Governance Planning for Intranets and Viva Connections

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Overview

- This presentation provides high-level guidance for governance planning for your intranet and Viva Connections.
- The approach discussed is described in detail in a workbook that is updated regularly to include key governance decisions related to intranets configured in Microsoft 365:
  [http://tiny.cc/M365GovQuestions](http://tiny.cc/M365GovQuestions)
Typical Intranet Governance Plan
and results in the wild, wild west
Governance needs to be consumable to get ...
... business results
This means that the way we approach governance needs to be delivered in the flow of work.
Governance alone is not enough.
The recipe will need to be adapted
Governance is about balance
Governance should be one of the first things you think about when you are planning your intranet ...
... especially when your intranet is delivered in Teams with Viva Connections and your KM goals are enabled by Viva Topics.
Understand, create, deliver

Create the governance content

Understand what needs to be governed

Deliver when and where it is needed
Understand what needs to be governed
**Intranet governance topics**

<table>
<thead>
<tr>
<th>Topics</th>
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<tbody>
<tr>
<td><strong>Vision</strong></td>
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<tr>
<td>Policies and guidelines</td>
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<tr>
<td>Provisioning and decommissioning</td>
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<tr>
<td>Information architecture and search</td>
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<tr>
<td>Content management and delivery</td>
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<tr>
<td>Target audiences ★ (especially important for Viva Connections)</td>
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<tr>
<td>Branding</td>
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<tr>
<td>Security and information life-cycle management</td>
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<td>Roles and responsibilities</td>
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<td>Feedback</td>
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<tr>
<td>User training ★</td>
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<tr>
<td>Measurement, monitoring, and change management</td>
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</table>
Governance based on reach:

- Home Site
- Organizational News Sites
- Functional Portals and Hubs
- Divisional/Regional Portals and Hubs
- Topic-specific Microsites
Put the right team together: small, inclusive, empowered – include business and IT representatives
“If you can’t feed a team with two pizzas, it’s too large.”

Jeff Bezos, Founder of Amazon
Schedule meetings to work through governance decisions

Use this workbook to review and document the key questions and decisions that you need to discuss!

http://tiny.cc/M365GovQuestions
# Governance Framework Meeting Topics

<table>
<thead>
<tr>
<th>Date</th>
<th>Typically requires two meetings</th>
<th>May require more than one meeting</th>
<th>May require more than one meeting</th>
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</table>
| Topic | Scope  
- "Up front" SharePoint, OneDrive, and Teams governance  
- "Up front" general governance | Roles and Responsibilities about  
- Compliance  
- Themes and Designs  
- IA | Records and Retention  
- Individual Content: User Profile and OneDrive | Yammer  
- Power Apps, Power Automate, and other services  
- Standards and guidelines for customization |
| Key Goals | Establish framing governance  
- Key decisions:  
  - Provisioning  
  - Naming conventions  
  - Guest Access  
  - Internal Access  
  - Sharing  
  - Compliance  
  - Security and privacy  
  - Microsoft Viva  
  - Target Audiences | Define key roles for the organization, identify roles that may need to be added or up-skilled.  
- Training and expectations for each role. | Define guidelines for detailed enterprise decisions.  
- Define key expectations for IA and site designs, including themes and brand compliance.  
- Team collaboration governance. | Understand how records and retention requirements impact content management, IA, site creation and decommissioning, and compliance. | Define expectations and content requirements. | Define expectations and responsibilities. | Determine guidelines for Power Apps and Power Automate  
- Determine what approaches and standards need to be established for customizations to SharePoint (particularly for contracted development teams). |
| Who attends? | Governance Core Team  
- Governance Core Team (may need input from HR re: job descriptions)  
- Governance Core Team + Comms Team (if there is no Comms rep already on the Governance Core Team)  
- Governance Core Team + Team responsible for Records Management | Governance Core Team + Comms + HR + (possibly) Legal | Governance Core Team + Service Owners for Yammer + Possibly: Legal and HR | Technical members of the Governance Core Team + key IT development leaders |
What’s in the workbook?

- Suggested meeting schedule and participants
- Questions organized by topic
- Screenshots of the Admin Center settings
- Links to resources where you can learn more
- Considerations and options
- Place to record the decision
- Place to record where users will learn about the decision, how to apply it, and where it matters

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### Provisioning

<table>
<thead>
<tr>
<th>Key Governance Question</th>
<th>Decision/Accept</th>
<th>Reference (to governance/training context)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who can provision new Microsoft 365 Groups? (one answer applies to multiple services)</td>
<td></td>
<td></td>
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<tr>
<td>- see previous page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Options</td>
<td></td>
<td></td>
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<tr>
<td>• Open (default): Users can create their own groups as needed without needing to wait for IT</td>
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<tr>
<td>• IT-led: Users request a group from IT</td>
<td></td>
<td></td>
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<tr>
<td>• Controlled: Group creation restricted to specific people, teams, or services. (See settings where you can create Microsoft 365 groups)</td>
<td></td>
<td></td>
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</tbody>
</table>

Who can provision non-group connected SharePoint sites? (Setting includes the location for where sites are provisioned as well as the time zone and default storage limit for new sites). Setting also allows you to control the various places where sites can be created. These settings are enabled by default.

Settings: SharePoint Admin Center > Settings > Site Creation

Uncheck all boxes if you do not want end users to create communication sites from the SharePoint start page or team sites from OneDrive.

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The workbook includes big decisions as well as the knobs and dials you can turn
Viva Connections governance adds some new-ish decisions

- What audiences do we need?
- Who manages the creation of audiences?
- How will audiences be maintained?
- Who can create an app?
- Who decides which apps and content can/should be targeted to which users?
Viva Topics governance adds additional decisions

Which sites are included/excluded for Topic discovery?

When can users see a Topic – at which stage of the life-cycle?

Who can edit topic pages – open to all or only knowledge managers?

Structure of topic pages – “out of the box” or with “custom extras”?

Editor training – how much curation, what to curate?

How will we report on the impact of Viva Topics?

What name do we want to give to the topic center?

Learn more: Plan for Microsoft Viva Topics
Microsoft Teams has specific governance decisions

Learn more: Plan for governance in Teams

- Who can create a Team (and Viva Engage community)?
- Does your organization require a specific naming convention for Teams?
- Do you have specific templates that you want to use for Teams?
- Do Team creators need the ability to assign organization-specific classifications to Teams?
- Do you need to restrict the ability to add guests to Teams on a per-team basis?
- Do you want to implement expiration policies for inactive Teams?
- Do you have guidance about what content and conversation should be in Teams?
...and responsible AI means thinking about governance too

- Do we need a Copilot “responsibility contract” for our employees?
- Do we need to clarify the potential risks of sharing sensitive personal or corporate data in prompts—and provide explicit guidelines?
- Do we need to ensure disclosure when content is substantially AI-generated?
- Think about guidelines that align with your corporate purpose and values.
Good governance and good information architecture go together
Build governance into your site designs
Equip your employees with the know-how and confidence they need to be successful ...
... and a Champions community

Peer-to-peer relationships help increase digital literacy
Create the content
Governance content includes ...

- **Policies**
  - Build into site designs and templates
  - Automate with settings the Admin Center

- **Guidelines**
  - Automate validation where possible
  - Support with education
  - Remind in context

- **Roles and Responsibilities**
  - Add to job descriptions and performance goals
  - Review regularly
Roles and Responsibilities

- Should be part of job descriptions and performance goals
- Make it easy for people to learn about a role before they commit
- Not every role is full time; not every role needs to be done by a different person
Deliver when and where people need the information
Deliver in a Resource/Success Center

- SharePoint communication site
- Education and governance content in one place
- Content grouped by “topic,” “service,” and role – to encourage discovery (metadata)
- Optionally connected to Microsoft Learning Pathways for training (or start with Learning Pathways)
- Embed your community for M365 Champions
- Use News to promote new content
How is it created?

- Communication site (small number of editors, large number of readers)
- Multi-column sections
- Highlighted Content to roll up related content using page properties
- Anchor links (on-page bookmarks) for a “table of contents” on each page
Deliver “just in time”

- Add a custom app to the app launcher: https://learn.microsoft.com/microsoft-365/admin/manage/customize-the-app-launcher
- Add a custom help link in Org settings in the Admin Center
- Integrate into custom playlists in Microsoft 365 Learning Pathways
- Add a page link to the Topic Center
- Make a custom card in Viva Connections
- Consider third-party tools
Talk about it! Communicate and promote!
Key Take-aways

- Governance is key to intranet success – and Viva Connections!
- Plan governance first – in the context of your business outcomes and environment
- Include a plan to measure and monitor
- Consider roles and responsibilities – and aligning with job descriptions
- Engage your champions and include training
- Don’t deliver as a doorstop document – deliver just-in-time
- Promote, promote, promote!
Susan Hanley

- Information Architecture
- User Adoption
- Governance
- Metrics
- Knowledge Management
- Intranets & Collaboration Solutions

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www.computerworld.com/blog/essential-sharepoint
Resources

- Microsoft 365 Governance Questions: http://tiny.cc/M365GovQuestions
- Planning intranet governance - SharePoint in Microsoft 365 | Microsoft Docs
- Plan for governance for collaboration and Teams
- Plan for Microsoft Viva Topics