CASE STUDY
Customer Service Efficiency Improved with SharePoint

THE CLIENT
A leading provider of investment, reporting, and service solutions. Whether you outsource investment management to third-party strategists or run your own model portfolios, their technology and services offer you the flexibility your business needs to grow.

THE CHALLENGE
Service Team and Trading Team Members were sifting through shared drives, local hard drives, and emails in search of information such as policies, procedures, and client data while interacting with clients. This led to service desk agents spending too much time looking for information that should have been quickly discoverable. Multiple versions and copies of the same document were being stored in different folders on the network drives and in email. It was nearly impossible to know which document was the latest and most relevant. Outdated materials were sprinkled throughout the network drives because the client did not have a process for reviewing documents on a set schedule.

The Service Team and Trading Team Members needed a way to increase the efficiency in which they could assist their clients. Enforcing permissions on who could see and edit documents was also a challenge.

THE SOLUTION
Recognizing that they needed to do something, a cross-functional team consisting of the Chief Operating Officer and representatives from the Service Department, Trading Department, and IT Department, attempted to create a SharePoint Online solution. The client soon realized that they needed help. The client reached out to IBS to help them build a new knowledge center.

The project kicked off with an onsite meeting which included an introduction to SharePoint Managed Metadata as well as identifying and categorizing the different types of forms and documents that the client created. The brainstorming session ended with identifying the unique attributes for each document type. IBS assimilated the information into content types and term sets that can be configured in SharePoint. A second meeting was held to validate and clarify information that was revealed during the kickoff meeting. IBS then went to work to create a proof of concept for the client. The third meeting demonstrated the proof of concept and left the client with some homework: add more information to the proof of concept and continue to work with it.

Using the information gathered from the three meetings with the cross-functional team and the results of the proof of concept, IBS architected a solution using Office 365.

TECHNOLOGIES USED
• SharePoint Online
• SharePoint Workflows
IBS created an intranet that included a knowledge center that leveraged out-of-the-box SharePoint functionality such as Search, Managed Metadata, Site Columns, Content Types, and various Web Parts to make information easier to find. The SharePoint Group structure and how users requested access was formalized to better address permission enforcement issues. Automating the content policies and procedures by creating a 365-day review period with associated workflows was implemented. Lastly, the discovery meetings uncovered the need for a simple project tracking application, which was implemented using content types, tasks, and issue lists.

THE RESULT

MILO (Mountains of Information Logically Organized) was created that serves as the client’s intranet. MILO’s knowledge center gives the service desk agents easy, instant access to information at a moment’s notice. Instead of spending 10-15 minutes looking for supporting documentation (that may not have even been up to date) to answer client inquiries, the agents can easily search, sort, and filter items using the knowledge center finding information in a couple minutes. This allows the Service Team Members to assist their clients in an efficient and accurate manner. A Project Tracking System also helps the Team Members stay on task with high priority projects.

![Screenshot of the MILO dashboard](image-url)