Social Business Interactive

SharePoint 2013
Social Intranet
Case Study

Middleburg Bank

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BACKGROUND

Middleburg Financial Corporation was established in 1924 to serve the local banking needs of the Leesburg, Virginia community. While still based in Loudoun County, the bank has grown to provide service to 10 different counties in the state. By 2013, their existing information systems were no longer supporting their expanded operations and needs.

CHALLENGES

Middleburg Bank had no true, central intranet. Lack of employee collaboration and centralized communications were principal drivers behind the need to launch a new, integrated enterprise intranet portal.

Several challenges and requirements had to be addressed:

- **Improve Collaboration**
  Facilitate document and information sharing between employees, departments and locations, and to promote knowledge sharing, co-authoring and social interaction

- **Process Improvement**
  Develop standards for employees to perform their tasks with a new intranet portal that allows employees to more easily accomplish their objectives, and thereby improve productivity

- **Single Access Point**
  Create a single integrated social intranet solution where employees can do their work, collaborate, and use applications and other enterprise systems

- **Discovery**
  Employee jobs were being made increasingly challenging because they could not quickly access the files they needed and considerable time was being spent searching for files

- **Content Migration**
  Migrate all the existing data to the new intranet and new information architecture (over 650,000s files)

- **Timeline**
  Build and launch the new digital workplace intranet within a year

Middleburg Bank sought out a technology partner that could provide a cost-effective, all-in-one solution. The partner would help them address the aforementioned challenges, understand their own information needs, and implement a completely new system. They chose Prescient Digital Media (Prescient) and its sister company Social Business Interactive (SBI), a highly experienced team of intranet and SharePoint specialists.

STRATEGY

As intranet specialists Social Business Interactive knows that every industry is unique and every company has a different vision and culture. Consequently, listening is an essential part of Social Business Interactive’s strategic planning process. We approached the Middleburg Bank project with open ears and used an integrated, agile strategy to deliver complete and measurable solutions by following our specialized intranet project methodology.
ASSESSMENT

We undertook an in-depth business and user requirements analysis by using interviews, focus groups, and user surveys to engage users and better understand Middleburg Bank’s current practices. We also identified shortcomings with their processes, and their business and user needs. We created a Key Findings Report to support the next phase (Planning).
PLANNING

We devised a strategic plan, mapped out governance models, and set out designing the new information system in a manner that satisfied the collected requirements all while maximizing usability and streamlining the bank’s operations. We created an entirely new information architecture that changed how Middleburg Bank’s information would be structured and stored. We created detailed wireframes to provide the basic visual prototype for how pages would appear. Regular workshops were conducted in order to validate the bank’s business requirements and to establish the technical requirements for the new intranet. We created a style guide with Middleburg Bank’s branding elements and integrated these elements into user-friendly interfaces for both desktop and mobile reactive design.

TECHNOLOGY

We helped Middleburg Bank evaluate various technology vendors and solutions to determine the best fit for the banks’ diverse needs. SharePoint 2013 was chosen as the appropriate platform for Middleburg Bank’s new intranet. This selection would save them extra customization cost, which often amount to significant sums. We also performed an evaluation of the bank’s current IT infrastructure, then designed and determined the new hardware and hosting service to be employed to support the new SharePoint 2013 intranet portal.
IMPLEMENTATION

The collection of intranet sites, workflows, a customized search engine, and applications were developed according to Middleburg Bank’s specific requirements. Citrix and Outlook, as well as their other existing applications, were integrated into the new SharePoint 2013 environment. Rigorous quality control and quality assurance testing were conducted to ensure that every component was functional and met the high-level exit criteria. Social Business Interactive worked closely with Middleburg Bank’s IT department to setup a scalable infrastructure architecture and to configure the SharePoint servers. The other significant task, a full content migration from the old system to the new Intranet, involved hundreds-of-thousands of documents and was accomplished using Prescient’s established methodology (see the SharePoint 2013 Content Migration Case Study at www.SocialBiz.ca).

ADOPTION

We provided SharePoint training to Middleburg Bank’s system administrators, end users, and IT department. Maintaining on-going support is part of Social Business Interactive’s core values.

OUTCOME

Using our proven methodology, Prescient and Social Business Interactive provided a complete social intranet solution for Middleburg Bank. A significant factor that contributed to the success of the project was the time we dedicated to listening and understanding the bank’s core business, and their business and user requirements. Prescient and Social Business Interactive’s SharePoint expertise and guidance, with both information and infrastructure architecture, were also key factors that made the project a success.

We worked together to develop a strategy and build a new system that:

- Streamlined business processes
- Made it easier for employees to find and share information
- Satisfied a wide range of unique needs

Providing a comprehensive, all-in-one solution was also cost-effective as the team of Prescient and Social Business Interactive worked hand-in-hand while taking care of every consideration from the beginning to the end of the process, including; consulting, SharePoint development, content migration, technology integration, and various support activities. While adhering to the Industry’s Best Practices and performing our own rigorous quality control and quality assurance standards, the new system was delivered within the required time constraints.

FOR MORE INFORMATION

Visit our website at www.SocialBiz.ca or call us directly at 416.596.8808