



ENGINEERS  
AUSTRALIA

# Cracking the code!

A repeatable team-based approach to  
SharePoint/Teams adoption with governance

Annabel Hay, Information Manager

Mel Finnigan, Digital Workplace Specialist

# Acknowledgement of Country

Engineers Australia acknowledges the Traditional Custodians of the Countries throughout Australia and recognises their continuing connection to land, waters, skies and community.

We recognise Aboriginal and Torres Strait Islander Peoples, as the oldest continuous cultures on earth and our first engineers.

We pay our respects to them and their cultures:  
and to Elders past and present and future.

*Today we present from Naarm Country.*



Artwork by Kalli-Jade Wall (Arrente, Jingilli)

# Your friendly speakers ...



**Annabel Hay**  
Information Manager

- ✓ Build record keeping and privacy controls 'by design'.
- ✓ Work across all business platforms and work practices (Dynamics 365 CRM, M365, Rosterfy Volunteer Management, Optimizely content management)
- ✓ Consulting style and strategic planning - love messes and creating a plan of attack.


**Mel Finnigan**  
Digital Workplace Specialist

- ✓ SharePoint Guru
- ✓ M365 adoption
- ✓ Integrate information governance / management with daily use of M365 apps
- ✓ Drive continuous business improvement

Our context

# Who we are

Founded in 1919 as the Institution of Engineers Australia. We are the voice of the profession.

- 
- ◆ Australia's peak professional body for all engineers
  - ◆ Represent Australia in the International Engineering Alliance
  - ◆ Accredit tertiary engineering programs to international benchmarks
  - ◆ Deliver ongoing professional development to the profession
  - ◆ Assess migrant skills applications on behalf of the government

As a mission-based, not-for-profit professional association, Engineers Australia is constituted by a Royal Charter to advance the science and practice of engineering for the benefit of the community.

# Our people & community

**~133,000**  
members

**~450**

Employees



**9**

Colleges



**10**

Offices



**~3,000**

Volunteers



**28**

Technical  
Societies

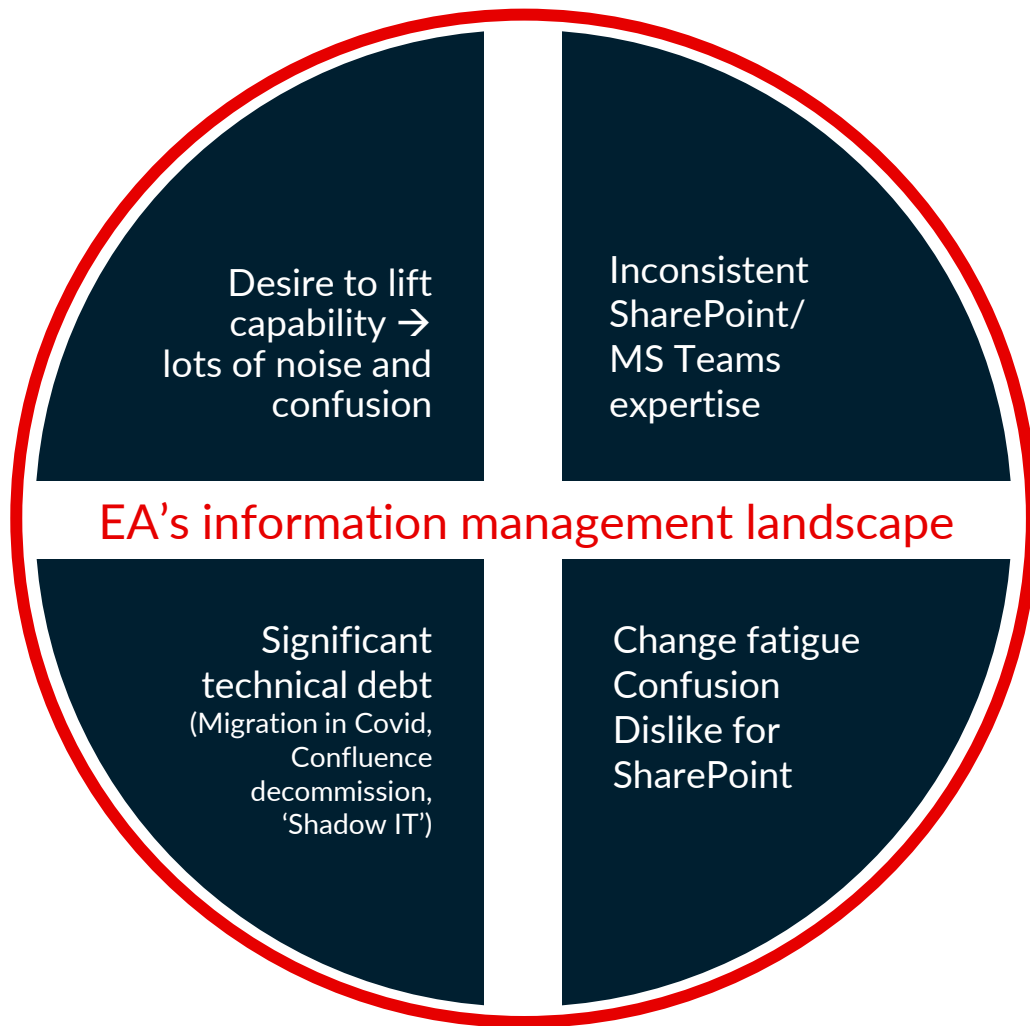


**~400**

Groups



The challenge



Desire to lift capability →  
lots of noise and confusion

Inconsistent  
SharePoint/  
MS Teams  
expertise

### EA's information management landscape

Significant  
technical debt  
(Migration in Covid,  
Confluence  
decommission,  
'Shadow IT')

Change fatigue  
Confusion  
Dislike for  
SharePoint

# Our approach



Focus on working with business teams – build capability together and focus on their specific issues.



Design a repeatable branded product (Toolkit).



Get the right resources. 'In-house'. A 'starter-finisher' who sticks with the program.



Two months to write design Toolkit then ...



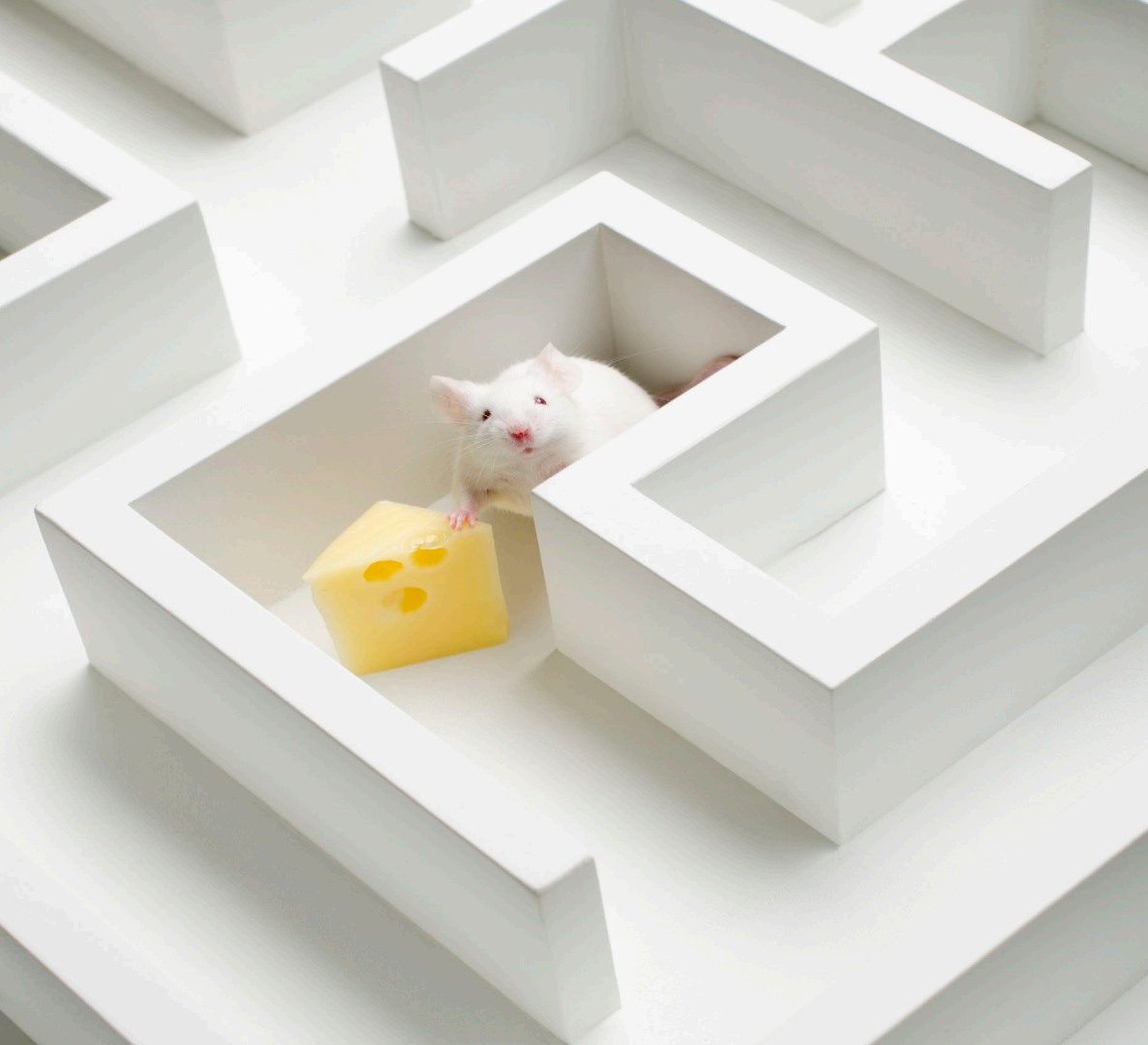
Commence with a 'Test and Learn' phase with friendly teams (the 3 Project Control Board teams).



Seek feedback via different ways to keep refining the product.

# The Toolkit

We crafted and executed a bespoke and scalable five-week program to work with individual business teams across our organisation.



# Deep dive and discovery

## For EA

- Storing outdated information (IM risk)
- Customer PII on employee OneDrive
- Reliance on Service Desk for simple issues
- Loss of document control with email use
- Use of unauthorised tools (e.g., Google Docs)

## For employees

- Covid impact: moving from shared drives to SharePoint > one site, one document library, hundreds of folders
- Using OneDrive for team documents
- Using MS Teams for 'document storage'
- Difficulty/frustration accessing files (syncing/poor architecture)
- Unmanaged permissions for sites and files
- Varied SharePoint/MS Teams skills
- Accumulation of old files (no archiving or retention policies)

# A repeatable approach: the 'Toolkit'



Work with one team at a time



Must not be time taxing (one hour a week max)



Get the team involved – they decide on the architecture



Upskill



Consistent structure and look and feel for hubs/sites/Teams



Move files



Archive/delete



Establish roles: Site Owners manage their sites and Teams (keep healthy)

# The program

## SharePoint Connect Toolkit

Pre-program	Week 1	Week 2	Week 3	Week 4	Week 5	Week 12
<ul style="list-style-type: none"> <li>• Get the team</li> <li>• Introduction one week before program starts</li> </ul>	Info session: 'The Collaboration Apps'	Info session: 'Common Ways of Working'	Review and feedback	Info session: Site Owners	Launch and hand over	Check-in
Communicate in dedicated chat group for the team (outside of catchups)						
	Working Group provide advice and help design architecture		Build hubs, sites, libraries; apply site template	Complete build and move files	Support	

# The program

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# The program

## SharePoint Connect Toolkit

Pre-program	Week 1	App	Purpose
<ul style="list-style-type: none"> <li>• Get the team</li> <li>• Introduction one week before program starts</li> </ul>	Info session: 'The Collaboration Apps'	 SharePoint	Document management and the source of truth
		 MS Teams	Messaging and collaboration
		 OneDrive	Personal file storage and shortcuts to SharePoint
		<b>Key practices</b> <ul style="list-style-type: none"> <li> Use SharePoint (not OneDrive) as the source of truth</li> <li> Use MS Teams for messaging (not file storage)</li> <li> Use OneDrive shortcuts (SharePoint in File Explorer; email attachments in Outlook)</li> <li> More libraries = better experience, better access, better search</li> <li> No more uploading into Channels or Chats → reduces duplicates</li> <li> Establish roles</li> </ul>	

# The program

## SharePoint Connect Toolkit








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## SharePoint Connect Toolkit

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### Key practices

-  Master the security/access panels: sharing, copy link, manage access, link settings, grant direct access, expiry date, block download
-  Use Copy link > paste into Teams (no more uploading into Channels/Chats) or paste into Outlook emails
-  Share at the highest level
-  Versioning
-  Search in the tenant, hub sites, SharePoint site, libraries, MS Teams
-  Use links to other documents → reduces duplicates
-  Use OneDrive shortcuts to access SharePoint via File Explorer (and attachments for Outlook emails)

# The program

## SharePoint Connect Toolkit

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# The program

## SharePoint Connect Toolkit

### Key practices

-  Two Site Owners, no more than three
-  Understand M365 Groups
-  Use Share site only feature
-  What Site Owners can do vs Site Members vs Guests
-  Audit guests and members
-  Share at the highest level
-  Keep the site healthy
-  Delete or archive old information

Week 4

Info session:  
Site Owners

Week 5

Launch and  
hand over

Week 12

Check-in

# The program

## SharePoint Connect Toolkit

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IC

# Internal Comms

Private group ☆ Not following 👤 10 members

GT

# Governance Team

Private group ☆ Not following 👤 13 members

Home

MT

# Brand & Marketing

Private group ☆ Not following 👤 28 members

Edit ↗

Documents

Home

+ New ▾

⚙ Page details

🖨 Preview

📊 Analytics

Published 2/27/2023

🔗 Share ▾



The page is checked out to Peta

🔒 Edit ▾



> Complaints

Notebook

Documents

Pages

Engagement & Growth

Site contents

Member Acquisition & Di...

Recycle bin

Professional Developmen...

Edit

Site contents

Recycle bin

Edit



## Welcome to the People team

### People and Workplace team document libraries

- Administration
- Communications
- People and Strategy Annual Plan
- People Team Development
- Projects
- Research and Resources
- Systems
- Templates
- Trackers
- Vendor and Supplier Agreements
- Archive library

### News

See all



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**Verlie Donchi**  
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### Helpful links

[EA Intranet](#)

[EA Branding Templates](#)

### Manage this site

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THE INSTITUTION O...

Press Ctrl+G to go right to a chat or channel

General Posts Shared **SharePoint Site**

Page details Preview Analytics

Published on 5/27/2026 Share Edit

# Welcome to Facilities (National)

## Document libraries

- Access Reports
- Administration
- Business Planning
- Contracts
- Contractors
- Finances
- Hybrid Working
- Images
- Procurement
- Properties
- Rapid Global
- Recruitments
- Room Hire
- Security
- Standard Operating Procedures
- Work Health and Safety
- Archive library

## News

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See all

Show desktop



# The program

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# Outcomes

Our innovative approach involved **redefining teams' filing structures and processes**, improved SharePoint and MS Teams **capabilities** and **security practices**, and applied **archiving solutions** to support and facilitate future retention labelling.



## What didn't work

- Using metadata in libraries
- Self-directed learning uptake poor
- Not all team members were engaged
- Most teams determined to keep old files
- Teams had no time/desire to move files

# What worked

## 📁 Redefined teams filing structures and the ways they work

- 29 teams completed in two years (363 employees)
- > 4.8 million files moved to new locations
- Team site template (consistent look, architecture)
- Dedicated hubs for each area; sites (per team function) with multiple libraries
- Improved SharePoint and MS Teams skills
- Improved access: sync replaced with OneDrive shortcuts
- Moved team docs out of OneDrive and into SharePoint

## 🔒 Improved security practices

- Upskilled on sharing, managing access and permissions, M365 groups
- Dedicated Site Owners (minimum of 2, no more than 3)
- Manage Guests

## 😊 Rapid user engagement

- Consistent look for Team sites
- OneDrive shortcuts (for File Explorer/Outlook/MS Teams/SharePoint)
- Information sessions

## 🗄️ Applied archiving solutions to support and facilitate future retention labeling

- Over half of the 4.8 million+ files moved to team's 'archive' libraries
- Commenced retention labels for some teams

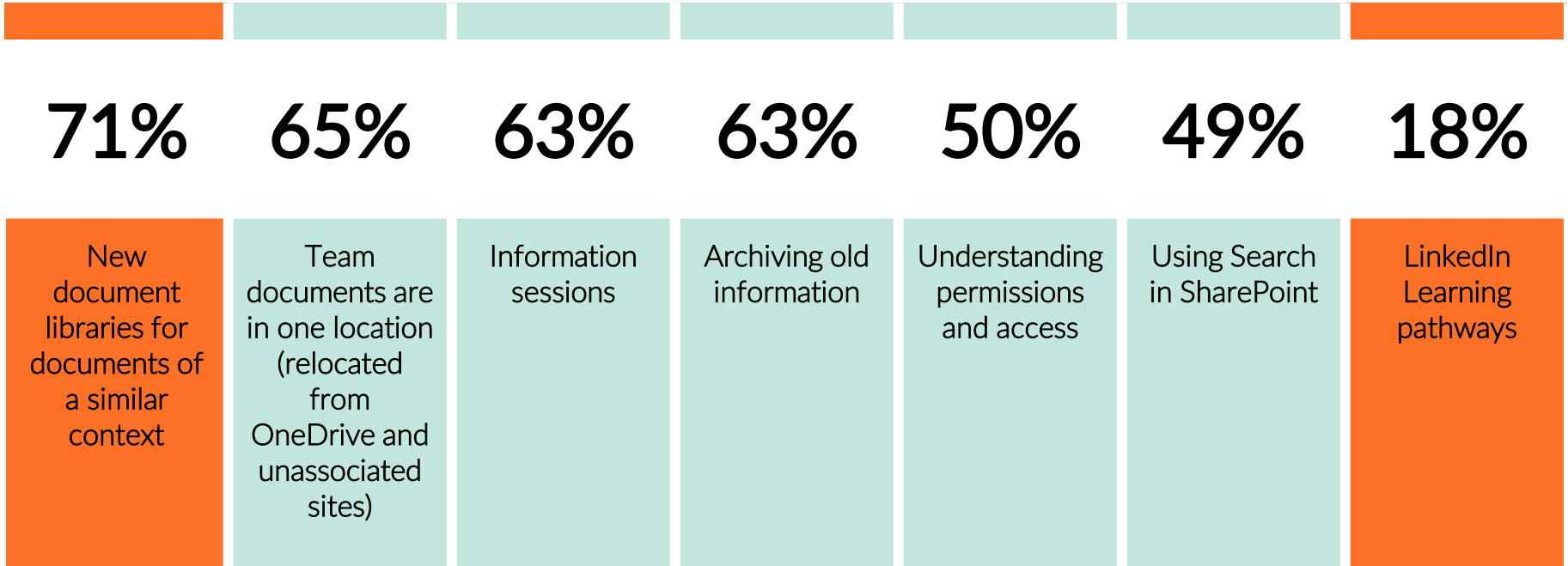
## 🗂️ Enhanced data governance and information handling

- One trusted place to find, share and manage information (the source of truth!)
- Replaced Google sheets with Excel, Lists and Planner apps
- Moved out of OneDrive into SharePoint
- See all above!






# Most valuable features of the program

6-week post project survey results – 38% response rate (125/327)









# Outcomes for the participants

6-week post project survey results – 38% response rate (125/327)

	Before the Toolkit	After the Toolkit
How do you rate your overall experience with <b>SharePoint</b> ?		
How do you rate your overall experience with <b>MS Teams</b> ?		

Lessons learned

# Lessons learned

-  Take the time to **refine the approach** (2 months preparation, 3 teams 'test-and-learns')
-  The program must **be flexible and adjustable** to participants' skill, engagement levels and calendars
-  Every team has different levels of engagement – recognise **the importance of a leader**
-  **A working group** goes a long way to advance the team and project
-  People are time poor – **self-directed learning is not a priority**; better to include information sessions
-  **Communication** is the key (group chat, working groups, catchups – catch them anyway you can)

The future



# What's next?

The Toolkit project finishes May 2026.

On our radar ...

- continue building M365 controls – risk management, site management, guest and sharing controls, DLP, record keeping, privacy and sensitive info types
- build expertise to support M365 platform applications – Viva Engage and Viva Amplify, Dynamics 365 integration, intranet, document control system
- build understanding of CoPilot and other AI tools, and the required controls
- keep building the SharePoint Operating Model – how do we SUSTAIN capability? how do we keep building on the Toolkit once the project ends?

[ thank you ]