



## Utilizing SharePoint to improve your business

By Robert Crane

October 2008

### Overview

This document is a summary of the presentation that I gave at SMBNation in October 2008. I thank SMBNation for the opportunity to present this material to attendees.

This presentation will take you through how a business like yours can implement SharePoint inside your operations to improve productivity. Learn how to work smarter with SharePoint. The presentation will show you what works and what doesn't work with SharePoint inside a business and how to leverage that knowledge to produce better business, for yourself and your customers.

### Advertisement

*The Windows SharePoint Operations Guide (<http://www.wssops.com>) will help the IT Professional install, configure and maintain Windows SharePoint in a variety of environments. Since the product is subscription based you always get access to the latest SharePoint information in a clear and concise manner. For the price of a few hours of work you can have access to an ever growing library of SharePoint knowledge. It'll not only save you time and money but help you generate more revenue by teaching you about the fastest growing Microsoft technology. Sign up today and start reaping the benefits.*

### The good, the bad and the ugly

I'd like to start off today by talking about the good, the bad and the ugly. The good is the fact that I can say that Windows SharePoint Services v3 (WSS v3) will run on every Windows platform that I have heard mentioned at SMBNation. WSS v3 will run on Windows Server 2003, Small Business Server 2003 and 2008, Essential Business Server 2008 and so on. The bad is that I can honestly say that I have heard the word "SharePoint" used in nearly every session but I haven't really heard much more than that. It seems to be a case of 'oh yes, and it works with SharePoint. Next topic'. The ugly is the fact that almost everyone I have spoken to here at the conference does not use or implement SharePoint. How can that be? The product has been around since the initial release of Small Business Server 2003 (SBS2003), yet almost nobody seems to have any idea about how to use it let alone implement it with their customers.

As we move into a contracting economy for the foreseeable future I also hear a lot of talk among attendees about how difficult it is to compete these days. I hear a lot of talk about slim hardware and software margins. I hear a lot of talk about 'hosted' and 'cloud-based' solutions and their destruction of the business models for SMB resellers. What I truly can't figure out is why these people are looking at the glass as half empty? It doesn't make sense to me to try and compete in an already crowded market, where prices are constantly being driven down. It seems far more logical to move to an area where there is little competition yet boundless opportunities. It staggers me that people don't



seem to be able to draw the connection between the opportunities SharePoint presents to their business and a desire to move into an area where there is less competition.

### **Agenda**

The aim of this presentation will be to cover the following topics:

- Being in business.
- What is SharePoint?
- Improving productivity.
- More revenue.
- Business value.
- Opportunities.

### **Being in Business**

The first question I have to ask you is – are you actually running a business? Or are you simply enjoying a hobby? A business is designed solely to create profit for the owner. Now, profit doesn't always have to be money, although it typically is. Profit can mean that you have more time to spend with your family, it may mean that you don't have a boss, which is all fine. However, don't be lulled into the false belief that you are in business when you are simply enjoying a 'lifestyle occupation'.

So, if you are in business what are you in business for? As I said before, if you are in business you are in business for profit. Nothing more, nothing less. Simple. Since we will focus on monetary profit let's now define what profit is. Profit is simply the difference between the amount of money your business generates (revenue) and the amount of money it uses (expenditure) to generate that revenue. So, if something in your business doesn't either generate more revenue or reduce expenditure what good is it? The reality is that anything that matches these criteria is certainly not contributing towards the profit of a business and therefore should be seriously considered as to whether it is 'needed' within the business. How many people actually look at things in their business in this light? Very few I believe.

Let me ask you another question. Have you read "The E-Myth" by Michael Gerber or "The Four Hour Work Week" by Timothy Ferris? If you haven't then you should. Both books have been a revelation to the way I think about my business and have helped me endlessly redefine and optimize my business.

"The E-Myth" by Michael Gerber is all about standardizing your business, installing procedures and checklists so that the good things about your business are replicated and the poor things are eliminated. "The Four Hour Work Week" by Timothy Ferris is all about improving productivity. It speaks to automation, simplification and increased productivity in a business. The process of this presentation is not to delve into these books, because you should do that for yourself, however I will be reinforcing many of the principals where I believe SharePoint can aim your business from information provided in these books.



## **What is SharePoint?**

If you look at the Microsoft SharePoint site there is talk about how SharePoint is a ‘collaboration’ solution, a business portal, provides content management and so on. Now ask a customer who hasn’t seen SharePoint what they believe these terms mean to them and I’m pretty sure you’ll draw a complete blank. Customers these days really don’t care about technology, much like electricity it just needs to be there. Over the years they have been promised the world with complex terms like ‘collaboration’ but in most cases the results have failed to deliver. Don’t get me wrong, technology is important, if not essential to most businesses these days. As I said before, they want something that either improves their revenues or reduces their expenditure, that is, makes them more profit. Simple.

So, what is SharePoint then? Basically, it is just a tool. Think of what other tools customers probably have on their desktops. Things like Word and Excel are very similar to SharePoint. Why? Because when you fire them up for the first time you are presented with a blank page or spreadsheet. You have to put the data into it before it has meaning. You have to put the business value into it before it has any worth. These tools do nothing by themselves, they only start to contribute value to the business once they have information inside them.

If anyone asks you what SharePoint is you should tell them it is a tool. As Thomas Carlyle said “Man is a tool using animal...without tools he is nothing, with tools he is all”. My aim here will be to show that SharePoint is a tool to lower expenses and that SharePoint is a tool to increase revenues amongst other things. Customers want flexible tools to help them solve their business challenges. Why do you think Word and Excel are on almost every desktop worldwide? Because they are a great, flexible tools. How many ways can you create a Profit and Loss statement in Excel? Millions and millions of different ways, yet in the end they all produce the same result don’t they? That’s the role tools play, they allow people to achieve the result they want in the manner that suits them best. I believe you are going to have much less issue implementing a “tool” rather than a “collaboration solution”, even though SharePoint is both.

So, now consider your own business. Which is easier? Increasing revenue or decreasing expenses? I believe that lowering your expense is the easier option for the simple reason that you have direct control over the expenses in your business unlike revenue which is derived from parties outside your business. Thus, if you are able to reduce your expenses it has an immediate impact on the bottom line of the business, thereby increasing profitability. With this mind let us take a close look at how we can go about lowering the expenses in our business.

Take a moment to consider what many businesses spend most of their day doing. Ask yourself where business waste time, effort and money. More importantly where are businesses losing productivity? I think the answer to these questions is that most business teams spend a lot of their time searching for information. Here are some figures I found to give you an idea of the impact of time wasted searching for information:

- *15% of a typical information workers day is spent searching through content, like Web, digital communication and paper work – NY Times 14 Jun*



- *Butler Group reports up to 10% of staff costs are lost, because employees can't find the right information to do their jobs.*
- *Middle managers spend more than a quarter of their time searching for information necessary to their jobs, and when they do find it, it is often wrong, according to results of an Accenture (NYSE: ACN) survey – 2007*
- *“the typical information worker now spends up to one-quarter of his or her day searching for the right information to complete a given task” – Network World*

So it seems clear to me that most people in business waste a lot of time looking for information they need to do their job. I'm sure you have experienced the feeling of frustration of not being able to find that email, that document or that note that will help you complete your current task and move onto the next item on your agenda.

Here's where a tool like SharePoint can help. How? Windows SharePoint v3 (WSS v3) has search capability built into the product. This means that just about every piece of information you place into SharePoint is automatically indexed and can be searched on. Not only does this include data you enter manually but it also includes every Microsoft Office document you upload and with some additional configuration, even third party products like Acrobat documents can be indexed.

Let me give you another very practical example. WSS v3 now includes a feature known as wikis. I'm sure most people are familiar with the concept of Wikipedia on the Internet, well wikis in SharePoint are very similar. Basically they are online documents you can create in a web browser without the need for any software on the client. Thus, you can create documents that include hyperlinks, pictures, formatting and so on all through a browser. Wikis are perfect for knowledge bases. We all have too much to remember so the experts tell us that we should write it down. Instead of writing it down we should really enter the information into something like SharePoint. Once this is done, not only does it mean I have documented the information it also means that it is searchable and backed up!

With SharePoint you can have as many wikis as you want. In fact I have run multiple wikis in my businesses for a very valid reason which I will cover later on. There is nothing stopping you having a technical wiki and a business wiki to capture all forms of information about your business.

Let me also briefly introduce you to another free technology from Microsoft that can greatly benefit the ability to locate information. Search Server Express 2008 allows you to index content within SharePoint and also external to SharePoint. With Search Server Express 2008 you can now index network file shares, web sites and Exchange public folders as well as any SharePoint site. Now, we all know the mess that network shared folders can degenerate into. Imagine dropping in Search Server Express and indexing all that information. Now you don't have to worry about tidying up the data because it is all searchable. As I said, Search Server Express 2008 is a free download from Microsoft and can solve a major pain point for many businesses around locating information. Now consider how many businesses you know that could use this technology? How many are not going to be interested when you tell them the software is free?



CIAOPS Supportweb > General Knowledge Base

### General Knowledge Base

New Actions Settings

Type	Name	Modified By	Modified
<b>Count = 319</b>			
	0xc103798A on Swing migration	Administrator	27/12/2006 4:15 PM
	Acronis experience	NX6120 Laptop	8/12/2006 5:13 PM
	Acronis TrueImage BartPE Plug in	NX6120 Laptop	29/11/2006 9:55 AM
	Adding a hosted HOST1 email address	NX6120 Laptop	13/12/2006 9:20 AM
	Adding and swapping tape drives in Brightstor	NX6120 Laptop	17/12/2006 5:43 PM
	Additional SBS 2003 web sites	Robert Crane	23/12/2006 5:25 PM
	Allowing ATO ECI through ISA 2000	Robert Crane	17/12/2006 7:40 PM
	Applications prompting for user passwords	Robert Crane	23/12/2006 5:12 PM
	Automating eTrust signature downloads	NX6120 Laptop	17/12/2006 5:50 PM
	Backing Up and Restoring Windows SharePoint Services Files and List Items	Robert Crane	30/09/2007 3:27 PM
	Backup Exec System Recovery installation fix	Robert Crane	12/06/2007 12:23 PM
	Backup Exec System Recovery Support Tool	Robert Crane	12/06/2007 12:26 PM
	Blocking sites with ISA 2004	kbuser	10/01/2008 5:01 PM
	Brightstor build numbers	NX6120 Laptop	13/12/2006 10:22 AM
	Brightstor debug mode	NX6120 Laptop	17/12/2006 5:42 PM
	Bypass netgear startup wizard	NX6120 Laptop	13/12/2006 9:48 AM
	CA Licensing issues	Robert Crane	15/12/2006 12:59 PM
	CA product licensing codes	Robert Crane	15/12/2006 12:38 PM
	Changing Company details after installation	Robert Crane	23/12/2006 5:17 PM
	Changing company details in SBS 2003	NX6120 Laptop	13/12/2006 9:38 AM
	Changing OWA timeouts	NX6120 Laptop	13/12/2006 9:39 AM
	Changing server IP address with SCM	NX6120 Laptop	23/12/2006 8:27 PM
	Changing smtp port for email routed faxes	NX6120 Laptop	13/12/2006 10:25 AM
	Changing terminal server port	Robert Crane	24/12/2006 2:34 PM
	Chanhe Sharepoint admin port	kbuser	4/04/2008 12:35 PM
	Check listening port	Robert Crane	2/06/2007 10:17 PM
	Checking Backup Exec System Recovery installation	Robert Crane	18/06/2007 10:45 AM
	Checking GUID of Exchange 2003 private store	NX6120 Laptop	13/12/2006 10:33 AM

Here is a good example of what you can be achieved with a wiki. The above screen shot shows you a technical wiki I built. As you can see the wiki contains many different entries about technologies that I had needed to be able to refer to again in the future.

CIAOPS Supportweb > General Knowledge Base > How to Install a Public 3rd Party SSL Certificate on IIS on SBS 2003

### How to Install a Public 3rd Party SSL Certificate on IIS on SBS 2003

Edit History Incoming Links

**How to Install a Public 3rd Party SSL Certificate on IIS on SBS 2003**

Today we will discuss one method for installing a public certificate on your SBS 2003 Server. This post describes how to request and install the certificate into IIS. A future post will cover scenarios with ISA. Since there can be some delay with third party certificate authorities issuing your new certificate and you should not run OWA, RWW, etc without SSL, we suggest that you create a temporary web site for the certificate request as demonstrated below. Since we are using a temporary site we will not be using the CEICW for this process.

**Create a temporary site under web sites for your certificate request**

1. Select the Internet Information Service console within the Administrative Tools menu.
2. Select the Web Sites.
3. Right mouse-click and select New Web Site.
4. For the Web Site Description choose the site name you are going to use for your Certificate Signing Request (CSR) i.e. mail.contoso.com

**Web Site Creation Wizard**

**Web Site Description**  
Describe the Web site to help administrators identify it.

Type a description of the Web site.

Description:  
[mail.contoso.com]

< Back Next > Cancel

5. Select a Host Header value for this Web site that does not conflict with existing sites.

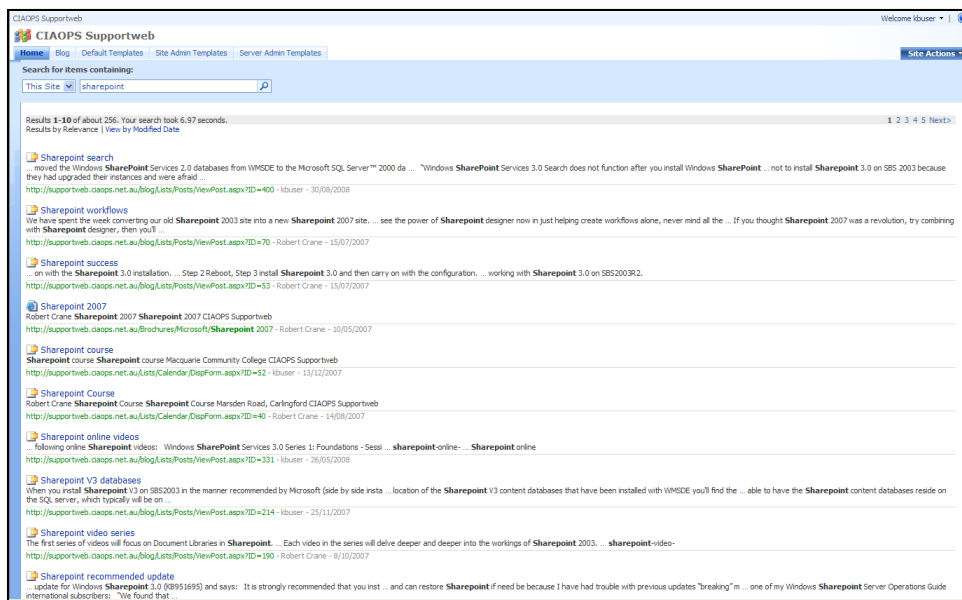
**Web Site Creation Wizard**

**IP Address and Port Settings**  
Specify an IP address, port setting, and host header for the new Web site.

Enter the IP address to use for this Web site.

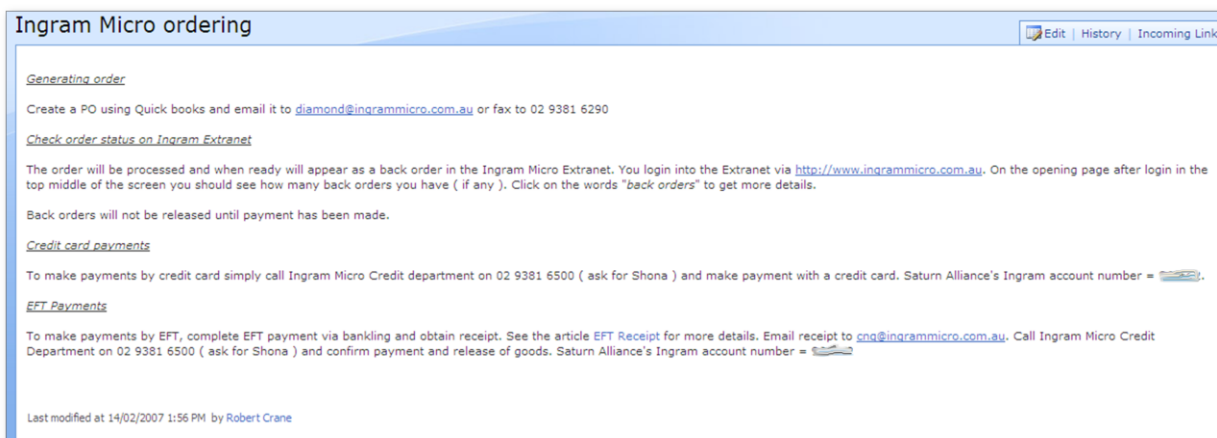


Clicking on any item would show the full document like what is displayed in the screen shot above. Because it is a wiki, I or members of my team, are able to go in and edit the information in this item via a web browser. That means that if I'm in the field I can simply access my SharePoint site remotely and enter the information I needed to remember rather than trying to keep it my head or on a loose piece of paper. As soon as the item is documented in SharePoint it is not only fully searchable but available to all members of my team.



As you can see from the above screen shot, I can search all the information in my SharePoint site which makes it a very powerful tool, especially when you consider that it can search inside documents as well.

Now on the subject of wikis, as it turns out I actually maintain three separate wikis on SharePoint. The first is for technical information like what you have seen in the previous screen shots, the second is for specific customer information which is simply information that relates to that customer and no others. Thirdly, I also have wiki that holds information about my business such as placing orders, collecting mail and so on. The question is why do I have these? Why don't I simply have a single wiki that holds all my information? More on this later.





The above screen shot is a good example of the information that is typically contained in my business wiki. In this case it sets out the steps required to order equipment from a supplier. It contains phone numbers, procedures, contacts and so on. Since it is documented, I can sit anyone down in front of it and they should be able to perform that task. Aside from that, all the information I have entered is completely searchable. This greatly improves the productivity of my business since the information they require is easily accessible.

Another major business challenge these days is communicating with employees. You may not be aware but:

- Employees need to know why they're doing what they're doing.
- Employees need to know the results they are accountable for.
- Employees need to know standards against which work will be measured.
- Employees need to know where the business is going.
- Employees need to know where their accountabilities fit into the overall strategy.

Do these sound familiar? If you have read the E-Myth by Michael Gerber then they certainly should be because that's where it's from. You can achieve this quickly and easily with a SharePoint component known as Announcements.

Announcements can also be used to display things like:

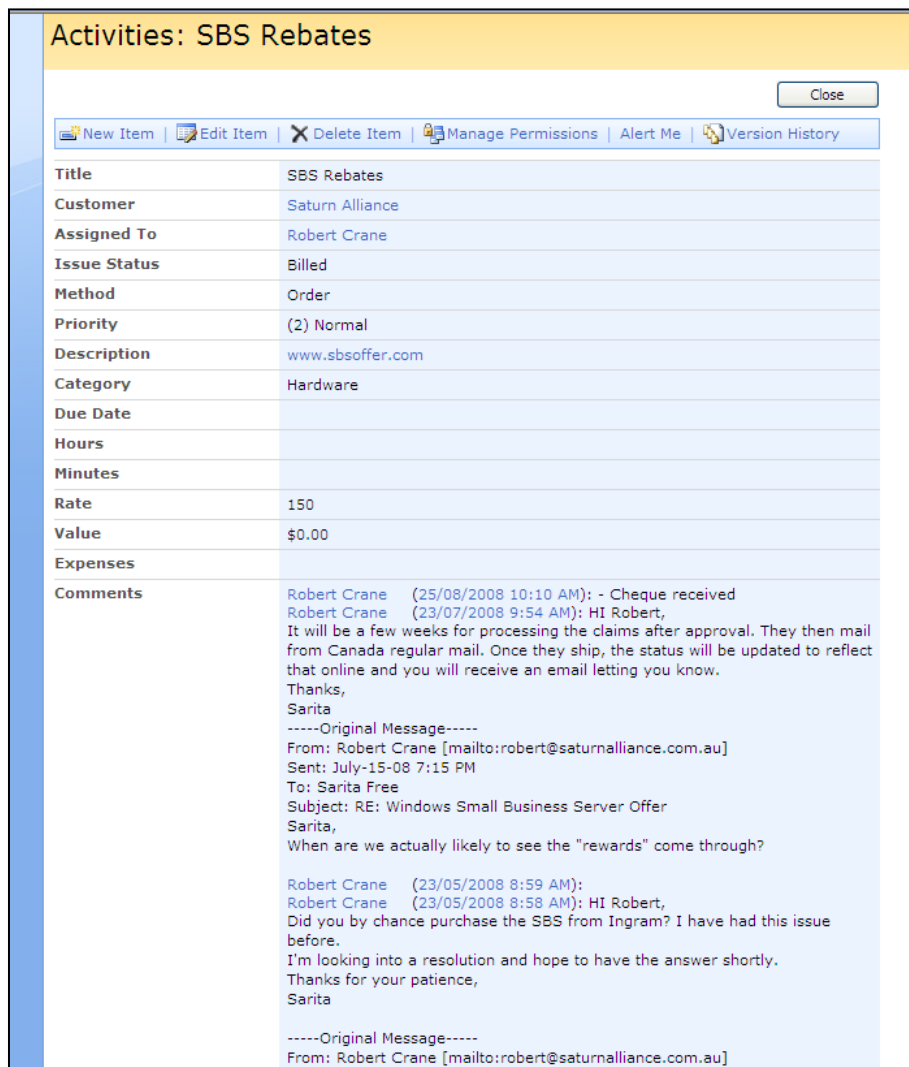
- Current Vendor promotions.
- Bank account details.
- Vendor account details.
- Upcoming installations/migrations.

Again, people within your business are better able to perform their work if they can find the information they require quickly and easily. Announcements provide an extremely simple yet effective method of communicating something across your whole organization.

Some other practical examples of what SharePoint can do in your business are firstly, it can be used to track issues. Now sure, CRM systems already do this and do it very well and I'm not suggesting that if you already have a tool that you are happy with you go out and replace it with SharePoint. In fact I'm just trying to give you a feel for the flexibility that can be achieved with SharePoint. In my case I had trialed a number of CRM systems and none of them really suited my needs. Luckily I was able to adapt SharePoint to perform almost everything I needed to capture information about the work performed for the client.

Another use for SharePoint I found extremely handy was for the tracking of orders. In many cases you don't get all the parts for an order from a single supplier. Co-coordinating these proved an excellent use

of SharePoint in my business simply because you had different payment types to different vendors, different stock levels and delivery dates and so on. SharePoint proved to me to be only tool flexible enough to handle this.



The above screen shot shows an example of an issue I was tracking using SharePoint. As you can see it was following up the payment of the rebates from a recent SBS campaign. I was able to copy the email correspondence into the issue as well as add my own notes. This made it extremely easy for me or other members of my team to see the rebates progress as well as making it easy to come back and pick up on the task at a later date. I can't tell you how much time it saved me to be able to come back to a task and pick up exactly where it had been left off with all the information in front of me. Even when the issue is complete I still have a copy that I can refer back to in the future.

Some other practical examples that I can give you of systems that I used included:



- End of month billings.

I always knew that I wasn't adequately tracking phone calls from clients I received. In many cases I also wasn't billing this information which meant that my business was missing valuable revenue. Thus, I created a system in SharePoint whereby I could capture all this information quickly, easily and then at the end of each month could filter the SharePoint data by client and bill for the work. Something so simple suddenly meant that I was getting a return for my time.

- Customer hardware.

Back in the day when my business used to sell white boxes, which we don't do any more, it was always a pain to track where each component came from, it's required drivers, suppliers, warranty life and so on. To overcome this I created a system in SharePoint into which I could enter all that information. The system could record all hardware information such as invoice and purchase order number which made determining warranty support a snap. Again, I could quickly sort by customer in SharePoint to locate the item in question in the shortest amount of time.

- Customer software & Renewals.

Most software these days requires some form of annual renewal. Typically, customers have renewals for all their different software on different dates. How do you keep track of that? Well I used SharePoint to great effect here. I created a renewal calendar in SharePoint into which I entered all the renewal information for all client software. I then linked that calendar to my Outlook so I knew when they were due. I also configured a third party tool in SharePoint that actually allowed me to send email alerts to prompt us for software renewals.

Yet another example was a SharePoint list I created that showed the installed versions of common software at all clients. Thus, when a new version of software became available we could run down the list and determine which client required it to be installed. At a glance we could determine which clients were up to date and which were not, allowing us to schedule maintenance time to get them current. Not only could we ensure that clients were up to date we could maximize our maintenance revenue.

- Vendor contacts.

How many different vendor contacts do you have? Does everyone else in your business know these? It makes so much sense to get these into a common location where they can be accessed by everyone in your business. As I have said earlier it is all about locating relevant information faster.

- Customer contacts.

In here we could enter specific information about the responsibilities of different people at the client's. We could establish who was the boss, the IT contact and the accounts



person. This allowed any member of my team to easily know the personalities and roles within a client. Imagine how much easier it would be for new staff to access to this information rather than having to determine it for themselves.

- Corporate calendar.

I know that you can create a shared calendar in Outlook but is it as easy as creating one on a web page? SharePoint not only allows you to do this but also allows you to link it to your existing Outlook. If SharePoint is available externally it means staff can look at the calendar quickly and easily by simply browsing a web page.

Title : Backup Exec System Recovery Desktop 6.5 (1)				
Title : Backup Exec System Recovery Desktop 6.5 12 months (1)				
Title : Brightstor Arcserve Backup r11.1 for SBS Premium (1)				
Title : Brightstor Arcserve Backup r11.1 for SBS Std (1)				
Brightstor Arcserve Backup r11.1 for SBS Std	47GDL-PUFG7-LVGNU-EGTBW-JPBXA	Saturn Alliance	Installed	Other
Title : Brightstor Arcserve Backup r11.1 for Windows (1)				
Title : Camtasia Studio 5 (1)				

Here is a screen shot of customer software keys that can be stored in SharePoint as another example of a practical use.

	Ingram Micro Vodafone Team		1300 139 405	vodafone@ingrammicro.com.au
ZCCR FM	Bunt	David		mdbunty@optusnet.com.au
A&E Computers	Filladites	Angelo	02 9667 0534	sm.solutions@bigpond.com
ACA Pacific	Mcabe	Larry	02 9922 5333	larrym@acapacific.com.au
Acronis	Acronis			
Acronis (Mannacom)	Support		02 3331 5990	support@acronis.com
Affordable Webs	Kemp	Tony	02 9654 9036	tonykemp@affordablewebs.com.au
Allaw	Support		02 9417 8171	
Anyware Computers	Steel	Aaron	02 9879 5788	aarond@anyware.com.au
APC	Support		1800 652 725	

As well as screen shot of vendor summary information saved in SharePoint.

Here are some more practical examples of what you can do with another feature of SharePoint known as document libraries:

- Policies and procedures.

Create a single location where everyone in your business can go to retrieve up to date documents such as policies and procedures, forms and so on.

- Run up documentation.

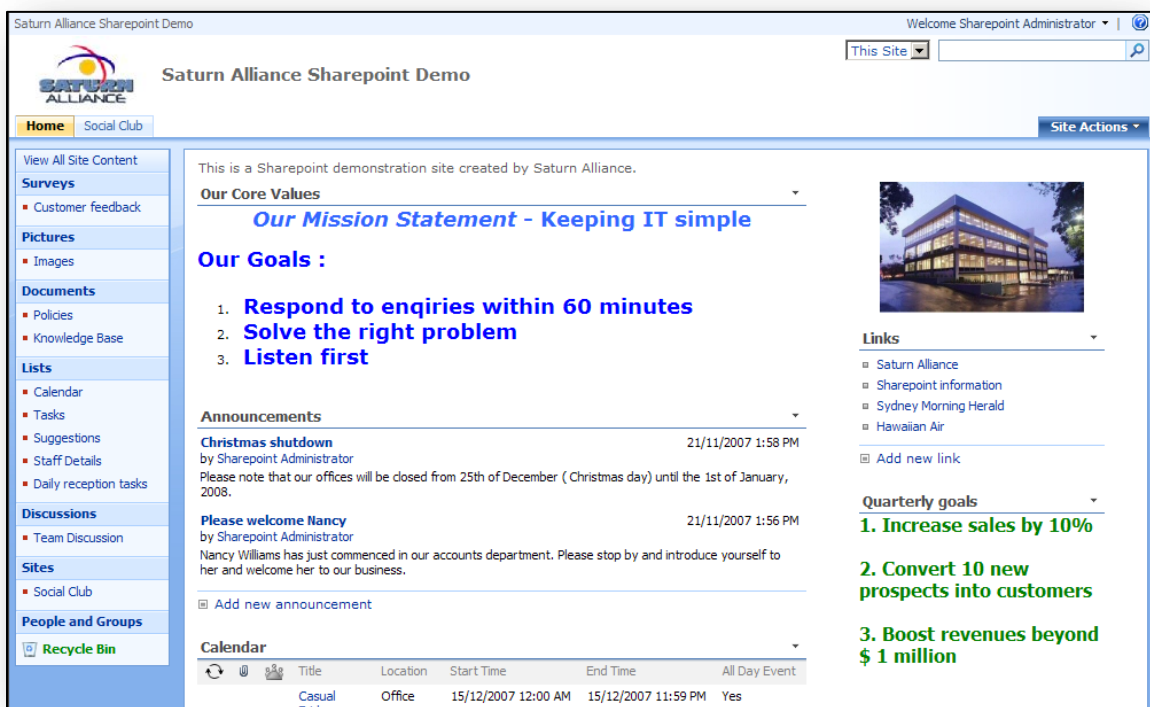
If you don't already, then you really should have documentation about the process required to run up equipment, especially servers. As this documentation is always changing it should be stored in a central location where all staff can access it quickly and easily.

- Marketing materials.

In my business I maintained a completely separate SharePoint sub site that contained all our marketing material. From flyers, graphics, campaigns, prospects it was all in one location. If we wanted to employ a telemarketer to come in and contact all our prospects with some offer then all we needed to do was sit them down in front of SharePoint.

- Standard email responses.

Many of the emails we would send out to clients as reminders for payments, to vendors asking for status updates and to prospects for example were almost identical. Therefore we created a SharePoint library of “standard email responses” that anyone could simply cut and paste into an email and send off. That way the same message always went out and people didn’t have to waste time working out what needed to be said in the email.

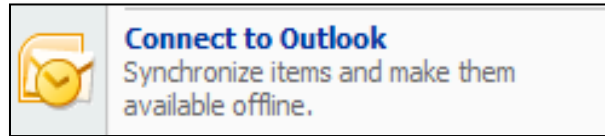


So here’s a good example of many of the features I have been talking about. In the above screen shot you can see that things like Key Performance Indicators (KPI’s), goals and mission statement are communicated on the front page. You’ll also find company announcements and calendar to let everyone in the business know exactly what is going on. On the left hand side you can see areas for corporate images, policies, a knowledge base, suggestions, details about staff members and daily reception tasks.

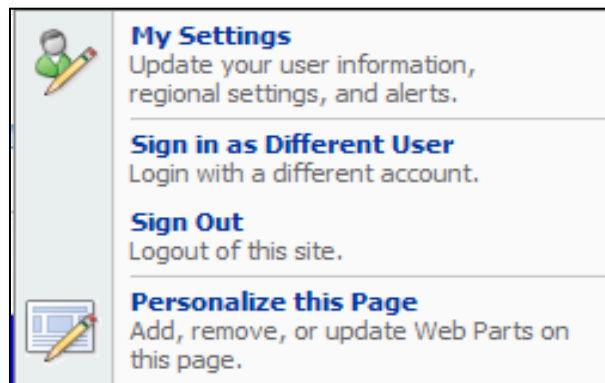
In reality, this page alone communicates a huge amount of information to members of your business quickly and easily. It is the first place in the business that they know to look for information to help them

do their jobs better. An added benefit of this is the fact that if staff know where to start looking they are far less likely to interrupt someone else to find the information, again increasing productivity.

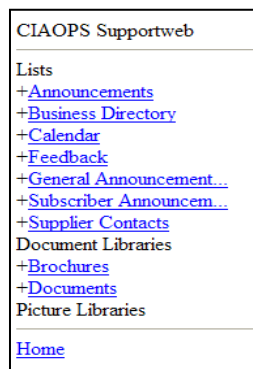
One of the complaints that I hear about SharePoint is that the information is only available within the business. Nothing could be further from the truth. SharePoint permits you to link to products like Outlook allowing you to take items like SharePoint calendars and document libraries offline.



You can easily publish SharePoint to the Internet, since it is simply a web technology, which from there can be accessed anywhere you have a connection to the Internet. It can easily be secured via logins with passwords and encrypted via SSL if desired.



Even better is the fact that out of the box SharePoint is “mobile-ready” and comes with a cut down interface that makes browsing via hand held mobile device easy.



So as I hope you can see that nothing can be further from the truth about remote accessibility. Not only can you store a huge variety of information in SharePoint but you can also access that information via a wide range of sources and devices.

Let me share with you another great quote from The Four Hour Work Week by Timothy Ferris.



*“It is your job to train those around you to be effective and efficient. No one else will do it for you.”*

In fact here is another quote from the Effective Executive along similar lines by Peter Drucker.

*“We have to extend the range of human beings through tools they have to work with rather than through a sudden quantum jump in human ability”.*

What I take away from these quotes is that you need to put in place a system in your business that ensures people are as effective and efficient as possible. Note here how I said effective **THEN** efficient. Why? Anyone can be efficient in what they are doing, including doing nothing but it is only tasks in which need to be done effectively that matter. These are the tasks that need to be done efficiently. Tasks that are ineffective don't really matter how they are performed now do they? So indentify the effective tasks and then do them efficiently, not the other way around in my books.

So how do you make members of your business more effective and efficient? Not surprisingly I am going to advocate the implementation of an internal SharePoint system. Why? Because in most cases you can simply put people in front of it and they will naturally find their way around. They typically won't have to ask anyone else. They won't be intimidated by what they see on the screen since it is simply a web page.

Let me give you what I think is a good example. Let's say you get a new staff member, a new receptionist in particular. Let's now say that one of their responsibilities is to get coffee for people every morning. The old fashioned way would be that the new receptionist has to firstly interrupt every other staff member and ask them what their coffee preferences are. They would then need to find and interrupt someone else who knew where to actually buy the coffees from. Now consider a business that uses SharePoint. It is the responsibility of every staff member to maintain their own coffee preferences in a SharePoint document. Also, in SharePoint is the procedure for buying coffee, that is, where to go, how to pay and so on. Now, all the new receptionist has to do is sit down in front of SharePoint run a search and find all the information they need. They then print off people's preferences and go to the shop with the order. Task complete.

Sure, this example may seem silly and trivial but it perfectly illustrates how SharePoint can improve productivity. No longer does everyone get interrupted for their coffee preferences and the new receptionist is effective from the time they arrive. Even better you could repeat the whole thing with a new receptionist every day and you'd obtain the same result. A small investment in documentation, even the most trivial of business processes, can pay huge dividends in your business.

Along the same lines consider all the external sources of communications you currently receive.

- Monitoring emails.
- Customer support requests.
- Supplier communications.
- Industry newsletters.



Wouldn't it be easier if all of these ended up in one common location in your business rather than scattered and duplicated between multiple email boxes?

Another practical example that I have implemented is the delivery of client SBS monitoring reports into SharePoint. What benefit does that provide you may ask? Once these emails are inside SharePoint they become searchable, they become "sortable" by client, it reduces inbox clutter and it also improves the ability to share the information. A further extension would be to implement some sort of workflow process around the contents of these monitoring reports. It may be possible to create a summary report listing all the major event log errors from all reports as an example. Using standard development tools I can see no reason why something could not be created that had the potential to reach into reports like these and act on the contents.

Now SharePoint's ability to read emails is far from perfect with the major issue being the inability to have a preview as you do in Outlook. As I have said previously, SharePoint is a great tool but it won't do everything!

Think of another source of communications you receive from outside your business, information from customers. Using something like SharePoint you could provide them with their own "portal" in which they could

- Get them to enter their own information.
- Get them to update their own information.
- Share private documents.

What I am talking about here is an Extranet. Is it so silly to reduce your work load by having customers enter and maintain their own information? Using the functionality of SharePoint you can open up a very simple two way channel where they could enter information along with your own team and everyone could see what is happening all the time. Another thought I had along these lines is a portal for ordering consumables. All the client has to do is log onto their SharePoint site, click their printer and an email alert could be sent to someone in your business telling them to place an order. The bottom line with all this is that the more work you can get someone else to do for you the greater your productivity.

There are many applications where SharePoint can be put to use within your business. From a CRM to a marketing tool, to employee portals and more. The key point is that SharePoint is a tool and therefore extremely flexible in adapting to your needs. It is a tool that can be used to capture business information. It is a tool that can be used to search business information which, combined with Search Server Express, can even be used to search information outside SharePoint.

So in summary, SharePoint is a tool that will lower your business expenses because

- It is free.
- It increases productivity.
- You can easily virtualize it using Virtual PC or the like.



- It is easily customized.
- It allows standardization via workflows.
- It allows staff to enter their own data.
- It allows customers to enter their own data.

I hope that I have been able to demonstrate how implementing SharePoint in your business will save you money. That means lower expenses and thus creating greater profits which is what we are all seeking for our businesses.

### Increasing Revenue

Now that I have successfully demonstrated how SharePoint can be implemented to reduce expenses let me turn your attention to ways in which I believe SharePoint can increase your revenues.

Don't forget that every customer you have is a business like yours. They have similar pain points. They have similar requirements of their customers, staff and vendors. If you can solve these common problems in your business then you can sell that expertise to your clients. Things like SharePoint templates allow you to sell the same solution over and over again. You can even sell a SharePoint implementation via a number of different methods, for example as an onsite solution or as a hosted solution. The reality is that you can sell SharePoint solution via a number of different means.

Everything you learn in SharePoint can be resold to customers. Is that possible with other technologies you have implemented in your business like managed services say? Yes, you may already have a great tool that helps your business but something like SharePoint can increase your revenues simply due to its flexible nature. Strangely enough there is a lot less customer resistance to products that are free. If you take the time to show a customer what SharePoint can do for their business I can guarantee that their eyes will light up when you tell the cost of the software (FREE).

Imagine that you do a SharePoint demonstration for a client and they love the product and just can't wait. In this case you can provide them with a hosted solution almost immediately. Even if the hosted solution is merely a trial, at least this way you can keep in the moment going with the client. Show me another product that can be implemented that quickly.

There is no doubt that SharePoint implementations always grow. Why? When people ask if they can have something the answer is generally yes. When they ask if they can have something else the answer again is generally yes. This is very positive attribute of SharePoint.

Beyond the standard SharePoint implementation, if your business has software development skills it is possible to write your own 'web parts' that can be plugged into SharePoint. Such 'web parts' also potentially enjoy the ability to resold to a worldwide SharePoint market.

Other revenue opportunities around SharePoint include:

- The ability to sell and implement Office 2007 upgrades and installations. SharePoint works with previous versions of Office but it works much better with the latest version.



- The heart of any SharePoint implementation is its database. For internal SharePoint deployments customers will require Windows servers and for large installations they may also require SQL Server installations.
- Personally I see SharePoint as a big driver for the upgrade to SBS 2008. From a client's point of view it is something tangible that you can show them that they will appreciate is different. There are many benefits of an upgrade to SBS 2008 but SharePoint is probably the easiest one to demonstrate to clients.
- All that time and effort you have invested in SharePoint can be utilized to train your customers on how to use the product to its best advantage. Don't forget that there is also training around utilizing existing Office products with SharePoint as well.
- As the use of SharePoint grows within a business it is clear that sooner or later they will want to have remote access to it, whether for staff or customers but you can bet your bottom dollar they will. Providing this access and ensuring that it is secure is certainly something the client is going to be willing to pay for once they appreciate the benefits SharePoint provides for their business.

So I now hope that I have been able to successfully demonstrate how SharePoint is able to make you money by increasing your revenue.

### Business Value

I think that one of the most powerful statements that I have read about business was in the E-Myth by Michael Gerber and it was:

*"there is ultimately only one reason to create a business of your own, and that is to sell it!"*

This goes back to my earlier point about whether you are in fact running a business or simply enjoying a hobby. When I started my business I never considered that I was going to sell it but years later I realized that I may need to and thus had to restructure. How many businesses out these days are constructed with this in mind? You don't have to sell it but even so, you should still structure your business so you can if the need arises.

The other shock to the system that most people find when they attempt to sell their business is that the buyer is not willing to pay what the owner thinks it is worth. You have to remember that the value of the business, or any asset for that matter, is in the eye of the purchaser.

My question to you is what is the value of your business now? If I said that I wanted to buy your business right now, how much would you sell it to me for? Is the price you are asking for appropriate? Does it represent the true value of the effort you have invested in it or it is overvalued?

Ok, you may have a figure in your head but consider whether as an outsider you would buy your business. Does it represent an investment? Are all the processes and procedures documented? Where is the value of the business stored? In the heads of the employees and the business owner or written down somewhere? These are hard questions and may result in painful answers but they are the reality



of the situation. I know this because some time ago I had to start asking myself these very questions and the answers I assure you were not pretty.

Speaking of the “value” of a business here is another great quote from the E-Myth:

*“The value of your equity is directly proportional to how well your business works. And how well your business works is directly proportional to the effectiveness of the systems you have put in place, upon which the operation of your business depends”*

It all comes down to the effectiveness of the systems you have in place in your business. Can you tell me what systems you have in place in your business? Are they effective?

So how does SharePoint fit into all this? Well, SharePoint is a way to capture business information and therefore increase the value of your business because it documents it. SharePoint is also an easy way of transferring or selling this information if you want. If someone wants to buy your business and most of the information is in SharePoint you can simply back up the data and give it to them. Also importantly, you can choose to easily sell part of this value with SharePoint.

If you remember, previously I spoke about the fact that I maintained three internal wikis in my business. One of these was all of the technical information that I had learned over the years. If I am focused on running a business, as we have previously discussed, then I am keen to extract as much profit as I can from my business and my knowledge. There is huge amount of value held in the technical information we all hold in our heads. But guess what? It isn't worth a dime if that's where it stays! I have already taken the first step by documenting the information into SharePoint now what's to prevent me from selling that knowledge? I could set up a subscription services to give others access to just this technical SharePoint wiki or I could backup just this wiki and give someone the file. Because I have taken the time to keep confidential data away from my technical wiki I can therefore make it available, for a fee of course, to others. A good illustration how a tool like SharePoint and some forward thinking can improve your bottom line.



## Information leaves the business

Consider your business as a container for value. Into it you add not only your own knowledge but also the knowledge and experience of your employees. All this contributes to the value of your business. Now what happens each night when your employees go home? Does that knowledge go home with them as well? Worse still, what happens if these employees leave your business? In most cases they take their knowledge and experience with them. Thus, the value of your business decreases.



## Information remains in the business



Now consider what happens when you implement a tool like SharePoint in your business specifically to capture this information. All that knowledge and experience you and your employees bring to your business should be documented and there is no better place to do it than in SharePoint. So with all this knowledge, experience, policies and procedures documented in your “system” the value of your business increases. No longer does it decrease when employees go home for the day or leave the business. In fact, the value of the business keeps growing simply because you have implemented a system to capture and save this information.

A business that looks orderly:

- says to your customer that your people know what they're doing.
- says to your people that you know what you're doing.
- says that while the world may not work, some things can.
- says to your customers that they can trust in the result delivered and assures your people that they can trust in their future with you.
- says that structure is in place.

This is once again from the E-Myth by Michael Gerber. SharePoint brings order to a business because it captures all sorts of ‘ad hoc’ information. It is a central location for documents, lists, knowledge, databases and so on. It is a central location for business and customer information and with the addition of workflows provides a consistency to this information. Can I ask you whether you have such systems already in place in your business? If you don’t then I hope you can see the fact that SharePoint can not only reduce your expenditure, increase your revenues but also greatly enhance the value of your business.

### Opportunities

There are some further opportunities around the SharePoint product that I’ll briefly mention. The Windows SharePoint product is free from Microsoft but don’t forget that it is very much the basis for Microsoft Office SharePoint Server (MOSS).

*“According to Bill Gates, SharePoint is the fastest-growing server product Microsoft has ever had and the company is going to dedicate more resources to the product. The company expects to have sold 100 million licenses by July this year, he said”. – Infoworld March 2008*

Remember that the above figures only represent licenses sold for the MOSS product I’m sure. When you factor in the growth of Windows SharePoint Services you have a product that is growing substantially faster than most other IT products.

Now doesn’t it make more sense to be looking to get into a product that is not only growing this fast but is also one in which many people profess an utter ignorance? It certainly does to me. However, I believe it also highlights another opportunity. Since Windows SharePoint technology makes up the bulk of technology for MOSS it means that is directly transferable to MOSS. To me, this means that, with a little



more learning, you are able to sell your SharePoint skills into the MOSS market which is typically enterprise based. We all know that enterprise customers have much bigger purse strings and probably represent a greater revenue opportunity going forward than individual SMB customers.

Beyond that, it is possible to further differentiate yourself by learning tools like SharePoint Designer that allows you to customize SharePoint sites. Again, remember that anything developed for one SharePoint site will normally be applicable to other SharePoint sites.

Yet another opportunity is integrating existing applications into SharePoint. For example, it is my understanding that now Crystal Reports comes with a SharePoint web part that allows you to display reports directly in SharePoint. The scope for creating management tools like dashboards in SharePoint is immense and is, I believe, something very relevant to management. That is, the people who sign the cheques.

A few further suggestions I have to help you drive SharePoint business would be firstly to provide your local community organizations or sporting teams a 'free' hosted SharePoint site. They could use it to help them organize times and people. Microsoft even has a free template you can download and use. Chances are, once people see how simply and easy SharePoint is to use they'll want it in their business. On the flip side it will also give you plenty of experience in maintaining a real live working SharePoint site.

Most business owners I have met are focused on blocking the 'evils' of the Web 2.0 technology like My Space and Facebook. My response is that no matter what you do people are going to find ways around whatever obstacle you throw in their path. Why not redirect that creative energy into something that adds value to the business? Give them the task of creating a SharePoint site to perform some task. Give them their own SharePoint sub site. I can assure you that you'll be surprised at the results. Firstly, it gets the employee to create something valuable for your business and secondly it makes the employee feel they are learning and contributing to the business. That means a happier boss and happier employee in my books.

Lastly, if you want to promote the fact that you do SharePoint work then why don't you get a public SharePoint site up and running? It really doesn't take that much. You can even host it a virtual platform to get started. At least that way you'll gain valuable experience into creating external access as well as demonstrating that you do know SharePoint.

### Key Points

So in summary there are number of key points that you should take away from this presentation:

- SharePoint is simply a tool. Don't try and sell it using the collaboration word, customers just don't understand. Tell them it is exactly like other technology tools they already use in their business.
- SharePoint is the fastest growing Microsoft server technology. Both Windows SharePoint and MOSS are key technologies in Microsoft's forward strategy. They also run on just about every Windows Server platform as well as hosted in the cloud.



- Windows SharePoint is FREE. Once you show a customer all the features and tell them that the product is FREE I'm pretty sure you'll have their interest. This greatly reduces the resistance to any SharePoint implementation.
- SharePoint is a way to decrease expenditure and increase revenue. If you only use SharePoint in your business it is going to generate you more profit and I hope I have been able to demonstrate that successfully.
- SharePoint is a way to capture your business value. Remember you should be increasing the value of your business everyday with the aim to make it as attractive as possible for someone to buy it from you. SharePoint is an easy way to help you achieve this.

Finally, I strongly believe that if you aren't using SharePoint then you can't sell it. There are few barriers to getting involved with SharePoint and yet most businesses I come across simply ignore it. I think that is great because it means more opportunity for me. If I have done my job properly then I would hope that you too can also see the major benefits and opportunities that abound in and around this product. Whether you chose to investigate that opportunity is now up to you.

I thank you for your time and the opportunity provided by SMBNation to present this to you. If you have any further questions please feel free to contact me via [director@ciaops.com](mailto:director@ciaops.com) or my blog at <http://supportweb.ciaops.net.au/blog>.

I wish you every success in your business.



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### ***Company - Computer Information Agency ( [www.ciaops.com](http://www.ciaops.com) )***

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