

# Sharing INFORMATION

*The days of sharing information involving nothing more sophisticated than forwarding e-mails are long gone. Smart companies are turning the management of information into a business advantage, where every department and business activity is built on the foundation of clear, current, searchable knowledge.*

Have you heard the one about the insurance company that was paying out on claims to customers who hadn't even paid their premiums? Or the architects who had so many versions of the same drawing that they were never sure which was the up-to-date one? Or the financial services firm that had to repeatedly buy the same expensive legal advice because it couldn't remember what had been said the previous time?

These cautionary tales... are all true. They are a dire warning of what can happen when growing businesses lose control of their information. Sometimes information is locked in individual 'silos', usually designed around business functions like accounts or sales, that make it impossible to get a complete picture of an individual project or client.

Then again, multiple copies of documents get sprayed around the company via e-mail and amended by different people. Sometimes documents are squirreled away in obscure corners of the network where colleagues can't find them. Sometimes the knowledge is simply in somebody's head, only their co-workers don't know whose.

In all these cases, the result is a workforce hit by the double whammy of feeling overloaded by information yet never being fully informed.

"The larger an organisation grows, the more of a challenge this problem is," says Andrew Smith, solutions business director at ICS Solutions, a Microsoft Gold Certified Partner. "Companies know the value of their information and that it defines their intellectual property. But they don't understand where it's stored or what the latest version is. The fundamental question people keep asking is: 'Where's the truth?'"

Changing the underlying structure of the information is pointless. In most growing businesses it would require totally new IT systems, and anyway, departments need 'their own' accounts systems, CRM systems, e-mail, etc.

It's more than a storage problem. What's required is a way of:

- Extracting information from silos and making it more widely available
- Achieving this in a way that remains relevant to each department or team of employees
- Enabling people to share information widely, yet in a secure and controlled fashion
- ...and letting them search entire repositories quickly and efficiently

## **Creating business relevance**

Interestingly, most of the technology challenges here have already been solved. Data storage and bandwidth have

never been more affordable. Resources simply need to be made available to people who need them – and without complication or fuss.

To achieve this, a portal is created where all the information relevant to a particular business entity, such as a project, client or product, is available in one place. That could include e-mails, documents, order and payment details, task lists, records of discussions and phone conversations etc., which may be physically stored in different functional systems. Key processes, such as late payments or unresolved complaints, can be clearly flagged so everyone is aware of them.

Each team may have its own portal, which can be created and moderated by a team leader. As well as pages with the project/client information outlined above, the team portal can also contain a personal page for each member; which can also include diaries and calendars for easy scheduling of appointments on a project or departmental basis.

If this sounds a bit like the 'Web 2.0' technologies such as blogs and wikis that many of us use in our personal lives, that's because it is. According to research for The Economist Intelligence Unit, "A full 85 per cent of C-suite executives see the sharing and collaboration aspects of Web 2.0 primarily as an opportunity to increase their company's revenue and/or margins". Unlike public-facing Web 2.0 systems, though, a portal solution based on Microsoft® SharePoint® Server is highly secure and infinitely customisable. After all, people will only use a new system if it can be customised to meet their day-to-day expectations. SharePoint Server 2010 also integrates seamlessly with the desktop software that employees are already used to; so, for example, calendar requests submitted through SharePoint Server 2010 will instantly appear in a user's Microsoft Outlook® calendar.

### **An end to the information free-for-all**

Once documents and other pieces of information are available via the team portal, individuals no longer need to keep their own copies. Everyone should therefore benefit from using a single, clear version of every document. The system can even warn employees if they're saving a document that someone else has already saved.

Even documents shared across multiple projects and teams will only exist in one master copy.

'Work-in-progress' documents that need input or sign-off from several people can be distributed via an orderly workflow process instead of the inefficient but all-too-common practice of e-mailing them to everybody at once. Often this distribution management can be done via easy-to-use electronic forms accessible via standard desktop software.

"Workflow is a pivotal tool for collaboration," says Eamon McGann, operations and technical director at Core, also a Microsoft Gold Certified Partner. "Even seemingly simple processes like signing off holiday forms or processing expenses claims can be made faster and more accurate. And if you have a quality assurance or compliance procedure that requires collaboration in a particular way, workflow can ensure things are done in the correct sequence."

### **Navigating the information maze**

A key part of improving productivity through shared information is enabling people to find things quickly – not just documents, but also more nebulous entities such as 'expertise'. McGann says users can initiate searches, but systems can also 'search by stealth', where common searches are conducted and key information collated in the background, ready to pop up whenever required.

"Searching helps get around the problem of silos of information, and because you can search for people and expertise as well as information, it becomes an integral part of the collaboration process," says Juliet Strong, SharePoint product manager at Microsoft.

All the activities outlined above can be carried out with SharePoint Server 2010, which combines the ability to create business and team-focused Intranet portals with sophisticated searching, workflow and business intelligence capabilities.

"A major benefit of SharePoint is that you can go to one place and do everything related to a specific business process," says Smith. "There's so much functionality in the product, and because it operates through familiar

front-end software such as Outlook and Windows® Internet Explorer® it can be integrated into the way users are accustomed to working.”

“Businesses already have a big investment in the Microsoft platform so SharePoint is a logical choice,” adds McGann. “In our clients’ view it’s exceptionally good value for money. In the current economic climate people have to work harder and make their money go further, and for a modest investment you can achieve huge benefits.”

### **Information sharing in action**

Reeves and Neylan, a Canterbury firm of chartered accountants, wanted to help its 175 staff in five offices to find information more easily. This included routine items such as policy documents and admin, and also information that could help improve customer service, such as client records, approved advice and marketing literature.

The firm decided to install an Intranet, which was built by Core, a Microsoft Gold Certified Partner, using SharePoint Server 2007. The new Intranet has become everyone’s home page. It contains company news, details of marketing activity and links to external Web sites such as the HM Revenue and Customs.

However, the main benefit is the search facility, which the IT team has christened ‘The Guru’. The Guru allows staff to perform searches spanning all client files, correspondence and e-mail, plus more than a thousand internal documents including HR, marketing and technical literature.

“I can type ‘share scheme’ into The Guru, and up come all the documents in our client files where those words appear,” says Clive Relf, one of the firm’s partners. “It’s like a Web search for everything my company knows.”

The main benefit is saving time. Historically, forms and documents were spread over hundreds of shared folders. It took hours to find them, and information quickly became outdated because files were not regularly updated. With SharePoint Server, all the relevant documents are owned, tagged and have review dates so that they are always kept current. Searching is virtually instantaneous, and staff can locate documents that they can reuse or adapt instead of writing something from scratch.

“SharePoint Server is a great place to go for advice and information,” says Relf. “It says ‘knowledge management’ on the screen, and it does exactly that.”