



New document management solution delivered as part of a wider ‘tech modernisation’ strategy

Sector

With over 700 employees and operations in both England and Wales our customer has built a strong reputation as one of the UK’s most reliable logistics and housebuilding developers. With a rich 30-year history, the business is now at the forefront of sustainable development with focusing on creating environments that are underpinned by key principles including:

- Maintain biodiversity & creating sustainable environments by using responsible operating practices with net carbon reduction
- Diversity & inclusion of all staff driven by education & development of future skills
- Focus on the health & wellbeing of all people associated with their projects

Pain points

Following the launch of their Digital Transformation programme, the leadership teams were keen to improve communication throughout all levels of the business, despite employees and departments being in different geographical locations.

Previously, these services had been delivered through a legacy SharePoint solution and whilst being fit for purpose for many years, it had now reached the end of its useful life and was not sophisticated enough to take advantage of a modern workplace-driven solution. The business also required a solution that would allow them to leverage their existing investment in the Microsoft 365 platform.

Rather than implementing a solution that would only address short-term challenges, a more flexible long term solution was required that would adapt as the business continued to grow, allowing future processes to be managed efficiently.

With this in mind, the organisation had recently placed greater importance on the development of its existing technology platform. In a bid to leverage the benefits that workflow, validation and automation can deliver from its Microsoft 365 platform, the organisation began to invest significant time and resources into the modernisation process, and they engaged Circyl for technical support.

Objectives and approach

Given the organisations desire to utilise its existing investment in Microsoft technologies, it had conducted an internal review of its future business and technology requirements. Through this investigation, they had identified a number of business processes and workflows that would benefit from automation.

One of the project's key objectives was to incorporate the legal department into the new document management solution. Given the immediacy of this request, Circyl followed its JumpStart solution approach to quickly and efficiently deliver a core intranet platform.

Upon implementation, the platform could easily be enhanced with readily available components that form part of a larger framework of tools built within a business defined information governance framework.

By utilising Circyl's tried and tested JumpStart approach, the solution's delivery was simplified with greater control over project costs. This enabled aggressive timescales to be met, whilst ensuring the future success and adoption of the new document management solution.

Outcomes and principles

Using the JumpStart approach, all the business requirements could be met. The highly customisable nature of Circyl's platform meant that specific components could be added to transform the SharePoint solution into a sophisticated document management system.

Following its development, the SharePoint-based solution delivered the following services:

- Secure migration of all content from multiple repositories into the new document management system for information continuity
- Provides a single source of truth for the management of documents as key company assets, helping to reduce the time and cost of searching for information
- Offers enhanced search capabilities to relevant teams within the business, allowing users to find relevant information efficiently
- Delivers more efficient and timely business processes to ensure they are less labour intensive
- Reduced online storage and physical paper costs
- Further enhance adherence to GDPR requirements with improved document retention and disposition
- Provision of a secure environment for sharing documents with external parties using Microsoft Power Automate functionality for seamless integration



Technology utilised

Circyl leveraged the following technologies throughout the course of the project:



SharePoint: SharePoint is a web-based collaborative platform that integrates with Microsoft Office, enabling organisations to manage and store documents efficiently. It is highly configurable and solutions can be tailored to meet the unique needs of any business.



Microsoft Azure: Azure is a cloud computing platform and an online portal that allows users to access and manage cloud services and resources provided by Microsoft



Power Automate: Power Automate is designed to help businesses create automated workflows between popular apps and services, Power Automate allows organisations to synchronise files, receive notifications and collect data.