

CASE STUDY

Open Access Collaboration – A SharePoint Success Story

INDUSTRY
Energy

COUNTRY
USA



INFORMATION SILOS STYMIED COLLABORATION

With the consolidation of a critical business function, from a business unit-level responsibility to a centralized, corporate-level organization, this global company was presented with the opportunity to significantly improve its information management practices using Microsoft SharePoint.

Prior to consolidation, SharePoint was used in isolation across business units located around the world and corporate headquarters, resulting in inefficiencies and missed opportunities. To address this challenge, Access

Sciences was asked to develop a Pertempo™-based information and collaboration hub where employees could collaborate on developing best practices and supporting project, engineering, operations, and maintenance work performed by global business units.

ISSUE

Information siloes prevented corporate consolidation and collaboration

SERVICES DELIVERED:

- Business Process Automation
- Communication Strategy
- Content Analysis
- Go-Live Support and Reinforcement
- Metadata Modeling
- Pertempo™ for SharePoint
- Taxonomy Development
- Training Strategy and Curriculum

Some of the specific challenges included:

- Headquarters and business units worked in isolated SharePoint and network drive environments.
- Legacy SharePoint sites had been implemented several years before without design input from users.



- SharePoint sites existed in isolation with no means to navigate from site to site, resulting in highly siloed and duplicative work efforts.
- Minimal governance over site use and design resulted in a proliferation of sites in different states of completion and for overlapping purposes.
- Overly stringent and unrealistic access permissions prevented users from accessing content relevant to their work, and led to duplication of effort.
- Inconsistent collaboration between business units in different countries made it difficult to take advantage of prior work and lessons learned.
- Employees frequently depended on relationships to find information and verify its accuracy.

Our client's strong desire to leverage employee expertise across corporate headquarters and global business units drove the need for a standardized, sustainable solution.

Having a single place to house best practices, processes, lessons learned, templates, and examples would enhance employee's ability to collaborate and take advantage of work already completed by others. Making existing information accessible and findable would maximize its reuse and reduce redundant effort.

PERTEMPO™ – THE BASIS FOR SHAREPOINT COLLABORATION

Using Access Sciences' award-winning Pertempo™ solution as the basis, our team worked collaboratively with client personnel from information/knowledge management, technology, operations, and engineering to design, develop, and deploy a standardized, sustainable collaboration implementation using *out-of-the-box* SharePoint functionality.

It was imperative to work with users across the business to ensure that solution design reflected the ways they thought about and used information. Our team used this as input to configure the system to support of multiple views of content and site navigation. Since not all users look for content using the same search terms or parameters, our team designed ways to access the same information from different points of view. Our Pertempo™ solution provides for automatic assignment of common and function-specific metadata values, facilitating both cross-functional, intuitive search capabilities and meaningful content organization within business units.

Our client's existing business terminology was all over the place. Our team had to synthesize and standardize it into common metadata values (controlled vocabulary) so that users could identify, manage, and retrieve information with the confidence that they were getting what they were looking for.

SOLUTION

- ☑ Pertempo™ for SharePoint
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So that users weren't stymied by draconian security access levels, our client agreed to a "no harm to know" approach and our team created an open access model to maximize access to information wherever possible. To make sure the SharePoint users follow policies and procedures when accessing content, we implemented an automated application of records management policies.

AGILE IMPLEMENTATION DRIVES USER ADOPTION

With a foundational Pertempo™-based design in place, our team used an Agile approach to implement the solution in conjunction with client SMEs. Since the deployment included intimate client involvement and testing, user acceptance testing (UAT) became a formality. We followed implementation with hands-on post-implementation support and a content migration effort that minimized disruption to client activities.

BENEFITS

- ✓ **Easy to find information with an open access model**
- ✓ **Greatly reduced time spent searching for critical information**
- ✓ **Realized economies of scale with centralized support for geographically diverse project and maintenance work**
- ✓ **Reduce duplication of efforts with ability to share knowledge**
- ✓ **Improved collaboration across headquarters and business units**

Finally, our team created a support site and training material for long-term solution growth and sustainment. We delivered training to end users and administrators around the globe to provide a standard by which the new SharePoint solution would be used. And to keep the site sustained, we created transition of governance processes and tools, and rolled these out to client administrators.

AN OPEN ACCESS COLLABORATION HUB

Our Pertempo™-enabled open access collaboration hub now provides users with a one-stop shop for best practices, processes, networks, and collaborative support. They can now find and access information relevant to their work even if it was created by an employee in a different business unit or on the other side of the globe.

Based on the success of this effort, it is now being adopted across the corporation.

Key outcomes:

- Cross-Site Navigation - Common, intuitive navigation architecture, allowing employees to get to any site from any other site.
- Internal Site Navigation - Standard site layout components, making it easy for new site visitors to locate content quickly.
- Portal Areas - Pages that allow employees to see headquarters sites at a glance and reach any business unit site from a single location.
- Findability - The ability to find information regardless of where it is stored by entering a search term and refining results using relevant business terminology.
- Efficiencies - Discontinuation of the use of network drives for many departments, reduction in duplication of effort, and increased knowledge sharing.