

North Shore Credit Union Transforms Collaboration with SharePoint 2010



North Shore Credit Union and
Avanade Improve Employee
Productivity with Streamlined
SharePoint 2010 Collaboration
Platform



Business Situation

Founded in 1941, North Shore Credit Union is a member-owned financial institution that provides expert advice in banking, loans, investments and insurance. Headquartered in North Vancouver, British Columbia, the Credit Union's 320 skilled employees serve almost 40,000 members (both Business and Personal) in Vancouver, Burnaby, the North Shore, Squamish, Whistler and Pemberton. Member service is provided through the Internet, telephone, 12 branches and more than 2,000 surcharge-free ATMs.

Collaboration is a key tenet at North Shore Credit Union but its overgrown intranet platform made it difficult for employees to collaborate and to access the content they needed to effectively do their jobs.

Over its 10-year life, the intranet platform had become overrun with data, making it cumbersome for employees to use and problematic for the credit union to keep current. With more than 6,000 pages of content, employees found it challenging to find relevant content needed to effectively support their internal and external customers. North Shore Credit Union's highly customized and aging intranet platform also became onerous for its IT department to manage and a source of frustration for managers and key stakeholders who found it difficult to update, use and locate information.

As a result, the credit union's IT department found it challenging to meet the needs of all internal stakeholders, who relied on the IT team to publish updated content due to the platform's content-posting and sharing constraints. Employees grew frustrated that this bottleneck resulted in content taking a considerable time to post, making information less relevant by the time it was made available on the intranet site.

"Transparency and open communication are key philosophies of our culture at NSCU, and we saw our intranet as a key tool for improving productivity, collaboration and communication. We knew it was time for an overhaul."

Avanade began working with North Shore Credit Union in January, 2011 with an aggressive timeline of deploying a new SharePoint 2010 platform. Working together, Avanade and North Shore introduced the platform to credit union employees in October, 2011—in just eight months.

Today, North Shore has a new platform that has dramatically improved employee collaboration and serves as the foundation to support many other business processes within the credit union.

The Solution

Employee communication and collaboration is a cornerstone of North Shore Credit Union's culture. Its philosophy of ensuring employee success has earned the company the designation as one of Canada's "Best 50 Small and Medium Employers."

With these priorities in mind, North Shore Credit Union partnered with Avanade Canada to develop an intranet strategy that would dramatically improve the way in which employees collaborated with one another. Leveraging SharePoint 2010, the credit union sought to establish an innovative and real-time approach to collaboration.

Furthermore, the investment in SharePoint 2010 enabled North Shore Credit Union to realize a number of immediate benefits within its first release. These benefits were driven mainly through 'out-of-the-box' functionality that allowed the business to improve operational efficiencies, reduce development/maintenance costs, enhance user experience and enable longer strategic ambitions.

During the migration process, Avanade helped North Shore Credit Union identify the infrastructure necessary to support current and future needs.

From the beginning, Avanade liaised closely with the credit union's IT and HR/Communications departments, ensuring that the design and workflow would meet the differing needs of both groups. Avanade dedicated a significant effort to ensuring the user experience best fit with North Shore's goals and objectives. This required the team to demonstrate numerous options to North Shore in order to identify the best approach for the company.

Once deployed, Avanade also worked closely with the credit union to ensure that business unit content owners were trained and knowledgeable on using the new platform.

Results

Today, North Shore Credit Union has a robust platform that empowers employees to share important content and more easily search and find the information they need to be more effective in their roles. In addition, North Shore Credit Union realized several benefits from this project, including:

Significantly improved content search. North Shore employees have new search and locate tools that make it much easier to find the content they are looking for on the intranet. This was the single biggest objective for the company. To achieve this, Avanade first worked with North Shore Credit Union to identify which content needed to migrate to the new site based on relevancy. Of the 6,000 pages of content on the old site, Avanade ultimately migrated 3,000 pages. In addition, North Shore implemented standardized templates for all content, ensuring a consistent look-and-feel that makes it easier to search and find the content employees are looking for.

More efficient content sharing. North Shore's new platform incorporates permission-based widgets that empowers managers and key department heads to post their own content to the intranet site without the involvement of the IT department. What used to take days to post on the intranet now takes seconds.

North Shore Credit Union's IT department and Avanade worked with each of the company's business units to understand their needs and how to more effectively facilitate collaboration. This input played a key role in the overall design of the new platform.

"Accountability is one of our core philosophies at North Shore Credit Union. With this platform, our business owners now have the tools and knowledge to be accountable for keeping their content up to date, which makes it more efficient and relevant to employees," said Johnson.

These widgets also facilitated employee communication with key executives within the company and replicated valuable communication channels onto the new site, including the credit union's Chief Executive Officer, Chris Catliff. With the click of the "Connect with Chris" button, employees can easily more readily send emails and ask questions directly to the CEO that are then personally answered via e-mail.

“The more two-way connection between employees and executive management the better,” Johnson said. “Our new intranet allows us to continue to deliver on our culture of open communication.”

More visually appealing home page. The new site enables North Shore business stakeholders to post photos on the home page, as well as collapse and expand sections, far more easily than the previous site. This enables the credit union to present more information to staff in a more impactful and user-friendly way, which results in increased participation and readership on the site.

Rapid execution and integration. North Shore Credit Union had already outgrown its legacy platform and needed results fast. Avanade leveraged its methodologies and experience from hundreds of SharePoint migrations to complete the migration in just six months for its 320 users. Avanade also leveraged migration tools from AvePoint to automate the content migration which contributed to the rapid delivery. North Shore Credit Union credits the Avanade team and its Project Manager with deftly balancing the company’s business challenges with ensuring the project was on time and on budget.

“We knew our timelines were aggressive, but our Avanade Project Manager was very clear in the steps that needed to happen and resources required to effectively complete the project. We were very impressed with Avanade’s capabilities. At every step of the way, Avanade worked with us to ensure our new intranet platform met our business objectives and within our budget and timelines,” said Peter Chau, Manager, Business Technology Infrastructure, North Shore Credit Union.

More efficient processes. Now that North Shore can apply permissions to different groups to post their own content, the IT department has reallocated resources that were once dedicated to managing content posting and other intranet-related requests to support other IT needs and put more focus on developing a long-term strategy to support the business.

A foundation to support other business processes. While the company initially focused on improving its intranet, it intends to leverage its SharePoint 2010 platform to support other business processes in the future. North Shore Credit Union has plans to integrate Microsoft Lync with SharePoint to facilitate even more real-time collaboration amongst employees, and will use SharePoint to integrate the company’s existing digital content management system.

The credit union also will leverage Microsoft’s business intelligence tools to further improve the searchability and relevance of content both on its intranet and throughout its organization. North Shore believes that SharePoint’s user interface and Web-based tools and standardized templates will make it easier for employees to access other information within the business.

About North Shore Credit Union

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“As an organization we are focused on collaboration and teamwork. Our employees are truly thrilled with our new intranet platform, which is more organized, standardized and easier to use. But the new intranet platform is just the beginning. It will be a lot easier to leverage SharePoint across our business to help deliver other efficiencies and support our business as it evolves. Our platform will ultimately serve as the underpinning to many other platforms within our business.”

**Marni Johnson, Vice President
Human Resources and
Communications, North Shore
Credit Union**

“Over the years, our intranet had become very much like an unkempt garden—overgrown, unstructured and unwieldy”

**Marni Johnson, Vice President
Human Resources and
Communications, North Shore
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About Avanade

Avanade provides business technology services that connect insight, innovation and expertise in Microsoft® technologies to help customers realize results.

Avanade’s services and solutions help improve performance, productivity and sales for organizations in all industries. Additional information can be found at www.avanade.com

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