthpiece for any vendor, although we will support organizations to be successful with their tools.

We value deep engagement and excellence—the world of work and business is too complex for simplistic answers.

We value thinking and deep knowledge—and much of our time outside of client engagements is focused on advanced learning.

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