

Collaborate for Productivity

Corporate Portals, Knowledge Management,
Collaboration, and SharePoint

Agenda

1. Introduction & Definitions
2. The Importance of Collaboration
3. Examples: Corporate Portal ROI
4. Case Study: Our Corporate Portal
5. Summary

Introduction

Why we are we here?

- Talk about productivity, related to working together
- Give some success stories and case studies
- Get ideas on improving productivity through collaboration tools and corporate portals

Speaker Introduction

- Gerry Brimacombe, CEO of Sector Learning Solutions
- Sponsored by Veris
- Project Manager since 1983
- Business owner since 2004
- Director at Greater Victoria Chamber of Commerce
- Using SharePoint since 2003, teaching it since 2004
- Have trained close to 1000 people, and built hundreds of sites
- Built Sector's Corporate Portal in 2007; refined since
- Currently building a state-of-the-art company portal for Veris, using SharePoint 2010 and Hosted Microsoft Dynamics CRM.

Definitions

- **Intranet** – a network using the same protocols as the Internet, but private to an organization
- **Corporate Portal** – a central website on the Intranet, accessible by all staff, where knowledge about the business, markets, and staff can be read and written.
- **Knowledge Management** – the ways and means that organizations create, store and access knowledge to accomplish enterprise goals
- **Collaboration** – working together towards a common goal
- **SharePoint** – a Microsoft core technology platform; a collaboration tool

The Importance of Collaboration

Challenges in Team Communication

- More-with-Less mentality
- Specialists working in diverse locations and time zones
- Tracking of budgets and schedules must be timely and accurate
- Email and telephone are inefficient
- Changing work hours and expectations of 24/7 availability



Productivity Multiplier Effect

- **If I don't have the data or information I need...**
 - I search for it (takes time)...
 - Or ask another for it (takes time, of at least two people)...
 - Or recreate it (takes more time and introduces error)...
 - And is frustrating for all parties.
- **If I do have the information I need...**
 - I use it, with confidence.



Knowledge Management ROI

- Employee productivity surveys have shown employees spend 30-60% of their productive time searching for information to do their jobs
- Shell International invest \$6M in a Knowledge Management (KM) solution for 10,000 employees
- Review of operations concluded that the KM solution is generating at least \$300 million annually
- This is an annual ROI of 5000%

(Source "KM ROI", Ideas Magazine, May 2001)

Wasted Time

- Managers spend up to two hours per day searching for information
- 42% said they accidentally use the wrong information at least once per week
- 57% said that having to go to numerous sources to compile information is a difficult aspect of managing information for their jobs.

(Source: Accenture Study January 2007)

Examples: Corporate Portal ROI

Portal Success Stories

- **Verizon:** would email reports to 900 users, three times a day. Now post to portal eliminating almost a million emails per year, and the documents attached.
- **BMO:** moved HR policies and benefits information online. Hard costs savings on paper, fax, postage, copying, etc. Also estimate reduced processing and HR personnel time “finding” info at \$700,000 per year.

(Source: Sally Grande, BME, “The Journey from HR Intranet to e-HR, June 28, 2001”)

Mitre Corp.

Has calculated the following savings due to their Intranet:

- Time Submission: By moving manual timecard submission and tracking to the Intranet, employees save an estimated average **1 minute per day**.
- Expenses: each employee saves **2 minutes per day**
- Content Management: each employee saves **5 minutes per day**
- Help Desk: help desk staff save an average of **8 minutes per call**
- Job Pricing: job pricers save about **1 hour per pricing job**

By multiplying the time savings by the salaries of employees (using a conservative estimate of three-quarters of employees), **Mitre estimates that their intranet affords \$12.8 million in improved staff productivity.**

(Source: Debby Young. CIO Web Business Magazine. May 1, 2000)

CASE STUDY: Sector's Corporate Portal

According to the Gartner Group:

“Using SharePoint can save money and improve workers' productivity.”

One Version of the Truth

- How many places do you search for information?
- Once you find it, how confident are you it is the right Version?
- We want *One* version of the document stored in *one* place
- Reduce searching effort
- Don't waste time with out-dated files.
- Encourage / enforce everyone to not create copies



One Version of the Truth

Type	Name	Modified
Folder	Archive	28/11/2011 4:59 PM
Folder	Modules_Ready_for_Wireframes	28/11/2011 5:00 PM
Folder	Wireframes_Ready_for_eLearning_Production	28/11/2011 5:00 PM
Word Document	ER10_EPBC_Introduction_to_EPBC_Module_1_3_Draft V.10	07/12/2011 8:06 AM
Word Document	ER10_EPBC_Introduction_to_EPBC_Module_1.1_Draft_V0.7	02/12/2011 11:06 AM
Word Document	ER10_EPBC_Introduction_to_EPBC_Module_1.2_Draft_V0.10	28/11/2011 5:03 PM
Word Document	ER10_EPBC_Introduction_to_EPBC_Module_1.3_Draft.V0.8	29/11/2011 9:41 AM
Word Document	ER10_EPBC_Introduction_to_EPBC_Module_1.3_Draft.V0.9	29/11/2011 11:19 AM
Word Document	ER10_EPBC_Introduction_to_EPBC_Module_1.4_Draft.V0.5	29/11/2011 11:19 AM

Confusing and risky

Type	Name	Modified
Folder	PP1000 Transition Guide	01/12/2011 9:28 AM
Folder	PP14xx Introduction to EPBC	01/12/2011 9:28 AM
Folder	PP1600 Apprentice Overview	01/12/2011 9:28 AM
Word Document	PP1440 Intro. to EPBC - Module 1.3 NEW	02/12/2011 3:17 PM
Word Document	PP1500 Privacy Protection and Information Access An Introduction	02/12/2011 3:17 PM

Cleaner, easier, safer

Sector Corporate Portal: Key Elements

- Vacation Calendar
- Shared Task List
- Phone Messages
- Shared Contacts
- Current Projects
- Timesheets
- Client Files with Metadata
- Procedures Wiki

Vacation Calendar

- Who is away, when, in one spot
- Tracks vacation as well as doctor's appointments and time off in lieu
- Employees enter their time off, and manager approves it
- Link to Outlook

Vacation Calendar

Calendar Tools

Events Calendar

Scope: Week, Month

Expand: Expand All, Collapse All

Manage Views: Create View, Modify View, Create Column

Current View: Calendar

Share & Track: E-mail a Link, Alert Me

Connect & Export: RSS Feed, Connect to Outlook, Export to Excel, Open with Access

Customize: Edit List

January, 2012

T	W	T	F	S
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31	1	2	3	4

is Wednesday, October 07, 2011

January 22 - January 28 2012

	22 Sunday	23 Monday	24 Tuesday	25 Wednesday
7 AM				Kelly's Central America
8				
9				

Shared Task List

- Tasks entered during weekly operations meeting
- Automatically sends email when assigned or ownership changed
- One list for all corporate “to do’s”
- Linked to Outlook 2010, shows in Outlook “To Do” list and under calendar
- Manage from Outlook or SharePoint
- Reduces continuity/succession concerns and increases visibility and accountability

Phone Messages

May I take a Message?

- Customized SharePoint “Task List”
- Provides a simple text entry form for everyone
- Automatically email to message recipient
- Shows “my current messages” on home page
- Set message to “received” status and it is hidden but easily retrievable.

Phone Messages



Phone Messages - New Item

Edit

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

i The content of this item will be sent as an e-mail message to the person or group assigned to the item.

Message For *
Enter users separated with semicolons.  

Message Title

Status New
 Received
 Responded
 Disregarded

Message

Callback Number

Priority (2) Normal

Date Received * 12/7/2011 10 PM 00









Shared Contacts

- Standard list of Contacts
- Linked to Outlook
- All contribute, all consume
- Reduces phone calls, emails of “how do I reach XYZ?”
- Speeds ability to respond to clients
- Now being phased out as we implement CRM

Current Projects

- What are we currently working on?
- Who is managing it?
- Accounting codes and other high-level information
- Link to Project Subsite or Client Files
- Used in Timesheet

Current Projects

 Edit	Project Name	Project Status	URL	Notes	Internal/Billable	Dept Cost Account
	Sector - Internal (6190)	In Progress	Sector - Internal		Internal	6000
	Sector - Standard Training (5210)	In Progress	Sector - Standard Training		Billable	5100
	Internal - eClass (5210)	In Progress	Internal - eClass (5210)		Internal	5100
	VIHA SharePoint - KBENHAM	In Progress	VIHA SharePoint - KBENHAM		Billable	5600
	VIHA SharePoint - JBOARDMAN	In Progress	VIHA SharePoint - JBOARDMAN		Billable	5600
	GPI SharePoint	In Progress	GPI SharePoint	Subcontracted to Michael Patrick	Billable	5600
	Dale Carnegie SharePoint	In Progress	Dale Carnegie SharePoint		Billable	5600
	FortisAlberta	In Progress	FortisAlberta		Billable	5600

Timesheets

- Quick and easy and accessible
- Who (lookup), date (default today), Project (lookup), details, hours
- Different views to create simple reports
- Datasheet View for ease of entry
- All historical record, for all projects, in one place
- Export to Excel for advanced reporting and sharing outside of company
- “Billed” flag used to simplify invoicing process.





















Timesheets

Resource Name	Date Work Done	Time Category	Project	Hours	Detailed Description of Work
Gerry Brimacombe	11/23/2011	Billable Project	Veris V3 Intranet	2.00	Work on Design Document; Coordination of Office365 install; Team Communicaitons; Plan review
Gerry Brimacombe	11/29/2011	Billable Project	Veris V3 Intranet	1.50	Emails and Phone calls with Technet and David; Review of Project Plan and Phased payments
Gerry Brimacombe	11/30/2011	Billable Project	Veris V3 Intranet	1.00	Tecnet calls and email;
Gerry Brimacombe	12/3/2011	Billable Project	Veris V3 Intranet	2.00	Work on Design Doc
Gerry Brimacombe	12/4/2011	Billable Project	Veris V3 Intranet	8.00	Design Doc draft and deliver to David
Total				14.50	

Client Files with Metadata

- All Client files (proposal, communications, projects) in one place
- Emails also dragged-and-dropped into client folders
- Metadata for Client Name, file type, comments
- Display with or without folder structure
- “20 Most Recent” view gives a nice overview of what my team is up to



Client Files with Metadata

Type	Name	Modified	Contact Organization
	MNicholsonInvoiceNov2011 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	ELMSD Workplan December 2011 v1.2	12/7/2011 9:29 PM	Ministry of Children and Family Services
	ELMSD Hours Forecast By Week	12/7/2011 9:29 PM	Ministry of Children and Family Services
	ELMSD_Phases 1and2_Dec5_11_Roles	12/7/2011 9:29 PM	Ministry of Children and Family Services
	Lenardon Sector nov 1 - 30 2011 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	Navey - Sector - ELMSD - Nov 2011 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	Westwood 11008 Sector Nov 30 2011 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	Westwood 11007 Sector Nov 24 2011 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	OROM MSD Invoice Nov.2011 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	ELMSD_01_Invoice 11_11_30PZ 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	OROM MSD Invoice Oct.2011 	12/7/2011 9:29 PM	Ministry of Children and Family Services
	CRD SharePoint for the People Pricing August 2011	12/7/2011 9:29 PM	CAPITAL CITY ALLOTMENT A
	Veris Sponsors Sector Learning at Executive Breakfast Session	12/7/2011 9:29 PM	VEDANTA AND MEDITATION

Procedures Wiki



- Started with MS Word Policy & Procedures manual; found that to be too inflexible, so pasted into SharePoint Wiki
- More informal and practical
- Includes formatted text, images, links
- Updated daily, on the fly, by all staff
- Change History saved automatically
- Alerts tell me what's changed recently
- "It's in the Wiki" and "Wikify that" are our mantras


Procedures Wiki

Recently Modified
Instructor Travel Reimbursements
Instructors
Instructor Invoicing
Instructor Availability
Home
Lists
Hardware Status
Libraries
WikiDocs
Wiki Pages
Home
How To Use This Wiki Site
 Recycle Bin
 All Site Content

Administration
Checklists
Classroom
Clients
Communication ("Correspondence")
Consulting
Courses
Instructors
Marketing
Miscellaneous
Sales
Employee Handbook

Procedures Wiki

Site Actions   Browse Page Gerry Brimacombe ▾

 Sector Procedures Wiki 2.0 ▸ Wiki 2.0 ▸ Administration

Wiki Sales & Mktg CLIENT FILES All Sites

Operations Learning (site) Consulting

Management HR Meetings Search

Projects-TEst

Recently Modified

- [Instructor Travel Reimbursements](#)
- [Instructors](#)
- [Instructor Invoicing](#)
- [Instructor Availability](#)
- [Home](#)

Lists

- [Hardware Status](#)

Libraries

- [WikiDocs](#)

Wiki Pages

- [Home](#)
- [How To Use This Wiki Site](#)

Financial - Accounting

Office Duties:

- [Phone](#)
- [Internet](#)
- [Printing - Internal](#)
- [Printing - External](#)
- [Faxing and Scanning](#)
- [Filing](#)
- [Mail Merge](#)

Office Supplies and Equipment

Passwords

Portal Procedures

The Keys to the Gate – From Anywhere There’s Internet

1. URL

<https://portal.sectorlearning.com>

2. Username

3. Password

With Permissions

In Summary

- Staff waste a lot of time searching for information; some say 60%
- Collaboration Tools and Knowledge Management can reduce that waste
- If you want more productivity, consider building a Corporate Portal



“The future ain’t what it used to be”
– Yogi Berra



Thank you

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