

# CASE STUDY

## Reorganization Necessitates New Way To Work

 **INDUSTRY**  
Energy

 **COUNTRY**  
USA



### COLLABORATIVE WORKSPACE NEEDED ASAP

It can be challenging in a global corporation to ensure that all employees follow the same procedures and receive the same guidance. There tends to be a correlation between the number of operating locations and the number of places to look for information. To make matters worse, when employees can't find the information they need, they often recreate it, possibly duplicating existing work and moving further away from standard practices. Our client is part of the energy industry, where standard procedures and practices are crucial to operations integrity and reduction of risk.

In an effort to increase efficiency and effectiveness of its environment, health, and safety (EHS) function, the client reorganized the group to centralize expertise at the

corporate level. In the past, EHS stored guidelines, standards, procedures, and templates in multiple locations and employees had trouble accessing documents if they were not stored on a local server. The client wished to overcome this issue of having to duplicate content by consolidating best examples on a single site (portal) where all employees could access the same approved content.

They selected SharePoint as the platform for the published content portal and for collaborative team sites where members of the new EHS organization could work with

### 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

### ISSUE

New organization in need of a global collaborative workspace and single location for published content which is well organized and easily found by those with minimal training or expertise



each other and with colleagues in subsidiaries and business units to refine, develop, and maintain corporate-approved versions of EHS content.

Key challenges:

- Only those in the new EHS organization received training on SharePoint
- Many people needed to contribute content to the published
- Content portal but only a handful had authority to approve it, and no one should access it until it is approved
- EHS touches just about every aspect of work in an energy company; therefore, employees in other functions also required access to information on the EHS portal
- The critical nature of EHS work required members of the new organization to have a place to work as soon as they joined the team, but employees had yet to be assigned to their new roles in the organization

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## SOLUTION

- ☑ Used out-of-the-box SharePoint functionality and Pertempo™ methodology to develop team sites and a portal, including auto-population of metadata and the ability to refine searches using relevant metadata
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### METHODOLOGY GETS NEW ORGANIZATION UP AND RUNNING QUICKLY

Since positions in the new organization hadn't yet been filled, Access Sciences worked with subject matter experts (SMEs) in subsidiaries to define initial requirements for collaborative team sites. We focused only on processes that everyone agreed would be handled at the corporate level, thereby allowing for future growth of sites without rework. An Agile approach was used to build sites quickly with iterative review by SMEs.

Because EHS content would be created and used by employees across the corporation, it needed to be well organized and easily found. To this end, our design included

- Standard navigation across and within all sites
- Extension of the corporate taxonomy to include commonly accepted EHS terminology from within the subsidiaries and business units
- Auto population of default taxonomy terms at content upload to minimize the classification burden on users
- Configuration of SharePoint search to enable taxonomy use in refining search results

We employed out-of-the-box SharePoint approval functionality to:

- Allow anyone in the EHS organization to upload content
- Notify designated approvers when content was ready for approval

- Keep content hidden from view until it was approved

## **AUTOMATED TAGGING IMPROVES FINDABILITY**

Access Sciences Pertempo™ methodology includes development of a taxonomy, auto-population of taxonomy terms, standardized access permissions, common navigation, refined search, and an Agile approach to site design and development. All these components played a role in permitting new members of the corporate EHS organization to hit the ground running.

In particular, including EHS terms specific enough to be meaningful to content creators yet generic enough to be meaningful to those with less expertise enables the auto-population of search terms at the time of content upload. Therefore, content collaborators require

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### **BENEFIT**

- ☑ **Employees in the new organization had a place to work on day one and all employees have access to approved content**

less training and documents are tagged consistently. Employees throughout the corporation now have a single location to look for corporate-approved content and can find it quickly without knowing who created it or where it's stored.

In the end, EHS realized its goals with the collaborative team sites and published content portal. They serve as models

for subsidiaries and other client business units moving forward with new SharePoint implementations.

