

Move Away from Digital Chaos

DIASPARK

Executive Summary



Today, your business revolves around electronic content. With heavy ongoing investment in the creation, storage and delivery of electronic content, it is equally important to consider the long-term storage and reusability of the resources produced. Not only it helps in bringing proper archiving/ recording but also increased availability, workflows and collaboration tying the whole organization or departments or teams into one single common document/ information (content).

This is a viewpoint paper based on a case study of implementing highly effective business process for management of digitization (structure and unstructured information), workflow and collaboration resulting in intuitive business dashboard for top management.

Give some useful insight on the state of content in your organization and issues surrounding it. The paper will help you examine some of the pitfalls of a proprietary content management approach and suggests a stronger platform and strategies that might be employed for managing digital content via Microsoft Office SharePoint. The paper also highlights the fact that how critical it is for an organization to choose a wise tool for managing their content.

"Its not only important to move away from paper or manual based processes but equally important is to move away from creating discrete or disparate digital repository leading to chaos"

Diaspark hereby makes an attempts to provide clear, experience based strategies on how best to engage in the long-term management of digital content.

The Client and The Business

The Client a Global Learning Solutions Company with a presence across 5 continents, is playing a key role in helping individuals, organizations and nations adapt to the changing requirements of a knowledge-driven world. With over two decades of operations in Education & Training domain, they have trained over 4.5 million students globally.

The Pain Points

The expanding business horizons and growing competition pushed their IS (Internal Systems) team to think about a robust solution for their marketing and sales teams, which could be more effective in terms of bridging the gap between the islands of information. The challenge was not only the quantum of information, but also the unstructured and unmanaged format of data. The scattered files and folders in the individual PCs as well as on the network and shared drives were impeding the retrieval of the correct content right at the time, when it was required.

"The company was facing Information Management Crisis at the Enterprise level."

The training coordinator, account executive, account manager, regional marketing head and such others were handicapped in terms of identifying and locating the latest document to be referred. Each one of them was living in his/her own Document, Spreadsheet or Inbox there was no team collaboration, thus a lot of rework, security and permission issues were overhauling the entire business process. Further, archiving & auditing including rights management policies were missing. At the end of the process, most of the work was still manual.

To add to this, the IS team had to manage multiple websites representing various brands of the company. This included managing authoring and publishing processes for these websites.

Solution - The Approach

The company's IS department was facing a critical challenge of adopting a new, though a versatile Enterprise-wide Business solution, keeping in mind geographically spread diverse setup and the pain points. We at Diaspark strived to understand and assess their current situation and sketched the entire Business Productivity Model for the client, maturing phase-by-phase. The intention of this paper is to share the problems faced and how we addressed them by designing a framework around Microsoft Office SharePoint 2007 and related Products and Technologies, concluding with the benefits to the client.

Growing IT Cost

Often organizations land up using solutions offered by different vendors to handle different processes. Though, the core focus surrounds Enterprise Collaboration, Business Process Management, Information Management and Business Intelligence, still there would be one solution each for every requirement. This, leads to a disconnected and disparate systems.

On the contrary Office SharePoint Server 2007 consolidates all these solutions into a single, scalable business platform. The clear benefit was reduced cost of infrastructure deployment and support owing to licensing of a single solution as compared to several. To give an example, Diaspark glued company's business process and forms features with the collaboration environment, and also incorporated corporate marketing and sales data using the KPI and Excel Service in the enterprise portal home page. With this change, users were able to aggregate and consolidate information from various data sources.

We implemented search indexing and business intelligence dashboards using Business Data Catalog (BDC) in Office SharePoint Server 2007, a tool that captured data from their line-of-business databases (Enterprise Resource Planning (ERP) or Customer Relationship Management (CRM) systems). This immediately started justifying their TCO.

Development Cost Vs Time

Dynamic business needs often lead to a sudden and immediate application development or changes in the existing piece of application, which is unavoidable. Both of these factors add to the cost of development efforts as well as time. It further complicates if there exists more than one solution, product or vendor. Let's consider how Diaspark designed the solutions over Office SharePoint Server 2007.

The Client's business solution revolves around functions like managing contents between the team members, Collaborating using the key information, and making some quick decisions based on the hard facts and figures available. Office SharePoint Server 2007 builds this foundation to provide key enterprise-level features such as Document and Content Management, supported with Workflows, strong Business Intelligence tools, Business Process Integration, Enterprise Search, etc. Because these features are built on a common platform and share the same set of core services, seamless integration between any enterprise solutions comes as standard.

The entire Sales and Marketing module was deployed and customized using the model mentioned above which resulted in a neat and clean MIS, automated and quick Sales Process Cycle, leading to more business closing opportunities. Information was on tips of every stakeholder at portal, emails, and even mobile.

Further, SharePoint allows core programming framework using familiar development languages, tools, and object models. The SharePoint application not only allows access and manipulation of data stored on SharePoint servers from other applications and platforms but it also works as common interface to view, edit or enter the data. All this leads to a substantial reduction in development time and cost.

Adaptability

The use of different tools and solution for every business aspect was more a curse than a benefit to both end users as well as management.

The solution turned out to be simplified in respect of maintenance, governance, delegated administration and user empowerment via a consistent, familiar environment designed with usability in mind. Now that there is only one infrastructure and one set of technologies to support, the overall perspective of the IT team also changed.

“Sales Team including the Regional heads started creating simple to complex approval based business process taking advantage of straightforward workflows. Now the Weekly Sales Report and Monthly Sales Plan is available all the time on the portal with updated information from all team members”

Enhanced Productivity

When it comes to calculating the quality delivery against the time and cost, any stakeholder will first think about the tools and framework he/she was provided to generate the output as desired. Let us look at this situation from pure content point of view.

The Challenge with the client was not only to manage the “content” but to understand and classify the so called available information as a content and record. To add to this, was a Legacy Enterprise Content Management (ECM) design that could only handle the “managed content”.

A conservative failure rate estimate of ECM technologies within large organizations is 50%
Source: Doculabs

The first task we performed was to move the multiple websites which were running independently, under one umbrella using Web Content Management (WCM MOSS 2007). Not only the life became simpler for the Content Authors and Publishers but also the webmaster was very happy.

The three fundamental features of WCM - Branding, Authoring, and publishing gave flexibility and a strong way to handle the content within the organization. Web based Authoring using clients like Word and InfoPath, acted as power fuel for saving time and quicker delivery of authored content.

“The course and training material was shared amongst the faculties, approved by the managers (geographically spread), keeping the sanity of check-in and check-out of the document, and maintaining the version control of the correct and the last document approved. An outdated training material was marked for archival and would not show up in the Search or shared resource pool.”

The overall site deployment was structured with customized MOSS Governance policies to handle the content sensitivity. The transition to WCM resulted in reduced deign time, controlled flow & publishing of information.

Aggregate EIM Anywhere, Anytime

The next challenge was to create the connectivity and communication between the stakeholders which included the sales and marketing executives from fields, working from various office locations, the trainers traveling to different client locations and the system. This secured extranet provided the teams to securely access the corporate resources outside the firewall using laptops and mobile devices. This streamlined the sales cycle, and execution of the operations including the delivery of training especially when on-site with a customer.

Teams and departments could now collaborate in real sense. Every department had their own dashboard portals that aggregated data from various data sources and different team member's including daily, weekly and quarterly numbers consolidating into Scorecard as well as, dynamic KPIs showing suppliers and vendors ratings. Regional teams could plan their six month training schedule in advance knowing the market dynamics, training resources availability.

Conclusion

Enterprise solutions such as collaboration platforms, portal frameworks, enterprise search, and business process automation tools are key enablers of productivity and efficiency in the workplace. SharePoint Products and Technologies provide a consolidated platform for enterprise solutions that can help you reduce costs and improve productivity and effectiveness in several ways.

It was not something great to bring the entire solution to the new platform. More critical was to understand the grass root problem and pain points for designing a practical framework for the Information Worker to be really called as "One". It was the transition from disconnected repositories and sites with basic search capabilities to integrated repositories for managing and publishing documents and records, with advanced search and Federated document and records management within and outside enterprise. It is important to choose an effective Information Management solution which will lead to a paperless solution and thereby helps you to move away from digital chaos.

About Diaspark Inc.

Diaspark is a Microsoft Managed Gold Partner and a leading provider of SharePoint Services. We share with you, unique features of SharePoint that can enhance your business productivity.

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