



LARGE FINANCIAL SERVICES CLIENT

Intro / Objectives

Our client was having a difficult time scheduling appointments and coordinating meetings with their clients and employees around the world, both of which are crucial elements to the health and growth of their business. To help bridge these gaps, Bross implemented SharePoint alongside Nintex as a third party form and workflow automation tool to make collaboration, communication, and scheduling a seamless and simplified process. This allowed our client to get back to what they really wanted to focus on - growing their financial business.

Challenges

Before Bross, the client had been using an antiquated system to manage meeting requests submitted by sales representatives. The meeting requests were to have members of the client team present to provide investment insight and demonstrations for potential clientele. Their system was cumbersome 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 the necessary information as well as tracking the status and whereabouts of the request without all the added layers and unnecessary steps and tracking.

Solutions

Bross evaluated technology options and determined utilizing their already present 2013 SharePoint environment as a workflow platform would best meet their required collaboration needs. In addition, for added functionality and seamless integration, the team invested in Nintex. After evaluating their "as-is" workflow and integration with their legacy system, Bross was able to itemize technology and communication gaps that existed within the system and design a state-model workflow to help improve and bridge the gaps. Working within a Large Financial Service company required a certain level of communication and efficiency, and Bross was able to navigate this effectively 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 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 as necessary. Once these steps were completed in the new, simplified system, an outlook calendar entry was created upon approval. Overall, the solution provided immediate visibility into each meeting request and which teams and outstanding tasks still existed for the requests, making it much easier and more transparent for the internal teams to keep things moving.

In phase 2 of the project, Bross integrated the solution with Salesforce.com (SFDC) - an initiative that allowed the sales team to create meeting requests directly from screens integrated into SFDC without ever having to leave the CRM or client screens they were currently working from. This solution helped increase efficiency across teams and made the workflow for sales far more intuitive and natural.

Results / Conclusions

After these solutions were implemented, the Large Financial Services client started to see tremendous results, including the following:

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

Bross' specific approach to the workflow design ensures greatest performance and management of running workflows. The design provided a means for workflow to be stopped and/or restarted at a provided state and efficient manages requires resources for long-running workflows.

Thanks to the centralized management of requests, entire teams are empowered to manage them versus a single individual, eliminating bottlenecks in workflow process. Alongside this, SharePoint has proven to be an effective and efficient tool in handling list management needs on an enterprise scale. The functional design empowers teams to manage entries as well as formulate needed reports without the intervention of IT team support. The implemented SharePoint solution is user-friendly and can easily be managed after the consulting team departs.

Enhanced interaction with necessary data thanks to Nintex Forms not only increased aesthetic appeal, but provided the much-needed venue to include validation and formatting logic based upon selections made in the form. The form design and logic were also extended to each task and conformed to iPad and iPhone views for a consistent user experience across devices.