



Introduction

At So365, we pride ourselves on leveraging the power of Microsoft 365 to deliver innovative and impactful solutions for our clients.

At So365, we are dedicated to empowering businesses with cutting-edge solutions that foster growth and innovation.

Our expertise spans a wide range of projects, from enhancing collaboration with SharePoint for FTSE 250 companies to modernising job tracking applications and developing mobile apps for streamlined operations. Through our tailored solutions, we have successfully transformed communication, boosted productivity, and ensured compliance across various industries.

These case studies highlight our commitment to excellence and showcase the tangible benefits our clients have experienced, including improved operational efficiency, enhanced user experiences, and continuous support for ongoing success.

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Transforming Communication and Collaboration: A Microsoft 365 Adoption Journey

The client is a leading medical defence organisation that provides professional indemnity for clinical negligence claims. They provide medico-legal advice, support with disciplinary and regulatory investigations, and assistance with patient complaints to healthcare professionals.

The Challenge

The client, which employs approximately 420 people in multiple locations throughout the UK, embarked on a comprehensive project to adopt Microsoft 365 to enhance communication, collaboration, and productivity across the organisation.

Objectives

The project aimed to enable all individuals

to successfully adopt SharePoint, OneDrive, and Microsoft Teams.

Key objectives

- Understanding the communication, collaboration, and productivity features of Microsoft 365 and their benefits to the organisation.
- Enabling departments to fully grasp the key features of SharePoint, OneDrive, and Microsoft Teams and their integration.





- Identifying potential barriers to adoption, including training needs and communication with third-party applications.
- Capturing the need for an internal communication hub to improve crosscompany communication and access to common information.

Approach

Discovery Sessions

- Conducted initial discovery sessions focusing on the values and benefits of Microsoft Teams.
- Addressed key questions on how Microsoft 365 would benefit the organisation and individual users.

Early Adopters

- Targeted a small audience of greenfield projects to use Teams instead of shared drives.
- Implemented governance and security models based on department workshops.
- Conducted Lunch & Learn sessions for detailed training on working with documents in Teams.

Learning and Adoption Site

 Created a SharePoint Communication Site to host adoption and training materials.

Project Champions

- Identified project champions in each department to promote and support the adoption process.
- Created a Microsoft Team for champions to share experiences and issues.

Training and Workshops

- Delivered workshops and training sessions tailored to the needs of different departments.
- Provided practical and workable solutions to everyday working practices.

Key Deliverables

- An adoption and assessment report.
- A populated and configured SharePoint communication site.
- Adoption and training materials created for the client.

Conclusion

The project successfully enabled the client to understand and leverage the benefits of Microsoft 365, improving communication and collaboration across the organisation. The tailored training and adoption approach ensured that departments could effectively use SharePoint and Microsoft Teams, leading to enhanced productivity and streamlined workflows.



Enhancing Productivity and Reducing Risks: Microsoft 365 Adoption at a UK Bank

The client is a specialist bank in the UK, headquartered in London, that provides a range of financial services including mortgages, bridging finance, development finance, and savings accounts. They focus on delivering attentive, award-winning service to businesses, charities, and individuals, supporting those often overlooked by other banks

The Challenge

The client, which has around 400 staff, embarked on a comprehensive project to adopt Microsoft 365. The goal was to enhance communication, collaboration, and productivity throughout the organisation. We partnered with them to support this significant adoption initiative, ensuring a smooth transition and maximising the benefits of the new platform.

Objectives and Approach

The project aimed to ensure the successful adoption of SharePoint, OneDrive, Microsoft Teams, and other Microsoft 365 services by the client. This was achieved through a comprehensive training and adoption program designed to enable all individuals within the organisation to effectively utilise these tools, enhancing overall communication, collaboration, and productivity.





Discovery Sessions

- Introduced the client's employees to the broad concepts and features of SharePoint, Teams, and OneDrive for Business.
- Conducted initial training sessions with the core client project team to gather feedback and make necessary adjustments.

Training Delivery

- Delivered individual online "lunch and learn" sessions to 20 client departments.
- Conducted online SharePoint expert training sessions.
- Created a learning and adoption environment within the client's tenant to be used during the expert sessions.
- Supported the client's project team with planning and scoping the training sessions.

Adoption Strategy

 Implemented a multi-channel approach to ensure successful adoption of SharePoint and Teams, followed by other Microsoft 365 services as they were enabled by the client.

- Focused on delivering training to identified site and team owners, as well as specific training for SharePoint administrators and internal IT and support teams.
- Adopted a phased training approach, starting with early adopters and evangelists, followed by business areas, and finally HR and finance departments.

Outcomes

- Developed a suite of online training sessions to ensure the client's departments had the required knowledge and skills to work with their documents via Teams and SharePoint.
- Enabled the client to develop internal experts to support the ongoing needs of the departments.
- Provided the communications team with content owner training to manage SharePoint communication and team pages.
- Delivered a bespoke internal company directory using the Microsoft 365 Power Platform.



Key Benefits

 Enhanced user productivity and consistency across the business through indepth training.

- Reduced data risks by consolidating content into a centralised and approved data storage facility.
- Opened opportunities for more sophisticated file and process automation in the future.
- Improved internal knowledge sharing and discovery through the company directory.

Conclusion

The adoption of Microsoft 365 has significantly benefited the client. Enhanced communication, collaboration, and productivity were achieved through comprehensive training. Employees are now proficient in using SharePoint, OneDrive, and Teams, leading to improved consistency and reduced data risks.

The centralised data storage and bespoke internal company directory have further streamlined operations and knowledge sharing. This project has also paved the way for future automation opportunities, ensuring the client remains technologically advanced.







Building Connections: Enhancing Collaboration with SharePoint for a FTSE 250 Company

The client is a FTSE 250 land and property regeneration company in the UK, specialising in transforming former industrial sites and urban edge extensions into sustainable places where people want to live and work. The company owns and manages approximately 14,000 acres across around 100 sites in the North of England and the Midlands, focusing on creating new homes, jobs, and communities while delivering long-term value for all stakeholders.

The Challenge

The client sought to enhance their internal communication and collaboration by developing a company-wide SharePoint intranet solution. Our team, in collaboration with the client's IT service provider, successfully delivered this project, which included an adoption programme and comprehensive training for the client's staff.

Objectives

The primary objectives of the project were to:

- Create an all-staff information and communication hub leveraging out-of-thebox SharePoint features.
- Ensure seamless adoption of the new intranet solution through a structured training programme.





Key Initiatives

Detailed Requirements Review

We conducted a thorough review of the requirements and use cases for the company intranet to ensure that the objectives could be met using standard SharePoint features.

Build and Delivery

- Phase I Deployment
 We built and delivered a live Phase I
 company hub with the required security
 and access model. This phase included
 the creation of a user-friendly interface
 and the integration of essential features
 to support the client's communication
 needs.
- Restructuring Support
 We supported the client with any necessary restructuring of the SharePoint estate to accommodate the new intranet.
- Phase II Deployment
 Feedback from the initial Phase was incorporated into a final deployment of the intranet solution prior to roll out across the company.

Training and Support

We trained the client's content owners to create and publish content on the company hub ensuring they could maintain the intranet effectively going forward.

Microsoft 365 Technologies Used

SharePoint Online

The core platform for the intranet solution, providing a modern design, improved navigation, and enhanced functionality.

Microsoft Teams

Used for collaboration and communication during the project.

Power Automate

Implemented for automation of workflows and processes.

Key Deliverables

Company Hub

A SharePoint-based intranet solution designed to serve as an all-staff information and communication hub.

Security and Access Model

A robust security framework to protect sensitive information and ensure appropriate access levels.

Training Materials

Comprehensive training for content owners to manage and maintain the portal.



Outcomes

Enhanced Communication

The new intranet solution significantly improved internal communication, providing a centralised platform for sharing important information and updates.

Increased Productivity

The adoption of SharePoint and Microsoft 365 technologies enabled the client's staff to collaborate more effectively and work from anywhere with a better and more productive experience.

Successful Adoption

The structured training programme ensured that the client's staff were well-equipped to use the new intranet solution, leading to a smooth transition and high user adoption.

Conclusion

The SharePoint intranet solution for the client has yielded significant positive benefits and outcomes. The company hub has greatly enhanced internal communication by providing a centralised platform for sharing important information and updates. The adoption of SharePoint and Microsoft 365 technologies has increased productivity, enabling staff to collaborate more effectively and work from anywhere with a better and more productive experience. Additionally, the structured training program ensured a smooth transition and high user adoption, equipping the client's staff with the necessary skills to maintain and utilise the new intranet solution effectively. The project successfully met its objectives, resulting in a more connected and efficient organisation.





Transforming Digital Collaboration: A SharePoint Intranet Success Story

The client is a global non-profit humanitarian organisation dedicated to ending world hunger. With a presence in over 50 countries, they implement programs that address the root causes of hunger, respond to emergencies, and advocate for policies that create lasting change. They work tirelessly to save the lives of malnourished children and provide communities with access to safe water and sustainable solutions to hunger.

The Challenge

The client faced the critical task of modernising their digital infrastructure to enhance collaboration and efficiency across their global operations. The existing SharePoint implementation, managed by their Spanish office, needed to be migrated to a new SharePoint environment within the client's UK Microsoft 365 tenant.

This migration required not only the seamless transfer of content but also the implementation of enhanced functionalities such as improved search capabilities and metadata tagging. Ensuring that staff could effectively adopt and utilise the new system through comprehensive training was also essential to the project's success.





Project Objectives

Migration

Transition content from the existing
SharePoint estate managed by the client's
Spanish office to a new SharePoint
environment within the client's UK Microsoft
365 tenant.

Adoption Programme

Develop and deliver a training programme to ensure smooth adoption and effective use of the new SharePoint environment.

Enhanced Functionality

Improve search functionality, metadata tagging, and overall user experience.

Approach

Assessment and Planning

- Conducted a thorough assessment of the existing SharePoint environment and identified key requirements for the new intranet solution.
- Developed a detailed project plan outlining the migration process, training programme, and timeline.

Migration

 Migrated documents and business information from the legacy SharePoint environment to the new SharePoint environment. Ensured that the new environment was configured to meet the client's specific needs, including enhanced search capabilities and metadata tagging.

Development

- Utilised Microsoft 365 technologies such as SharePoint, Microsoft Teams, Power Apps, and Power Automate to develop and customise the new intranet solution.
- Implemented SharePoint Security Groups to manage permissions and access levels for different user groups.

Adoption Programme

- Developed a comprehensive training programme to educate the client's staff on the new SharePoint environment and its features.
- Provided ongoing support and training to ensure effective use and continuous improvement.

Microsoft 365 Technologies Used

SharePoint

For document management, collaboration, and intranet development.

Microsoft Teams

Project communication and collaboration.

Power Apps

Custom applications for specific business processes.

Power Automate

Automating workflows to enhance efficiency.



Outcomes

Successful Migration

Seamless transition of content from the legacy environment to the new SharePoint environment.

Improved User Experience

Enhanced search functionality and metadata tagging improved the overall user experience.

Effective Adoption

Comprehensive training programme ensured that the client's staff were well-equipped to use the new intranet solution effectively.

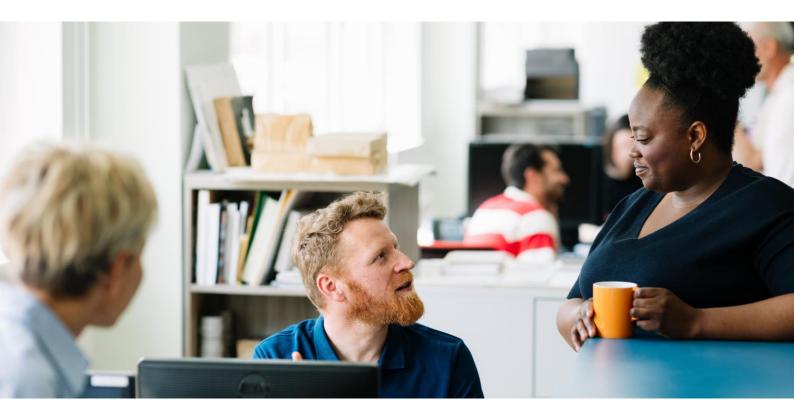
Ongoing Support

Continuous support and development services provided to ensure the intranet solution remains up-to-date and meets evolving needs.

Conclusion

The client's SharePoint intranet solution project successfully achieved its objectives of migrating existing content, enhancing functionality, and ensuring effective adoption through comprehensive training. The seamless transition to the new SharePoint environment, coupled with improved user experience and ongoing support, has empowered the client's staff to utilise the intranet solution efficiently.

This project not only modernised the client's digital infrastructure but also reinforced their commitment to leveraging technology for humanitarian efforts.





Transforming Communication: A SharePoint Intranet Solution for Care Givers

The client is a leading provider of personalised and compassionate home care services. They offer a range of support options, including visiting care, live-in care, overnight care, and 24-hour care, tailored to help individuals maintain their independence and quality of life at home.

The Challenge

The client sought to enhance its internal communication and information sharing through a robust intranet solution.

With a diverse and dispersed workforce, they needed a centralised platform to streamline their operations and improve employee engagement.

Project Scope and Objectives

Our collaboration with the client involved the development and implementation of a SharePoint-based intranet solution. The project aimed to provide a single location for staff to access information, news, documents, and other important resources. Project objectives included:

Enhance Internal Communication

Create a centralised platform for sharing important information and updates.





Increase Employee Engagement

Develop a user-friendly interface to encourage higher employee engagement and participation.

Improve Operational Efficiency

Streamline communication processes and restructure the SharePoint estate to contribute to overall operational efficiency.

Our Solution

We proposed and implemented a SharePoint-based intranet solution designed to serve as an all-staff information and communication hub. Key components:

Modern Design and Navigation

The intranet featured a modern design with improved navigation to provide a better user experience.

Robust Security Framework

A security model was implemented to protect sensitive information and ensure appropriate access levels.

Comprehensive Training

We provided a blended training approach with online resources, expert training, and on-site clinics post-data migration.

Microsoft 365 Technologies Used

SharePoint

The primary platform for the intranet solution, providing document management

and collaboration capabilities.

Microsoft Teams

Facilitated communication and collaboration among the project team and the client's staff.

Outcomes

Enhanced Communication

The SharePoint intranet significantly improved internal communication, providing a centralised platform for sharing important information and updates.

Increased Engagement

The user-friendly interface and accessible content encouraged higher employee engagement and participation.

Operational Efficiency

The restructuring of the SharePoint estate and the streamlined communication processes contributed to overall operational efficiency.

Conclusion

The implementation of the SharePoint-based intranet solution successfully addressed the client's challenges by enhancing internal communication, increasing employee engagement, and improving operational efficiency. The modern design, robust security framework, and comprehensive training ensured a smooth transition and effective use of the new platform. As a result, the client now benefits from a centralised hub that supports their mission of providing personalised and compassionate home care services.





From Legacy to Leading-Edge: Modernising Job Tracking with Microsoft 365

The client is a leading provider of assistive technology, offering products like stairlifts, hoist systems, and automatic door openers. They serve private individuals, care homes, and local authorities with professional installation and 24/7 support.

The Challenge

The client faced several challenges with their existing digital infrastructure, particularly with their legacy job tracking application. The issues included inefficiencies in tracking job progress, managing alerts, and handling management information. Additionally, there were problems with data consistency and the need for better automation and integration of their Microsoft 365 components.

Our Solution

Our collaboration with the client involved several key initiatives aimed at improving their digital infrastructure and operational efficiency.

The project included an initial development of a new Job Tracker App and subsequent follow-on developments to extend and enhance the solution.





Job Tracker App Development

Consultancy and Development Activities

We shadowed the client's team to understand and document issues with their existing solution. This involved workshops to identify key warnings, alerts, and management information for a new dashboard.

Prototype and Implementation

A prototype Job Tracker App was built and tested, followed by enhancements based on feedback. The final app was installed into the live environment, supporting day-to-day business use cases.

Training and Support

We provided training for the client's team on using the new Job Tracker App and offered 30 days of inclusive support post-delivery.

User Guide Development

A comprehensive user guide for the Job Tracker App was created, detailing the configuration, registers, templates, and various functionalities of the app. This guide ensured that the client's team could effectively use and maintain the system.

Follow-on Developments

We continued to support the client with ongoing maintenance and development services, delivering enhancements to existing Microsoft 365 components and developing new ones to support their business growth and initiatives. Some of the follow-on developments included:

Enhanced Support for Purchase Order Management

This included additional functionality to support the purchase order process.

Inspections Support

Enhancements to the solution to support inspections alongside service and warranty.

Engineers App and Surveyors App

Development of specific apps to support the work of the client's engineers and surveyors.

Microsoft 365 Technologies Used

SharePoint

Used for creating and maintaining data lists, reporting capabilities, and direct data management.

Power Apps

Developed the Job Tracker App and other management apps to streamline operations.

Power Automate

Implemented workflows to automate processes and improve efficiency.



Outcomes

Improved Operational Efficiency

The new Job Tracker App and enhanced Microsoft 365 components streamlined the client's operations, reducing manual processes and increasing automation.

Enhanced User Experience

The Job Tracker App User Guide empowered the team to effectively manage their systems, ensuring smooth and efficient operations.

Ongoing Support

Continuous support and maintenance ensured that the client's systems remained functional and up-to-date, providing a reliable digital infrastructure for their business.

Conclusion

In conclusion, the collaboration has significantly benefited the client. The new Job Tracker App and Microsoft 365 enhancements have streamlined processes and increased automation, boosting operational efficiency. Ongoing support and maintenance ensure the client's digital infrastructure remains reliable and supports business growth.





Harnessing Power Platform: Innovative Solutions for a Community Interest Company

The client is a leading Community Interest Company based in Suffolk, that provides employment, learning, and development opportunities for individuals facing barriers to work. Their mission is to enhance the economic and social wellbeing of disadvantaged or disabled individuals across Suffolk and Essex.

The Challenge

The client was awarded a new contract by a local authority that aimed to provide coaching and support to long-term unemployed or economically inactive adults with barriers to learning and employment. The new service had a deadline for launch, requiring the recruitment of a new coaching team and the establishment of rigorous processes and controls to meet contract requirements and regulations such as GDPR.

The client faced major challenges.

Tight Timeline: The service needed to be operational within a few months.

Complex Requirements: The solution had to support the delivery of the coaching contract and comply with various regulations.

Scalability: The system needed to be adaptable to future needs and scalable to support additional services.





Our Solution

The client and their IT provider investigated CRM systems but these lacked adaptability and cost-effectiveness. We therefore developed a tailored solution using Microsoft 365 technologies to support the new contract. Key components included:

Optimised Database

A SharePoint database architecture to support all processes and information relating to delivery of the contract.

Coaching Service Application

A comprehensive app solution designed to enable delivery and tracking of the coaching service.

User Acceptance Testing (UAT)

A detailed UAT plan to ensure the solution met the requirements.

Microsoft 365 Technologies Used

Power Apps: Used to develop a comprehensive app solution to support the delivery of the contract.

SharePoint: Facilitated document management and collaboration, integrated with Power Apps to enhance functionality.

Microsoft Teams: Enhanced collaboration among the coaching team.

Power Automate: Automated processes, reducing manual effort and increasing efficiency.

Microsoft Forms: Used for capturing client information and feedback.

Outcomes

Successful Contract Delivery

The ability to support the roll out and ongoing management of the new coaching contract, within tight timeframes.

Improved Operational Efficiency

The new solution significantly improved the client's operational efficiency, reducing manual processes and increasing automation.

Continuous Improvement

A standalone development environment allowed for ongoing enhancements and support without disrupting live operations.

Conclusion

The client's development project has demonstrated significant positive benefits and outcomes. By leveraging Microsoft 365 technologies, the client achieved improved operational efficiency, enhanced user experience, and continuous improvement. The tailored solution not only streamlined processes and reduced manual effort but also provided a scalable and adaptable system to support future needs. Overall, the project has successfully empowered the client to better serve individuals facing barriers to employment, contributing to their mission of enhancing economic and social wellbeing.



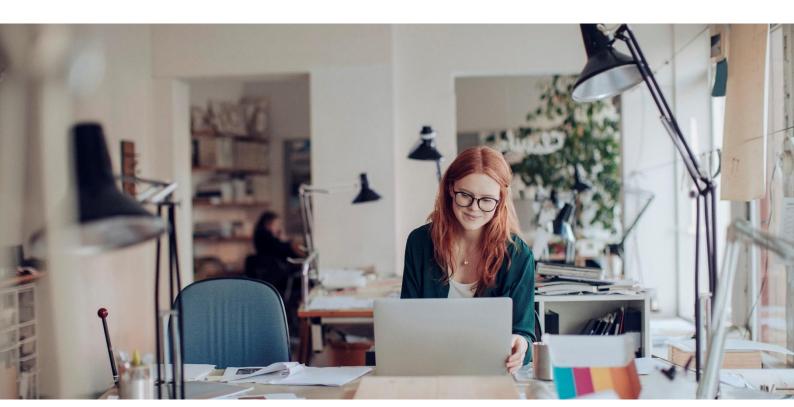
Enhancing Efficiency with Microsoft Power Platform: A CRM Success Story

The client is a leading provider of business support and training services across Suffolk and Norfolk. They offer a range of fully funded programs designed to assist new, emerging, and existing microbusinesses from pre-start to long-term growth. Their services include one-to-one coaching, group sessions, advice on business grants and loans, and access to co-working and meeting spaces.

The Challenge

The client struggled with operational inefficiencies due to the absence of a centralised Customer Relationship Management (CRM) system. They relied on spreadsheets and manual processes to manage client data and track program engagement, leading to data inconsistencies

and time-consuming administrative tasks. This fragmented approach hindered their ability to effectively support clients and deliver services, highlighting the need for a streamlined, automated solution to enhance service delivery and operational efficiency.





Our Solution

Our collaboration with the client involved the development and implementation of a comprehensive CRM solution using Microsoft Power Platform. The primary objectives were to support their training and business support services, improve data management, and enhance reporting capabilities. The project included the following key initiatives:

Discovery Workshops

We conducted a two-day engagement where we spent a full day on-site with the client's team to walk through their business processes in more detail and provide insights into the solutions we have built.

CRM Solution Development

The CRM solution aimed to create a single consolidated view of a client showing the client's programmes and products a client has engaged with. This significantly reduced the need to use individual spreadsheets to track programme and product uptake and removed the over-reliance on individual client staff per programme.

- The solution enhanced and simplified the production of key reporting metrics required internally by the client and externally by funding partners.
- We developed a secure portal that provides partners with controlled access to relevant information relating to the programmes they are engaged on.

 The solution improved the capabilities to update and track individual attendance at the client's interventions.

Microsoft 365 Technologies Used

Power Apps

Used to build custom apps for managing client data and interactions.

Power Automate

Used to automate workflows and streamline processes.

SharePoint

Used for CRM data, document management and collaboration.

Microsoft Teams

Used for communication and collaboration among the client's team members.

Conclusion

Our partnership with the client successfully addressed their operational inefficiencies by implementing a comprehensive CRM solution using Microsoft Power Platform. This solution streamlined their processes, improved data management, and enhanced reporting capabilities. Follow-on developments further strengthened their operational efficiency and scalability. By leveraging Microsoft 365 tools, the client can now effectively support their clients and deliver services with greater accuracy and efficiency.



Mobile App Development: Streamlining Operations and Enhancing Compliance

The client is a UK-based company specialising in the refurbishment of military, industrial, and commercial buildings, which has successfully completed over 3,000 contracts both domestically and internationally. Their expertise includes roofing, cladding, asbestos removal, and comprehensive building overhauls, ensuring minimal disruption to ongoing activities.

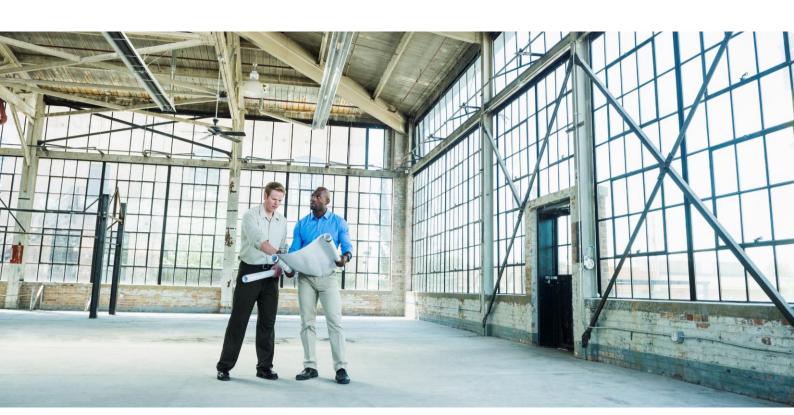
The Challenge

The client faced several challenges in managing their health and safety and accident reporting processes. They relied on paper forms and manual workflows that were time-consuming, error-prone, and inefficient. They lacked visibility and accountability of the health and safety and accident data across their projects and sites. They needed a solution that would enable

them to streamline their processes, improve their compliance, and enhance their performance.

Our Solution

Our collaboration with the client involved the development of a suite of mobile applications aimed at streamlining their operations and improving efficiency.





Mobile App Development

Unified App Design

We designed a single mobile app that consolidated the functionality of multiple existing apps. This approach reduced the need for users to switch between different apps and provided a seamless user experience.

Modern Controls and Performance Optimisation

The app was developed using modern controls to enhance performance and ensure it runs efficiently on mobile devices. We aimed to create screens with minimal controls to render faster and consume less memory.

User-Friendly Navigation

The app featured two main screens, "Projects" and "Personnel," each with a searchable gallery of active projects and personnel. Quick links were provided for easy access to frequently used features.

Health and Safety Reporting

Power Apps and Power Automate Integration

We developed a customised solution using Power Apps and Power Automate to streamline the client's health and safety and accident reporting processes. This solution allowed staff and contractors to capture and submit information from their mobile devices, triggering notifications, approvals, and actions based on the submitted data.

Improved Compliance and Performance

The automated solution provided better visibility and accountability of health and safety data across the client's projects and sites, enhancing compliance and overall performance.

Key Deliverables

Mobile App

A unified mobile app with modern controls and optimised performance, featuring screens for projects and personnel.

Health and Safety Reporting Solution

A Power Apps-based reporting tool integrated with Power Automate for automated workflows and notifications.

Ongoing Support and Maintenance

Continuous support for the developed Microsoft 365 components, including SharePoint sites, Power Apps, and Power Automate workflows.



Microsoft 365 Technologies Used

SharePoint

Used for creating and maintaining data lists, reporting capabilities, and direct data management.

Power Apps

Used to develop the mobile app solution.

Power Automate

Implemented workflows to automate processes and improve efficiency.

Outcomes

Enhanced Operational Efficiency

The unified mobile app streamlined the client's operations, reducing the need for multiple apps and improving user experience.

Improved Health and Safety Compliance

The automated reporting solution provided better visibility and accountability, ensuring compliance with health and safety regulations.

Conclusion

The mobile app development for the client has significantly improved operational efficiency and health and safety compliance. The unified app streamlined processes, while the automated reporting solution enhanced accountability. Continuous support ensures ongoing improvements, aiding the client's business growth and commitment to high-quality projects.





Transforming Efficiency: Power Platform Redevelopment for a Specialist Consultancy

The client is a London-based consultancy firm specialising in economic and financial analysis for the energy and infrastructure sectors. They provide independent advice on regulatory economics, market design, decarbonisation policy, and investment planning. Their expertise spans electricity, natural gas, water, and wastewater sectors, helping industry and government clients navigate complex economic and policy challenges.

The Challenge

The client faced several challenges with their existing Power Platform solutions which had been developed in-house. They needed to stabilise and enhance their core Admin App for better project management and timesheet recording. Additionally, their invoice management process was inefficient, requiring a new generation and control

system. The client also experienced disruptions due to Power Automate workflow failures, which needed resolution to ensure smooth operations





Project Scope

The client engaged us to support and enhance their Power Platform solutions to improve operational efficiency and data management. Our collaboration with them involved two key phases: initial support for their existing Power Platform solution and a comprehensive redevelopment to deliver a more efficient version. The primary focus areas included:

Initial Support and Stabilisation

Core Admin App Support
 Initially, we supported the core Admin
 App built in-house by the client, focusing on improving stability and increasing functionality in key areas such as Project Management and Timesheet recording.

Comprehensive Redevelopment

- New Standalone Apps
 We created new standalone apps for
 various key functions, including projects,
 utilisation, and KPIs. Each app included
 new design and branding,
 documentation, and naming standards.
- Enhanced Admin App Functions
 Post-creation of standalone apps, we implemented branding, naming standards, and other enhancements to the remaining Admin App functions.
- Invoice Management
 We implemented a new project invoice

generation and control process, triggering invoice generation and auto-populating invoice templates. Additionally, we developed a new Associate invoice approval process, including a Finance Director approval dashboard.

Microsoft 365 Technologies Used

Power Apps

Utilised for building custom business applications, including the core Admin App and standalone apps for various functions.

SharePoint

Used for data storage and management, integrated with Power Apps to enhance functionality.

Power Automate

Implemented for automating workflows, including invoice generation and approval processes.

Conclusion

The redevelopment of Power Platform solutions for the client has significantly improved their operational efficiency and data management. By stabilising existing systems and creating new standalone apps, we streamlined project management, timesheet recording, and invoice processes. These enhancements have led to a more cohesive and professional user experience, ensuring smooth and efficient operations for the client.



Transforming HR Management and Operations: A Microsoft 365 Solution

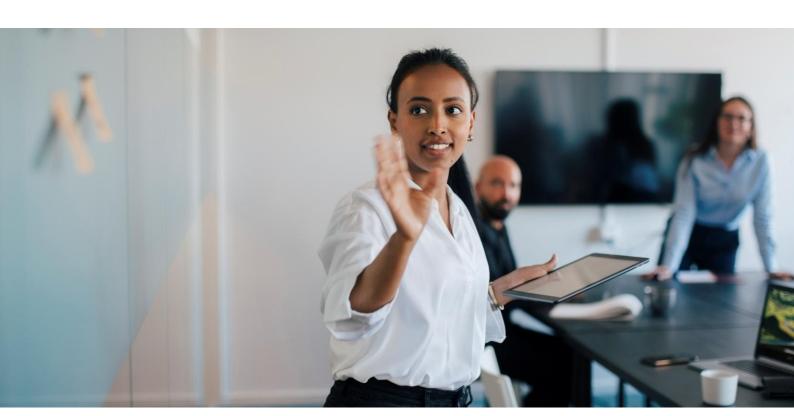
The client is a prominent Community Interest Company located in Suffolk, focused on providing employment, learning, and development opportunities for individuals facing work-related challenges. Their mission is to improve the economic and social wellbeing of disadvantaged or disabled individuals throughout Suffolk and Essex.

The Challenge

The client needed a comprehensive HR system to optimise their operations and improve service delivery. Our partnership involved creating and implementing an enterprise HR solution. The main goals were to enhance their HR processes, improve data management, and boost reporting capabilities.

The client faced several issues with their existing HR system, such as:

- Inefficient data management and reporting.
- · Poor integration with other systems.
- Limited functionality and flexibility.





Our Solution

Working closely with the client's HR team, we developed a bespoke HR management solution using Microsoft 365 technologies, including SharePoint, Power Apps, and Power Automate. The client named their new HR solution "Nexus".

The project included the following key initiatives:

Development from Scratch

We designed and developed the Nexus HR management solution from the ground up, ensuring it met the specific needs of the client.

Data Migration

We documented and executed a detailed data migration plan, ensuring a smooth transition from the old HR system to Nexus.

User Acceptance Testing

Created and executed a comprehensive User Acceptance Testing (UAT) plan to ensure the delivered components met the requirements and were ready for deployment.

Ongoing Support and Enhancements

Provided continuous support and updates to ensure the system operated smoothly and met evolving requirements. This included addressing issues such as version updates and resolving user-reported problems.



Microsoft 365 Technologies Used

SharePoint

As the core HR database and for document management and collaboration.

Power Apps

For building custom applications to meet specific HR needs.

Power Automate

For automating workflows and processes.

Outcomes

- Improved data management and reporting capabilities.
- Enhanced functionality and usability of the HR system.
- Streamlined HR processes and increased efficiency.
- Ongoing support and continuous improvements to meet evolving needs.

Conclusion

By leveraging Microsoft 365 technologies, we were able to deliver a robust and flexible HR system that not only streamlined HR processes and improved data management but also enhanced reporting capabilities and overall system usability. The ongoing support and continuous improvements ensured that the solution remained scalable and adaptable to meet the evolving needs of the client, ultimately contributing to their mission of social impact.

Enhancing Compliance and Efficiency: Success in Financial Services with Microsoft 365

The client is a UK-based investment firm specialising in public market equity fund management. They are regulated by the Financial Conduct Authority (FCA) and adhere to stringent financial and operational standards, ensuring robust risk management and compliance.

The Challenge

The client was struggling with fragmented systems that made regulatory compliance and task management inefficient. The lack of a centralised platform hindered their ability to ensure regulatory adherence, track tasks, and provide oversight.

Project Overview

The project involved the implementation of a comprehensive regulatory compliance platform, the development of an operational task management solution, and the creation of a suite of mobile compliance apps.

The project was divided into three main phases based on this development roadmap.





Phase 1: Regulatory Compliance Platform

Objective

To implement a robust regulatory compliance platform within the client's Microsoft 365 environment.

Solution

A bespoke compliance portal was developed and installed into the client's Microsoft 365 tenant. This portal included features for compliance monitoring, oversight dashboards, and compliance officer rooms.

Microsoft 365 Technologies Used

SharePoint, Power Automate, and Power Apps were utilised to create and manage the compliance portal, automate workflows, and generate compliance reports.

Outcome

The compliance portal provided the client with a centralised platform for managing compliance activities, ensuring regulatory adherence, and improving oversight capabilities.

Phase 2: Operational Task Management Solution

Objective

To develop a task management solution for the creation, tracking, and reporting of operational tasks.

Solution

Task Management Application

A task management application was developed to address the primary requirement of creating and managing tasks. This application was available on both desktops and mobile devices.

Governance Dashboard

A centralised task governance dashboard was created to provide company-wide management information on tasks and enhanced capabilities for governance reporting.

Microsoft 365 Technologies Used

SharePoint was used to create the task management site, while Power Apps was employed to develop the task management application.

Outcome

The operational task management solution streamlined task creation and tracking, improved task visibility, and enhanced governance reporting across the client.

Phase 3: Mobile Compliance Apps

Objective

To develop a suite of mobile compliance apps to complement the existing compliance dashboard and operational task management solution.



Solution

Mobile Compliance Apps

Several mobile apps were developed to provide the client's employees with access to compliance services on their mobile devices. These apps included features for PA trading, gifts and benefits, personal disclosures, and declarations.

Integration with Existing Solutions

The mobile apps were integrated with the existing My Compliance Dashboard and operational task management solution to ensure a consistent user experience.

Microsoft 365 Technologies Used

Power Apps was used to develop the mobile apps, leveraging its integration and extendibility capabilities.

Outcome

The mobile compliance apps enabled the client's employees to manage compliance tasks on the go, improving accessibility and efficiency.

Conclusion

The implementation of the regulatory compliance platform, task management solution, and mobile compliance apps for the client has significantly enhanced their compliance capabilities and operational efficiency. By leveraging Microsoft 365 technologies, we provided a centralised compliance platform, streamlined task management, and improved mobile accessibility. These solutions have ensured regulatory adherence, improved oversight, and increased overall user experience.





Transforming Operations: Integrating Legacy Systems for Enhanced Efficiency

The client is a Community Interest Company based in Suffolk, providing employment, learning, and development opportunities for individuals facing barriers to work. Their mission is to enhance the economic and social wellbeing of disadvantaged or disabled individuals across Suffolk and Essex.

The Challenge

The client had been using two separate solutions to manage their coaching and learning services.

These solutions operated independently, storing data in separate SharePoint sites, which restricted visibility and created inefficiencies.

Project Objectives

The goal of this project was to merge the functionality and data of the two legacy systems into a single, more usable solution.

This new integrated solution aimed to provide a holistic view of an individual's journey and streamline operations.





Requirements included:

Data Integration

Merging data from two separate systems while ensuring data integrity and consistency.

User Experience

Creating a seamless user experience for the client's staff and partners.

Scalability

Ensuring the new solution could support future contracts and additional services.

Compliance

Adhering to GDPR and other regulatory requirements.

Our Solution

Working closely with the client, we undertook the following steps to achieve the project goals:

Requirements Gathering

Collaborated with the client to understand their needs and define the requirements for the new integrated solution.

Solution Design

Designed a conceptual and app design that would merge the functionality of the two legacy systems, creating a single platform for managing participants, contracts, courses, and coaching sessions.

Data Migration

Developed a comprehensive data migration plan to ensure a smooth transition of data from the old systems to the new integrated solution.

Development and Testing

Utilised a standalone development environment to build and test the new solution, ensuring stability and continuous improvement.

User Acceptance Testing (UAT)

Conducted detailed UAT to ensure the solution met the requirements and provided a user-friendly experience.

Microsoft 365 Technologies Used

SharePoint

Used for storing and managing coaching folders and central records, providing partners with direct access to necessary documents

Power Apps

Developed a new integrated app solution that included the data and functionality of the two legacy systems.

Power Automate

Automated workflows for booking confirmations and other processes, enhancing operational efficiency.

Microsoft Teams

Facilitated collaboration and communication among project stakeholders.



Outcomes

Improved Operational Efficiency

The new database and enhanced apps significantly improved the client's operational efficiency, reducing manual processes and increasing automation.

Enhanced User Experience

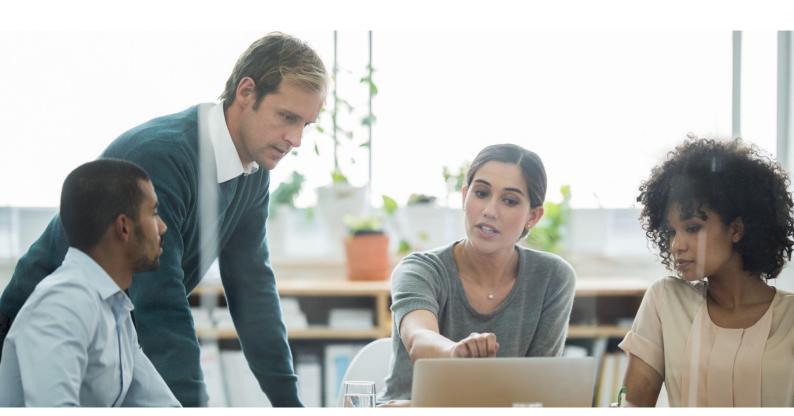
The redeveloped app solution provided a more user-friendly interface and better performance, leading to higher user satisfaction.

Continuous Improvement

The standalone development environment allowed for ongoing enhancements and support without disrupting live operations.

Conclusion

The integration of the two legacy systems into a single solution has greatly improved the client's operations. By merging data and functionality, we provided a comprehensive view of each individual's journey, enhancing visibility and efficiency. The new solution streamlined operations, ensured data integrity, compliance, and scalability for future growth. Utilising Microsoft 365 technologies like SharePoint, Power Apps, Power Automate, and Microsoft Teams facilitated better collaboration, improved user experience, and operational efficiency.







Transforming HR Operations: A Case Study on SoHR Implementation

The client is a multi-service charity dedicated to providing stability, support, and challenge to individuals, enabling them to realise their full potential. They offer a range of services focused on helping people maintain housing, stay safe, be heard, and improve their health and wellbeing.

The Challenge

The client faced significant challenges with their existing HR processes, which were largely paper-based and inefficient.

The need for a modern, flexible, and integrated HR management solution became evident, especially during the lockdown period when remote work became essential.

Our Solution

The client selected our HR management solution, SoHR, as the new platform to support their HR operations. SoHR is a cutting-edge HR solution designed to streamline and enhance human resource management. It offers a comprehensive suite of tools that simplify HR management and employee engagement processes. SoHR has been developed using standard Microsoft 365 technologies so it can be tailored to meet unique HR needs.





Why the Client Chose SoHR

The client highlighted the inefficiencies of their paper-based system and the need for a more adaptable solution. Off-the-shelf products were too rigid and generic for their unique requirements, such as flexible work timetables and complex TUPE transfers. The client decided to implement SoHR to benefit from its customisability and seamless integration with Microsoft 365.

Implementation

The implementation of SoHR involved several key steps:

Discovery and Requirements Gathering

A comprehensive discovery session was conducted with the client's management to understand their specific needs. This was followed by a workshop with the HR team to refine the scope and requirements.

Design and Development

The solution was designed using standard Microsoft 365 services, including SharePoint, Power Apps, and Power Automate. Custom components were developed to address the client's unique requirements.

Installation and Configuration

The installation process involved setting up the core SoHR modules and custom features.



Training and Support

The client's staff received training on using the new system, and ongoing support was provided to ensure smooth operation.

Key Features and Benefits

Integrated and Secure

SoHR operates within the Microsoft 365 environment, ensuring data security and seamless integration with other tools.

Customisable

The system was tailored to meet the client's specific needs, including flexible work schedules and TUPE transfer management.

User-Friendly

Staff can book holidays, submit expenses, and access HR information online from anywhere, enhancing accessibility for remote workers.

Efficient Management

Managers can easily approve requests, monitor absences, and generate reports. The HR team can manage employee data, contracts, appraisals, and training records in one place.

Follow-On Developments

Following the successful implementation of SoHR, the client expressed interest in further enhancing their HR capabilities. This led to the upgrade of their HR solution which now includes additional custom changes and a comprehensive support element.

Microsoft 365 Technologies Used

SharePoint, Power Apps, and Power Automate are all core technologies that underpin SoHR's development.

SharePoint

For data records, document management and collaboration.

Power Apps

For SoHR's core applications and to create custom features tailored to the client's requirements.

Power Automate

For automating data access, workflows and processes.

Microsoft Teams

For communication and collaboration during the project.

Conclusion

The implementation of SoHR has significantly transformed the client's HR operations, moving them from inefficient paper-based processes to a modern, integrated, and flexible HR management system. The customisable features of SoHR, combined with its seamless integration with Microsoft 365 technologies, have addressed the client's unique requirements and enhanced their overall HR capabilities.

The positive feedback and testimonial from the client underscores the success of the project, highlighting the improved accessibility, efficiency, and support provided by SoHR.





Connect

Ready to transform your business with So365's Microsoft 365 solutions? Contact us today to discover how we can help you achieve your goals and drive success.

About So365

Our goal is to help you work smarter, not harder, by enhancing your Microsoft 365 experience with our services.

Process Automation with Power Automate

Automate workflows and reduce manual tasks, allowing you to focus on what matters.

Modern Communication with SharePoint Intranets

Create a central hub for news, resources, and updates to foster a connected workplace.

Custom Applications with Power Apps

Develop tailored applications for mobile and desktop to meet your unique business needs.

Expert Advice and Guidance

Maximise the impact of Microsoft 365 services like SharePoint and Teams with our expert help.

info@so365.com www.so365.com

