



Case Study

Large Financial Services Client



Worksheet

Bross Group Contact & Project Information

Project Name/Title	Workflow to Manage & Coordinate Meetings around the World
Tools Used	SharePoint 2013 Enterprise, Nintex 2013 Enterprise
Point of Contact	Steve Conner
Email	sconner@brossgroup.com
Phone Number	303-885-4872

Customer Profile

Customer Name	Large Financial Services
Division	
Address	
City, State, Zip Code	
Phone Number	
Website Address	

Industry	Investment
Number of Employees	Approximately 1200
Annual Revenue	

Contact Name	
Title	
Phone Number	
Fax Number	
E-mail Address	



Company Profile

Large Financial Services Company

Business Situation

Company was having a difficult time scheduling appointments and coordinating meetings with their clients and employees around the world.

Technical Situation

This client had been using an antiquated system to manage meeting requests submitted by sales representatives. The meeting requests are to have members of the client team present to provide investment insight and demonstrations for potential clientele. The current system was cumbersome for all participants and required extensive manual tracking of required details to book the requested meetings. The client team required an updated workflow process to aid in collecting required information for the meeting request as well as track the status and whereabouts of the request.

Solution

The client team evaluated technology options and determined utilizing their already present 2013 SharePoint environment as a workflow platform would best meet their required collaboration need. In addition to the SharePoint technology, the team also invested into Nintex as a third party form and workflow automation tool.

The Bross Group was hired by the Large Financial Service's company to evaluate their "as-is" workflow and integration with their legacy system. From the evaluation process, Bross was able to itemize technology and communication gaps that exist with the system and design a state-model workflow. Additionally; Bross was able to work with the Large Financial Service's company to formulate a wireframe design for the custom entry form required to collect mandatory information from participating teams. Upon approval, the state-model design and form was then integrated into SharePoint with Nintex providing the workflow engine. The end result was a clean and manageable solution in which sales representatives submitted required information for the meeting requests, meeting requests were then circled through team members for required approvals or additional information. The final result was an outlook calendar entry creation upon approval. The state-model design provided the Client team the required immediate visibility into current status of each meeting request. Furthermore, the team was able to see which teams had outstanding tasks for the meeting requests.

Benefits

The Client investment witnessed multiple quantifiable benefits to include:

1. Man power time savings eliminating the need to manually track and collect information from participating parties.



2. The state-model approach to workflow design insures greatest performance and management of running workflows. The design provides a means for a workflow to be stopped and/or restarted at a provided stated and efficiently manages required resources for long-running workflows.
3. Centralized management of requests empowers teams to manage requests verses single individuals. Process eliminates stove-piped stalls in workflow process
4. SharePoint platform proven effective and efficient in handling list management needs on an enterprise scale. Functional design of SharePoint empowers team to manage entries as well as formulate needed reports without the intervention of IT team support.
5. Integrating custom Nintex Forms provides enhanced interaction with data. Not only does the form provide aesthetic appeal, it provided a venue to include validation and formatting logic based upon selections made in the form. (For example, hiding a section of a form until specific qualifiers are met.) The form design and logic were also extended to each task and conformed to iPad and iPhone views for a consistent user experience.
6. SharePoint platform provided a means for the Bross Group to deliver a user friendly solution that can be easily managed after the consulting team departs. Functional inclusion of administrative links targeted to appropriate client team members provides needed access to Group Management, Reporting, and other relative attributes associated to the solution.

Products and Services Your Company Used

For this IT solution the following products / services were used:

- SharePoint 2013 Enterprise
- Nintex 2013 Enterprise

Services Provided by Other Groups or Companies

Bross Group provided consulting services that aided in the design and implementation of the provided solution.