

Collaborating with Multiple Project Groups

Sharing secured documents with remote teams

"...sending, receiving and manually incorporating all the changes for dozens of projects and from many people into one document became a large task. We needed one version of the truth; one master document per project that we could reference when working with remote teams, that allowed us to track changes automatically..." - Corporate Operations Director



Situation

The customer's ability to respond to new business opportunities was negatively affected by the heavy manual process of collecting and disseminating information to employees and outside constituents. Efforts became furthered hampered by scattered information across file shares that continued to grow as they pursued each new opportunity.

Collaboration with attorneys, contractors, customers, banks and other service providers were paramount to the customer's success as a real estate management company. Ensuring the timely delivery of sensitive information was important for winning real estate bids in a competitive environment, then securing mortgage information from banks to complete the close. The manual process used by the company required intense effort on behalf of the employees that often extended working hours well into the night.

The first challenge was to map the business processes that each employee performed for each stage of the business development activity. Second, they needed a content management and collaboration tool that could be used by individual managers and users that would improve the ability to store and find information, share documents internally and externally with multiple team members, and organize customer and asset information for opportunity analysis. Finally management needed a flexible way to modify reports and corporate templates on an as-needed basis to address changing business conditions, without generating multiple versions scattered across file shares and email inboxes.

User Concerns

The customer knew that there were several risk factors:

- Distraction of the managers from important business issues if detailed scripting of IT personnel were to be required
- Disruption of up and downstream business processes if unintended consequences were to occur
- Dissipation of scarce budget resources if the improvements were not captured

The Customer was concerned about the mapping process; specifically that the apps being deployed, if done incorrectly, would result in erroneous business process automation that did not support their needs, and create additional manual adjustments. Although each employee used the same file share, documents were emailed to many people, creating multiple versions as each member of the team contributed to the project. So, they required support from someone who had the business expertise to design, develop and deploy custom applications that met their requirements.

The customer had to engage several service providers through the course of each project, collaborating with each team to push sensitive information to specific people, and incorporate their responses into one master document.

The customer is a leading hotel, retail, storage and commercial real estate management firm with dozens of properties under management.



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The business users knew what information they wanted; but, they needed IT support to implement the process improvements. Internal IT departments are very talented in managing the corporate data and associated platforms; however, they are often too busy to become familiar with each departmental process and the associated business rules. Therefore, departmental managers must spend valuable time scripting each step to avoid the risk factors listed above.

Solution

The customer brought in AccessIG, Inc., a Microsoft Certified Partner, as a member of the team to help mitigate the risks and to accelerate the capturing of the benefits. Because AccessIG had extensive experience the customer did not have to script each step. AccessIG not only demonstrated a quick understanding of the business processes, but also those processes that would be affected up and down stream. And, based on their extensive experience, they brought valuable “best practices” experience that the customer could draw upon.

As a result, the customer gains faster benefits at a lower cost due to:

- the acceleration of the process improvements/prototyping phase
- the acceleration of the identification of the cost/benefit
- the acceleration of the identification of avoidable risk

Teaming with AccessIG, the customer implemented Microsoft SharePoint Online, a SaaS solution that met their budget, accessibility, business and feature requirements. Deploying SharePoint Online allowed the company to organize information that made navigation much easier than searching a file share, and keep ‘one version of the truth’ by generating documents that could be linked to by many parties, instead of being emailed and modified individually. The company needed a solution that corresponded to each employee’s business responsibilities, while keeping information secure and yet accessible by the right people. This solved the customer’s problem of manual integrating information into key documents that were needed to win new business, that otherwise required long after-hours work.

SharePoint Online’s Live ID authentication, and user permissions, provided multiple levels of security with a single sign on so that information security was obvious to all parties, but required no additional training. Outside constituents would authenticate using Microsoft’s online sources, requiring no additional software and very little help from the company.

The company was already an Office 365 SaaS subscriber. As an additional service to Office 365 users, SharePoint Online was an easy choice to implement, giving the company the added functionality needed to overcome multiple business challenges, for just a few more dollars per month per user.

Given the widespread adoption of Microsoft Office products and services, the employees were able to quickly learn the features needed in SharePoint Online. A few hours of user and administration training was all they needed to launch the solution internally before deploying to their external team members.

Benefits

- The customer was able to consolidate several strategic functions into a single department
- Power users were able to easily create the reports they needed
- Reporting could be done for single division or consolidated
- All users in the strategic business unit had a centralized location for accessing information
- Users didn’t have to learn new tools, training was minimal
- Information is consolidated and structured for easy reporting and analysis
- Customer has multiple options for creating and distributing reports; i.e., automatically generated, one time, published, e-mailed, etc.
- Gathering and completing the information has been automated freeing up critical resources