

SharePoint Optimization Guide

At Odyssey Partners, we believe that a well-optimized SharePoint environment is the cornerstone of effective collaboration, streamlined processes, and improved business outcomes. We partner closely with our clients to assess, enhance, and transform their SharePoint platforms, ensuring they align with organizational goals and deliver measurable value. Through a tailored approach, we identify opportunities for optimization, resolve existing challenges, and leverage modern tools and best practices to create a seamless and efficient SharePoint experience.

Whether you're looking to improve performance, simplify information architecture, or enhance user adoption, Odyssey Partners is committed to guiding you every step of the way. You can take the following steps to optimize your SharePoint environment, or we can help you.

1. Assess Current SharePoint Environment

- **Site Audit:** Identify all active sites, subsites, and document libraries.
- **Usage Analysis:** Determine user activity, storage usage, and content relevancy.
- **Performance Evaluation:** Check page load times, indexing issues, and broken links.
- **Permissions Review:** Analyze user roles, permissions, and security settings.

2. Improve Information Architecture

- **Simplify Site Structure:** Reduce complex hierarchies; consolidate redundant subsites.
- **Metadata and Taxonomy:** Implement consistent metadata and content types to improve findability.
- **Content Hub Management:** Centralize management of shared content types.
- **Navigation Optimization:** Use global and local navigation for intuitive user experience.

3. Enhance Performance and Speed

- **Optimize Page Design:** Minimize web parts, avoid heavy custom scripts, and use modern pages.
- **Enable CDN:** Utilize Content Delivery Networks (CDN) for faster asset delivery.
- **Indexing and Search Optimization:** Ensure proper content indexing and leverage search refiners.
- **Monitor Storage Quotas:** Optimize large libraries with folders and archiving policies.

4. Governance and Security

- **Set Governance Policies:** Define ownership, approval workflows, and lifecycle rules for sites.
- **Data Security:** Enforce security rules, multi-factor authentication, and external sharing policies.
- **Compliance Standards:** Implement retention policies and ensure GDPR compliance.
- **Monitoring Tools:** Use Microsoft 365 admin tools to monitor activity and address risks.

5. Automation and Workflow Streamlining

- **Leverage Power Automate:** Automate repetitive tasks like approvals, notifications, and file handling.
- **Optimize Workflows:** Replace outdated SharePoint Designer workflows with Power Automate flows.
- **Integrate Power Apps:** Develop forms and solutions to improve business processes.
- **Alerts and Notifications:** Configure automated alerts to enhance collaboration.

6. Improve User Experience (UX)

- **Modernize Pages:** Transition from classic to modern SharePoint experiences.
- **Branding and Themes:** Apply consistent branding using site themes and headers.
- **Mobile Optimization:** Ensure responsive design for mobile users.
- **Adopt Hub Sites:** Connect related sites for unified navigation and search.

7. Search Optimization

- **Refine Search Experience:** Enable metadata-based search refiners.
- **Customize Search Schema:** Ensure important fields are indexed for better search results.
- **Promote Key Content:** Use bookmarks and promoted results for key searches.
- **Search Analytics:** Monitor search trends and optimize based on user activity.

8. Training and Adoption

- **End-User Training:** Conduct training sessions on document management, permissions, and workflows.
- **Adoption Campaigns:** Promote SharePoint benefits with internal marketing.
- **Feedback Loops:** Encourage user feedback to address pain points and improve adoption.
- **Champion Programs:** Identify and train power users to support adoption.

9. Monitoring and Continuous Improvement

- **Analytics and Insights:** Use SharePoint Site Usage Reports to monitor performance and adoption.
- **Regular Audits:** Schedule quarterly reviews of content, usage, and permissions.
- **Update Maintenance:** Regularly update SharePoint features and review deprecated functionalities.
- **Optimize Integrations:** Continuously improve integrations with Teams, Power BI, and OneDrive.

Key Benefits of SharePoint Optimization:

- Enhanced performance and user experience.
- Improved content findability and navigation.
- Increased security and compliance adherence.
- Better collaboration and streamlined processes.
- Higher ROI on SharePoint investments.

Ready to optimize your SharePoint environment? Let Odyssey Partners help you streamline, secure, and maximize the value of your SharePoint platform.