

SharePoint 2007 Analysis, Implementation and Rollout Case Study

C O N T A C

Client Overview

Contac Service Inc is Canada's most pervasive travel industry logistics and customer relationship marketing service. Contac has offices in Vancouver, Montreal, and Toronto and has front-line and warehouse staff at all three locations.

Task

Contac is growing, and fast. Employees are located in four offices in three cities, and needed a platform for inter-company communication. Email was not enough; documents were distributed across multiple personal and public file shares, and new employees needed a repository of information to assist with on-boarding. Contac had reached the limits of Microsoft Office Excel and Word and needed a technology to enable their staff to collaborate on client orders, project status and find documents.

Implementation

Requirements analysis, prioritization and research of their business model identified the need for a branded departmental taxonomy with corporate, department and team repositories for data and document content with security and search integration into their existing file shares.

At the corporate level a team of content approvers were trained enabling most staff to propose content thus sharing the role of content creation across existing staff.

A client center was implemented enabling client representatives to share rates, quickly record, manage and report on orders. Custom data entry forms, workflows and business data catalogs for third party database integration was created to fit their specific process.

An integrated purchase order system was implemented using custom lists and workflows. To meet their specific needs a custom approval workflow with email, Adobe and Simply Accounting integration was implemented.

HR required a site to share highly sensitive data with only the relevant employee.

Individual, team presentations and personalized training videos and a survey were provided to assist in the rollout, along with documentation of the deployment, backup, restore strategy and custom workflow development.

Result

Dataledge enabled Contac to change its culture and establish a brand identity and online community across its geographic regions. Internal company information is quickly accessible and two high use tactical processes ensured adoption from day one.