

Governance Planning for Intranets and Viva Connections

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MVP, Viva Wizard (specializing in intranets)

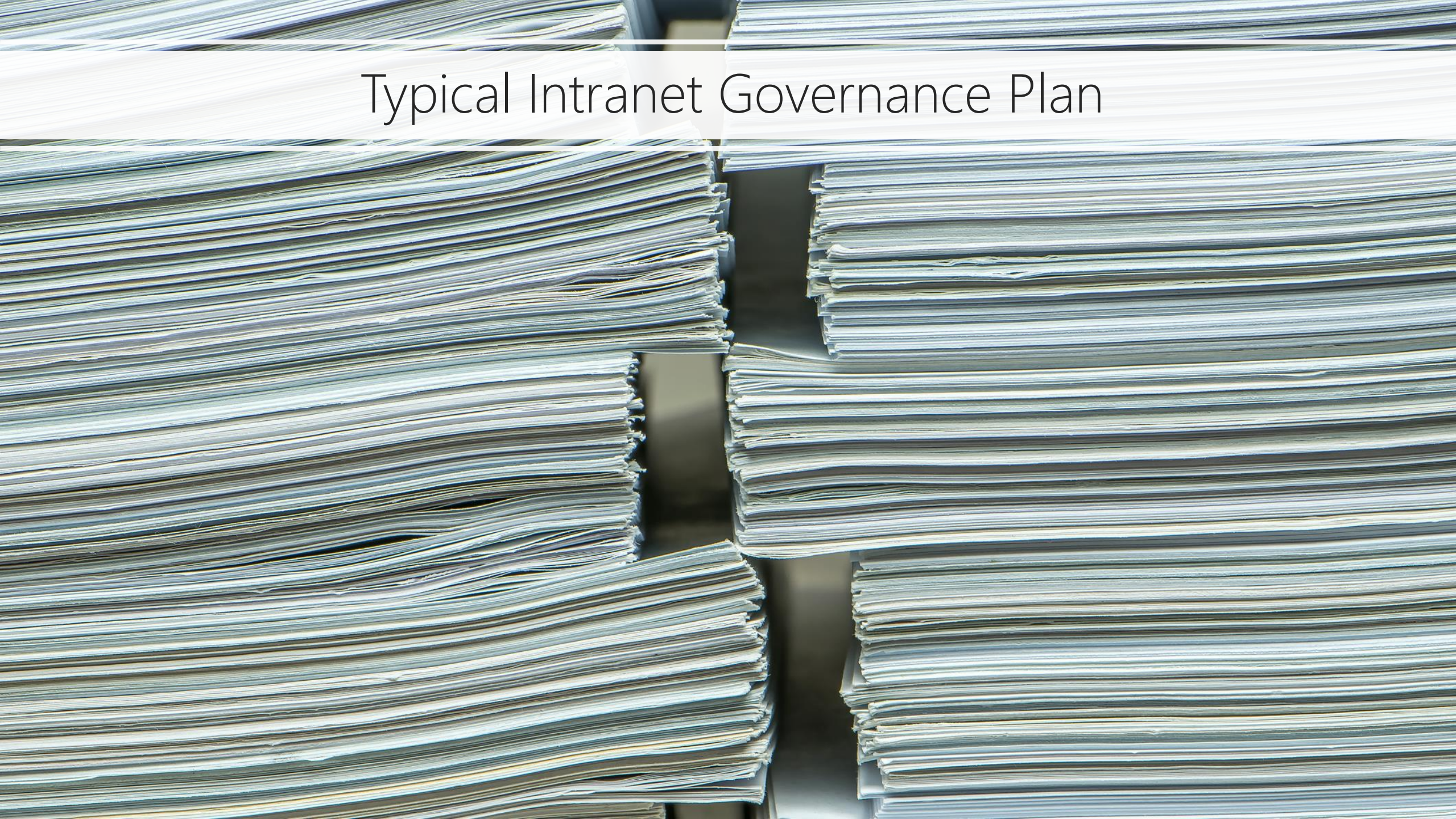


Overview

- 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>

Typical Intranet Governance Plan











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SMELLER

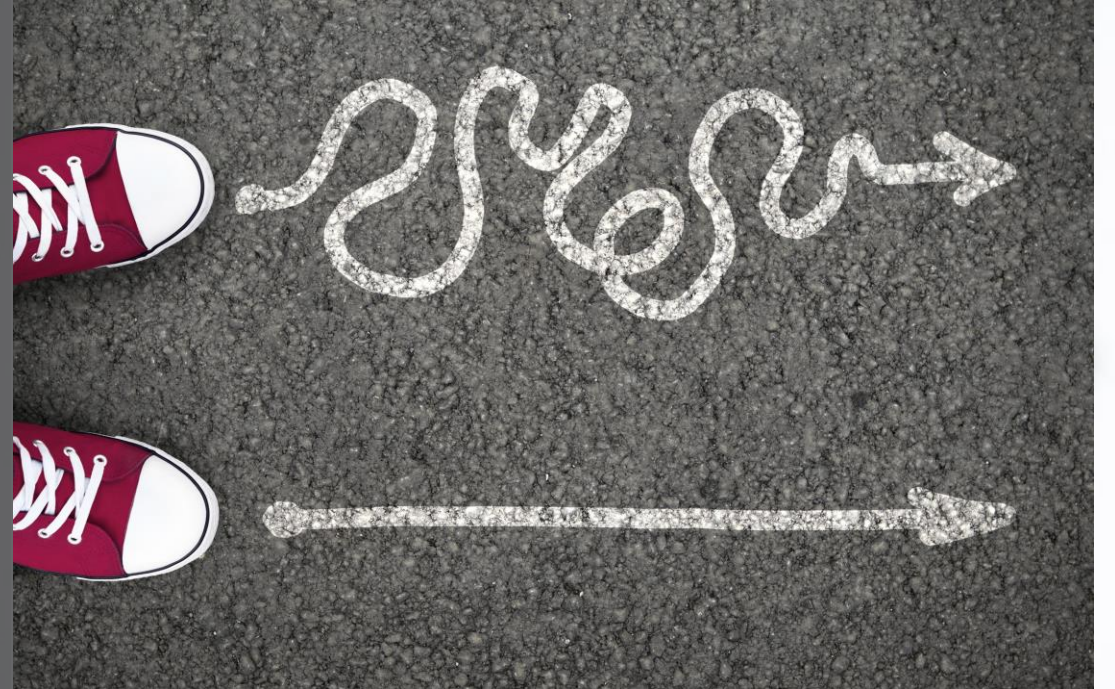


Governance needs to be consumable to get ...

... business
results



This means that the way we approach governance needs to be delivered in the flow of work





Governance alone
is not enough

Governance

+

Training

+

Adoption





Governance is about balance

The background of the image is a close-up, slightly blurred view of a notebook's pages. The pages are covered with numerous colorful sticky notes in various colors including yellow, green, blue, pink, and orange. The text is centered over this background.

Governance should be one of the first things you think about when you are planning your intranet ...

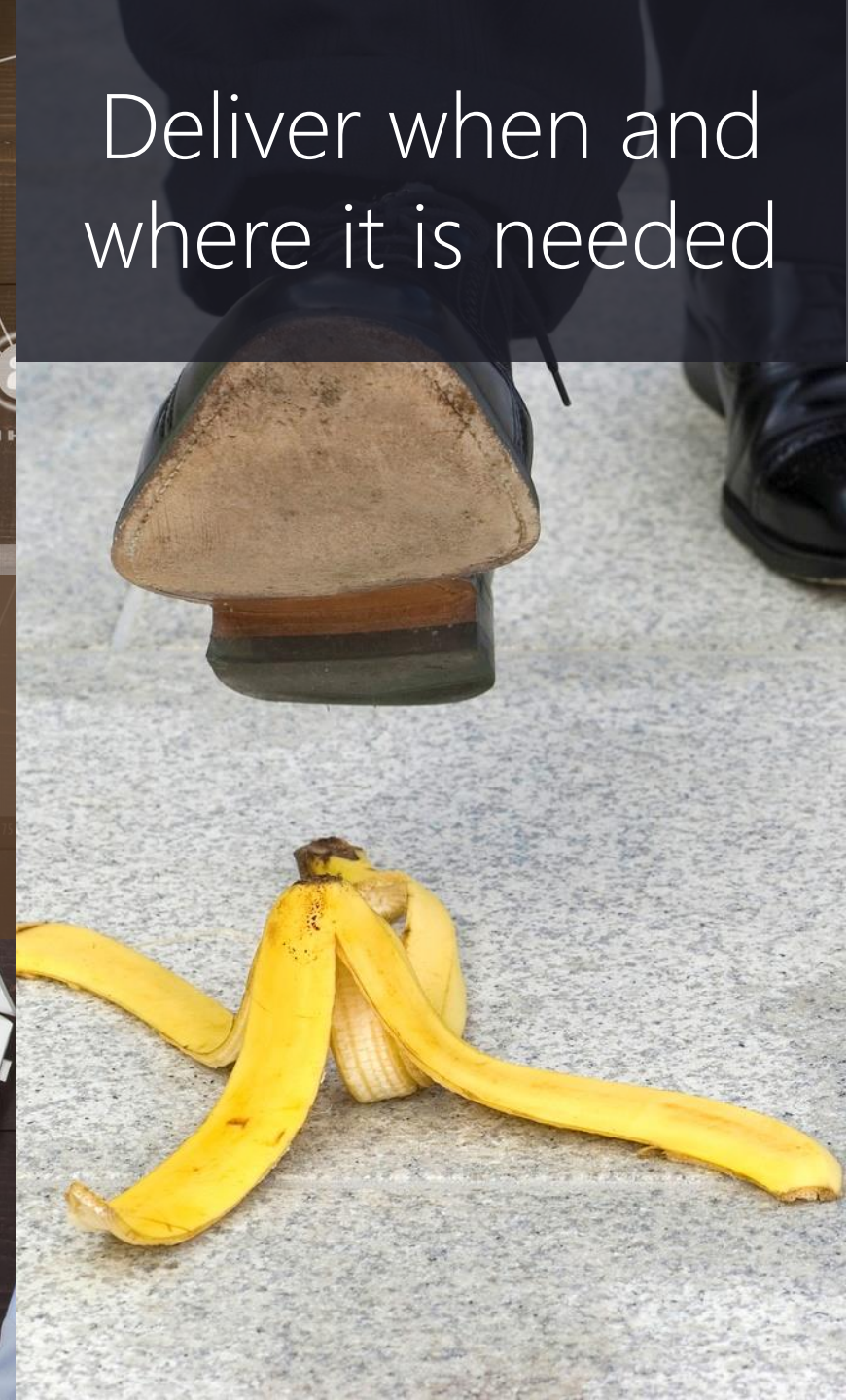


... especially when your intranet is
delivered in Teams with Viva
Connections
and your KM goals are enabled by
Viva Topics

Understand, create, deliver



Deliver when and where it is needed



Create the governance content



Understand what needs to be governed



Understand
what needs to
be governed

Intranet governance topics

Vision

Policies and guidelines

Provisioning and decommissioning

Information architecture and search

Content management and delivery

Target audiences ★ (especially important for Viva Connections)

Branding

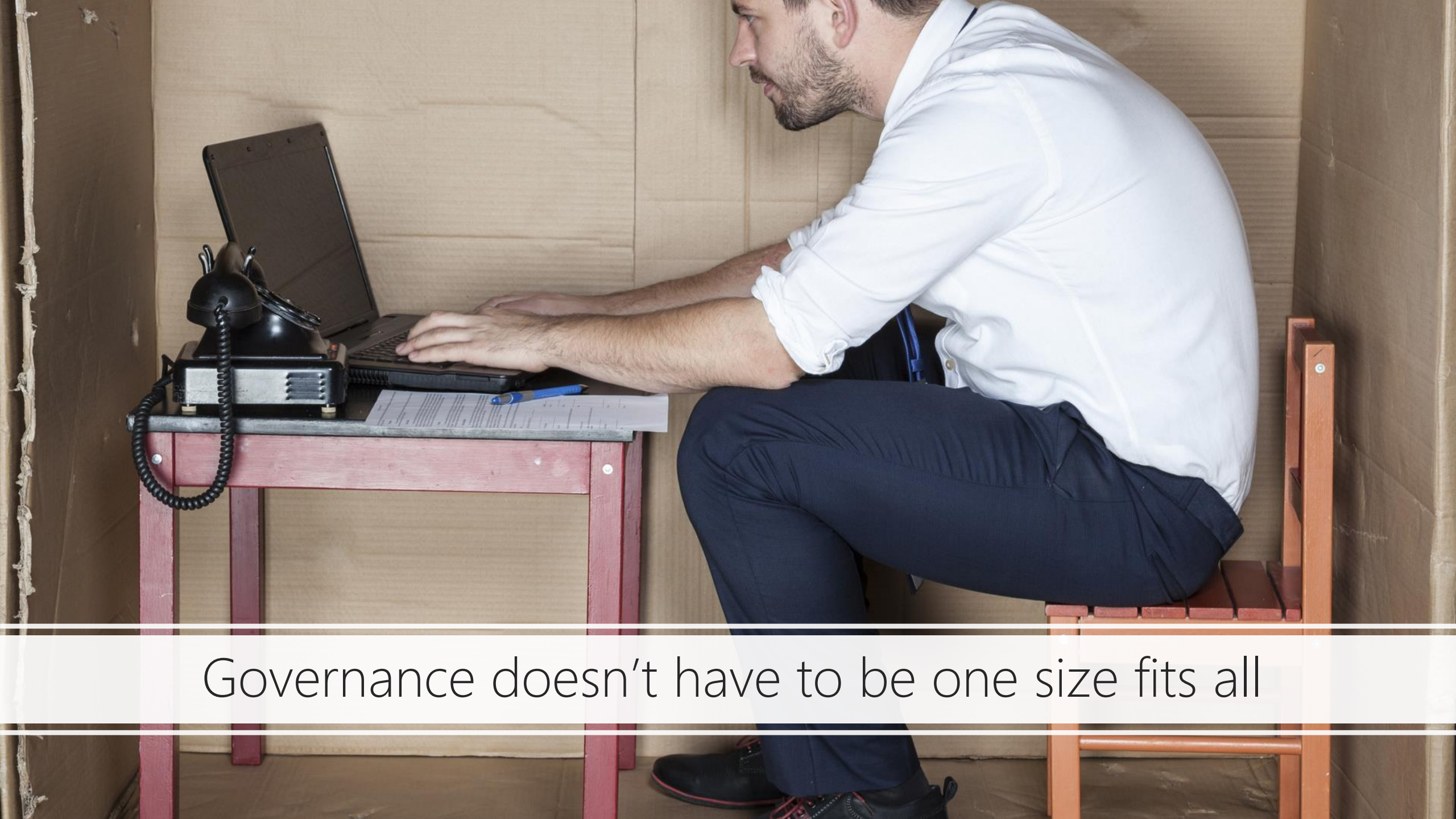
Security and information life-cycle management

Roles and responsibilities

Feedback

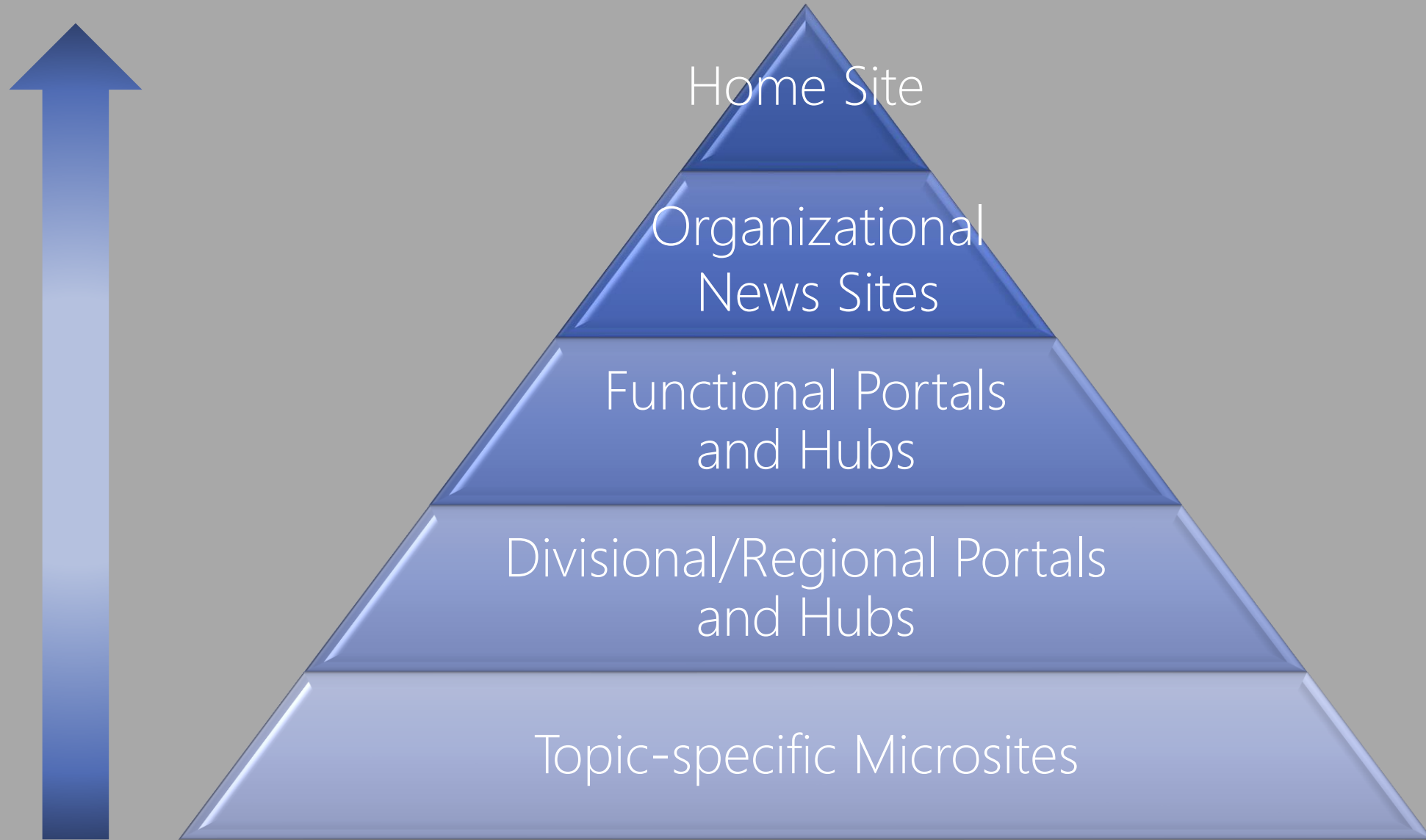
User training ★

Measurement, monitoring, and change management



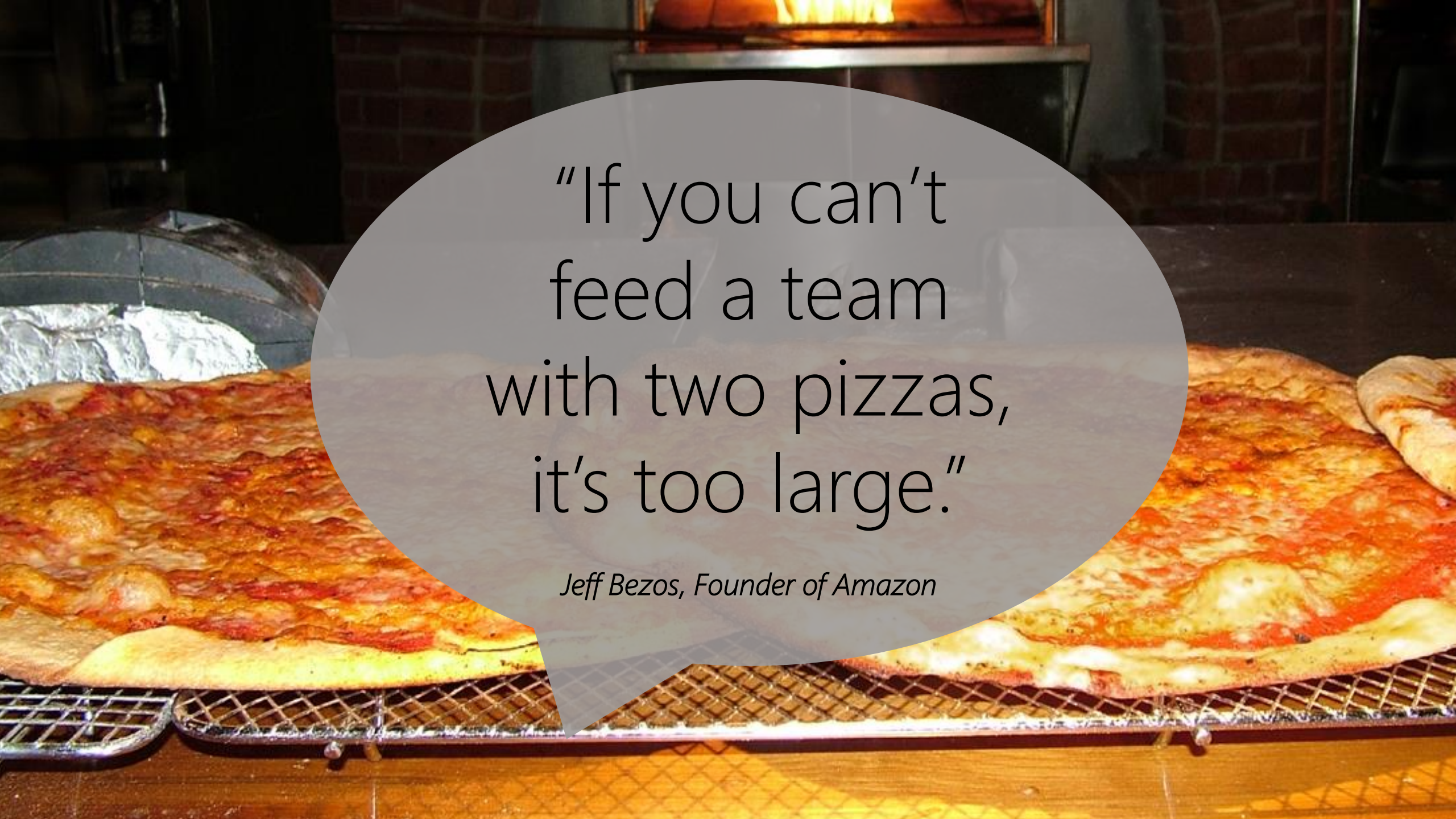
Governance doesn't have to be one size fits all

Governance based on reach





Put the right team together:
small, inclusive, empowered – include
business and IT representatives

A large pizza is being cooked in a brick oven. The pizza is on a metal mesh tray and is covered in melted cheese and tomato sauce. The oven is made of dark bricks and has a glowing fire in the background. A semi-transparent grey oval is overlaid on the center of the image, containing a quote.

“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

	Overview and Key Decisions	Roles and Responsibilities	Enterprise Decisions	Records and Retention	Individual User Content	Enterprise Social	Development and Ops/Other Services
Date	Typically requires two meetings		May require more than one meeting				
Topic	<ul style="list-style-type: none"> Scope "Up front" SharePoint, OneDrive, and Teams governance "Up front" general governance 	Roles and Responsibilities	Detailed decisions about <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Provisioning Naming conventions Guest Access Internal Access Sharing Compliance Security and privacy Microsoft Viva Target Audiences 	<ul style="list-style-type: none"> Define key roles for the organization. Identify roles that may need to be added or up-skilled. Training and Expectations for each role. 	<ul style="list-style-type: none"> 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 de-commissioning, and compliance.	Define expectations and content requirements.	Define expectations and responsibilities.	<ul style="list-style-type: none"> 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?

Provisioning

Key Governance Question	Decision/Answer	Reference (in governance/training content)
<p>Who can provision new Microsoft 365 Groups? (one answer applies to multiple services – see previous page)</p> <p>Options</p> <ul style="list-style-type: none">• Open (default): Users can create their own groups as needed without needing to wait for IT• IT-led: Users request a group from IT• Controlled: Group creation restricted to specific people, teams, or services. (See Manage who can create Microsoft 365 Groups)	<p>To manage who can create Groups, the admin who configures group creation settings and the members of the who are allowed to create groups need Azure AD Premium licenses or Azure AD Basic EDU licenses. People who are members of groups and don't have the ability to create other groups do not need these licenses. (included in M365 F1, F3, E3, E5)</p>	
<p>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.</p>	<p>Uncheck all boxes if you do not want end users to create communication sites from the SharePoint start page or team sites from OneDrive.</p>	

Setting: SharePoint Admin Center > Settings > Site Creation

Site creation

Select settings for new sites. [Learn more](#)

- Users can create SharePoint sites
Control whether users can create sites from SharePoint, OneDrive, the PnP PowerShell cmdlet, and the REST API. This setting doesn't affect whether users can create teams or Microsoft 365 groups and their connected sites.
- Show the options to create a site in SharePoint and create a shared library from OneDrive

Create team sites under
https://contoso21.sharepoint.com/sites/

Default time zone
UTC-08:00 Pacific Time (US and Canada)

- 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



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

Learn more: [Plan for Microsoft Viva Topics](#)

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?

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?

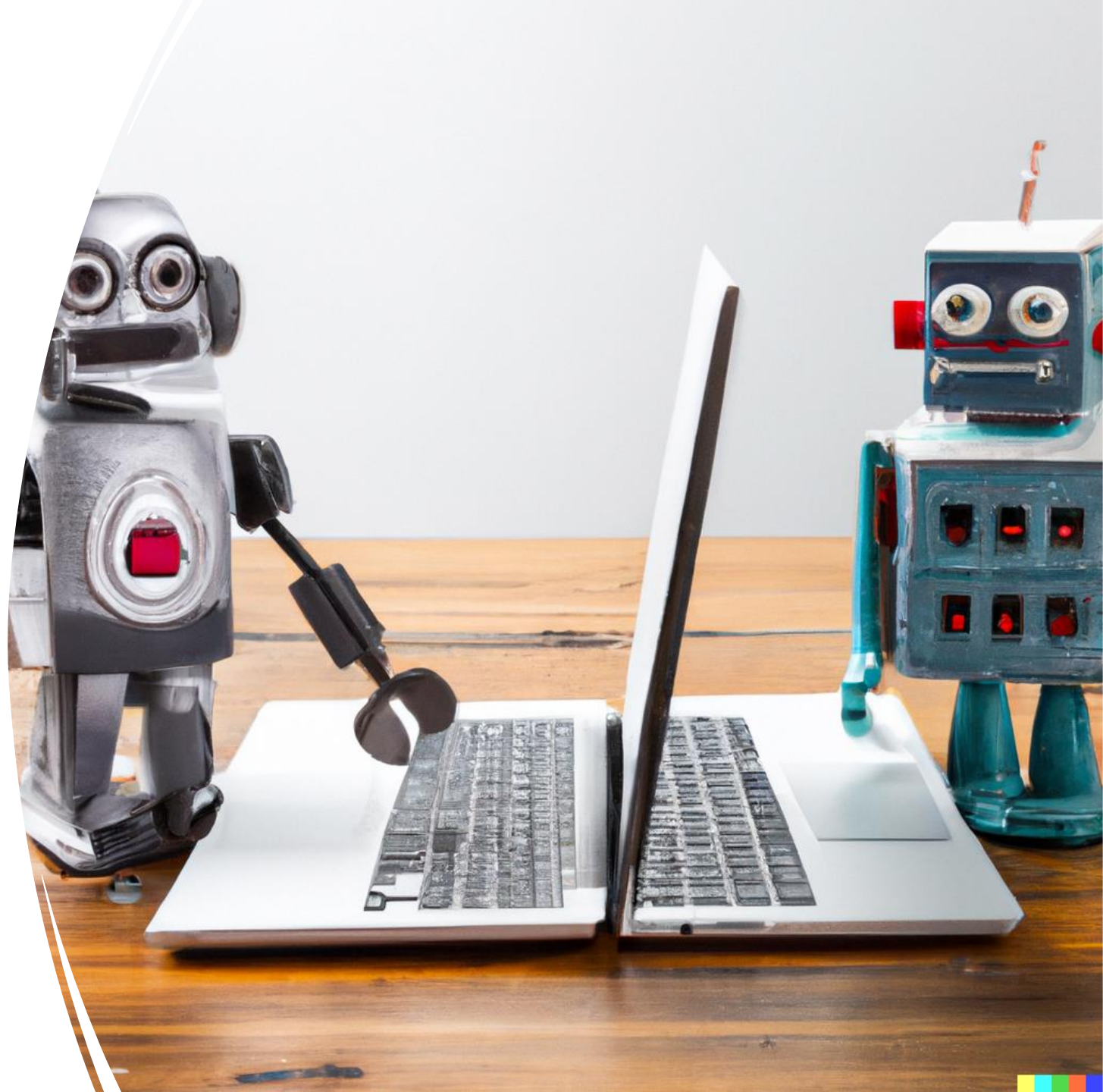
Do you need to restrict the ability to add guests to Teams on a per-team basis?

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

A close-up, shallow depth-of-field photograph of a person's hands typing on a silver laptop keyboard. The background is heavily blurred, showing what appears to be an office environment with greenery and other people. The lighting is soft and natural, suggesting an indoor setting with large windows. The overall mood is professional and focused.

Equip your employees with the
know-how and confidence
they need to be successful ...

A group of approximately 15 people, silhouetted against a warm, orange-hued sunset sky, are standing on a rooftop or high vantage point overlooking a city skyline. They are all raising their right fists in a gesture of triumph or solidarity. The scene is backlit by the setting sun, creating a strong glow around the figures and the text.

... 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

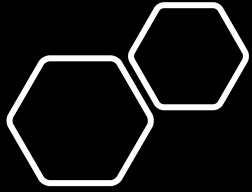
A young boy with short brown hair, wearing black-rimmed glasses and a blue and white striped scarf, stands with his arms crossed. Behind him is a white chalk drawing of a pair of wings on a grey background.

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

Document life-cycle - where should I store my files?

Overview | Key principles | Where should I store my files? (diagram)

Overview

For many files, the creation process follows a common pattern.

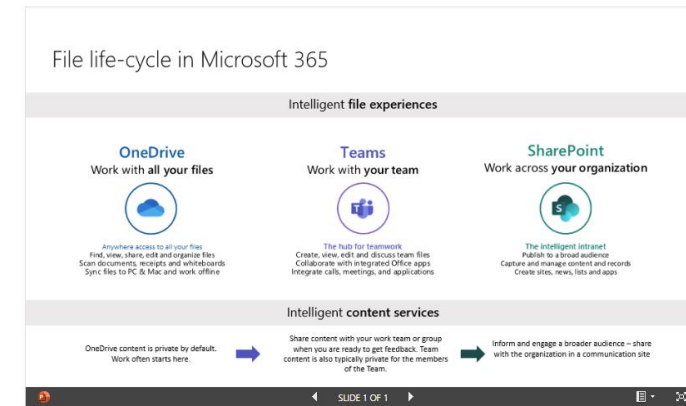
- I create a copy for myself.
- I get feedback from one or more people - or maybe my entire team.
- I publish the file so others can have access.

Nothing has to change about that pattern when you work with your files in Microsoft 365 - but of course *how* you share the file makes a big difference in terms of how much work you will have to do when you process feedback from others and publish the document so that others can read it.

Key principles

- **Don't send attachments to share files** inside the organization - **always send a link**.
- **Choose the appropriate type of link when you share a file** - take a look at [Tips for Sharing Files - to prevent "over-sharing"](#) to make sure that you are selecting the right type of link. Remember - you can choose to allow editing or not.
- **Turn on "track changes"** for Word documents to easily see the edits made by others.
- **When you are finished editing your document, move it to the desired location** - don't copy it. This will ensure that only one copy of a document is found in search. If you want to make major edits to a published document, you can make a temporary copy in your OneDrive library and then move it back to the target location, over-writing the currently published version, when you are finished. Learn how to [move or copy a file from OneDrive or SharePoint](#). Note that when you move a file from OneDrive that you have shared with others, you can choose to keep sharing with collaborators when you move this file or folder. This means all users who had original access to a file will be re-added to it if that file changes shared library locations. Those users will receive a new link maintaining the same permissions they had before and receive a notification about the move. "Move and keep sharing" is unchecked by default.
- Follow [File and Document Naming Recommendations](#) to ensure that links to your files are maintained when the file is moved or updated.

Where should I store my files?



Related Content

Title	
	Document life-cycle - where should I store my files?
	File and Document Naming Recommendations
	How to restore deleted documents
	Organizing Files with Metadata
	Upload a File or Document

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



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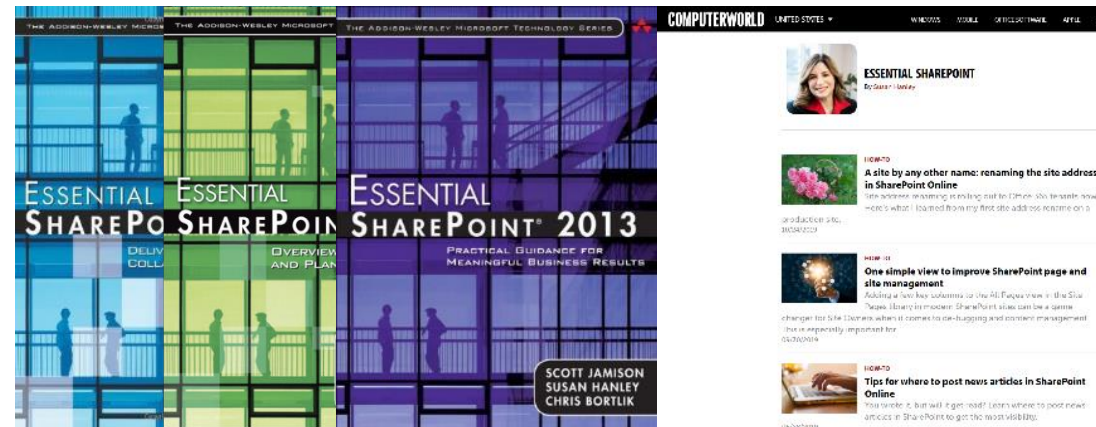
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 www.susanhanley.com

 www.computerworld.com/blog/essential-sharepoint



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



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](#)