



## Smooth implementation puts money in the bank for US financial giant

### The Client

One of the ten largest banks in America  
Total assets: approx. \$140 billion  
Number of end-users: approx. 45,000

### The Challenge

To ensure a smooth transition to one of the largest implementations of Microsoft Office SharePoint Services to date.



### The Tools

Microsoft Office SharePoint Server (MOSS)  
Microsoft Windows SharePoint Services (WSS)  
SharePoint Designer  
SQL 2005  
Visual Studio 2005



### The Solution

SarasAmerica provided lead support to the SharePoint team from proof of concept right through to implementation on the SharePoint portal implementation.

### The Results

A successful implementation for the bank that was on-time and on-budget, with sound planning, cost savings on the migration project, and efficient teamwork

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### A Microsoft Office SharePoint Services milestone

Last November, one of the largest implementations of Microsoft Office SharePoint 2007 (MOSS) to date went live. The implementation took place at one of America's largest banks, and was led by Microsoft and Microsoft partners with some help from consultants SarasAmerica.



At the heart of the project was the design, development, and launch of an intranet portal. The portal provides a centralized location for all internal communications with the company. Most importantly, it provides the features the company needs to dynamically update content without direct assistance from their IT department.

Up until the SharePoint project, the bank relied on a legacy-based portal application to share information with their employees over the intranet. While functional, there were limitations in what it could achieve. More importantly, it and other means of information sharing were slowing productivity down.

### **Bottlenecks at IT department**

“There were significant bottlenecks developing, particularly at the IT department, which was being overloaded, especially with requests to update information on the intranet,” says SarasAmerica representative, George Almartz, Architect and the Microsoft representative for the bank.

“It was a very slow process: for every change someone in the company wanted to make, they first had to contact their IT department and explain the changes required,” he says. “Then, an IT staff member had to follow specific processes as they couldn’t have more than one team member making changes at a time. And of course there were the backup procedures required. It was very time-consuming and tedious work.”

The bank has a long relationship with Microsoft, and called them in to perform a proof of concept on implementing Microsoft Office SharePoint Services (MOSS) to help address this and other productivity issues.

SarasAmerica joined the five-person team as an external consultant on the proof of concept. Once the project got the go-ahead, SarasAmerica was made an integral part of the implementation team that would take care of implementation, customization, and training for the bank’s technical team.

### **SharePoint expertise critical during implementation**

The MOSS implementation started in September 2007 and went live in November of the same year. Twenty-five team members, including technical and business people, worked on the project. Now over 45,000 end-users access the portal, with five administrators overseeing the whole thing.

As the implementation was for a new product, unforeseen issues were to be expected during roll-out. SarasAmerica’s expert knowledge in SharePoint was critical in quickly and accurately identifying the issues that required immediate attention from developers.

“We work closely with the Microsoft product team – indeed, they trusted our abilities and knowledge enough to send senior product developers to look at the issues we discovered during the implementation,” George explains.

“It’s a very collaborative effort: we provide feedback, they send fixes, and we test those fixes and then ensure those changes work at the client site. Once we sign off, those changes are implemented.”

### **Helping put money in the bank**

SarasAmerica’s product knowledge also reduced costs significantly on the project during the migration project, which included upgrading the bank’s Microsoft WSS 2.0 (Windows SharePoint Services) component to WSS 3.0. SarasAmerica helped in the migration of 2000 sites from Microsoft WSS 2.0 to WSS 3.0 using strictly out-of-the-box migration features available in the application.

Although the migration was quite large, SarasAmerica was able to realize the project without assistance from third-party products. “Using what was already available to complete the migration resulted in a lot of savings for the client,” the SarasAmerica representative says.

The SharePoint implementation is also putting money in the bank with a reduced need for technical support. Since end-users now update content themselves on the content management system, IT personnel are devoted entirely to more technical concerns. “Previously, the application was supported by 10-15 people. Now only five technical team members are required to support it,” he confirms.

### **Setting the right processes in place**

SarasAmerica’s expert knowledge in SharePoint is proving critical in getting the most out of the bank’s investment in the application as they develop new business processes around it.

“We’re working with the different departments to help them design their business processes,” George says. “First, we educate them on how SharePoint can assist them. They then put together a process, which we review. Once this is accomplished, we help them design the workflow in the application.”

Employees at the bank are very excited about the many features the application provides, which will allow them to take care of business much more efficiently.

“Microsoft Office SharePoint provides a lot of features. Instead of putting files on shared drives, endusers can have a centralized location for managing their documents, with full changes and time tracking,” he explains. “It also provides sophisticated search functionality — which is key to effective Web-based content management — business process automation, and a lot of reports.”

In other words, employees are no longer hamstrung by the technological limitations of their systems, and productivity is set to rise. “With Microsoft SharePoint, the business people can take care of the business, and IT people take care of IT,” he says. “On the older technology, those two processes were becoming merged. Now, there is a clear distinction that is going to dramatically improve productivity across the board for content management systems.”