GROW mental wellbeing programs

Australian NFP improves on **document search and collaboration** with a **new modern SharePoint** intranet

Client Business Description

GROW is a community-based organization that helps Australians recover from mental illness through a unique program of peer-to-peer support and personal development. It is a free program available to anyone and based on a 12 Step Recovery Program that provides peer-to-peer support, motivation, and empowerment enabling members to take action to change their circumstances in a structured and supportive environment.

Requirement

The Australian NFP client GROW had employees in 11 different departments like Corporate Services, ELT, HR, Finance, & Grow Programs and they used a common SharePoint document library to store important documents.

Separate folders for each functions were created on this common site and everyone uploaded new documents here. This eventually resulted in a cluttered document repository where users often didn't know where they could find the documents and information they needed.

With 60+ employees and growing, it was not possible to keep using the common SharePoint document library for their daily document and information needs.

Client Speaks

I like to say that working with Beyond Key is a pleasure at every level. I believe that their real strength is in their relationship management with their clients which has been exemplary.

And also their technical skill to do all of the things. One of the things that made me really happy about working with Beyond Key has been their efficiency in which they worked with us. It's very important to our organization that we work in a collaborative relationship framework. We don't want to work in a traditional contractor relationship.

So for us it was important that they understood our unique business. Their project manager was able to interpret our requirements well and ensure that everyone understood what we were asking.

Julie Ling
General Manager Operations and Product Development

GROW mental wellbeing programs

Challenges

- With over 11 teams and more than 110,000 documents saved on the common SharePoint site, document management was difficult.

- Often different people created multiple versions of the same document and there was no control over redundant documents.

- User access permissions within folders did not work.

- The user adoption rate decreased as the old SharePoint version was not able to keep up with their needs.

Solution

Beyond Key reviewed GROW's existing SharePoint site, content, and web parts in their previous solution. Our Office 365 experts held several meetings with the GROW technical and management team members to understand what kind of structure of intranet would work for their organization.

Together, Beyond Key and GROW determined a strategy to build the intranet in phases. We provided GROW team a couple of layout options to choose the best one to implement.

Here are the steps that we followed -

1 Restructured the complete portal by building multiple sub-sites to the single SharePoint site to enhance efficiency, collaboration, and governance.

2 Analyzed the volume of documents and prepared a plan to organize them properly.

3 Sorted, managed, and cleaned the document repository before re-uploading files back into the system.

4 Developed a plan for a Communication site where everyone could visit and get organization-wide info.

5 Created separate functions sites with relevant access permission.

6 Built document sets for each document, so metadata associated with each document improves internal searches.

7 Finalized the web parts and widgets useful to employees.

How we helped

Intranet Home page or communication site

Beyond Intranet team completely restructured their existing intranet home page and created a communication site that the whole GROW staff could use.

Customized components like the ones below were placed on the home page to give the site a modern look and feel.

ⓑ News web part ⓑ Forms ⓑ NCEO updates ⓑ Calendars ⓑ Quick links

The communication site was built on Modern SharePoint so employees could enjoy a better user experience.
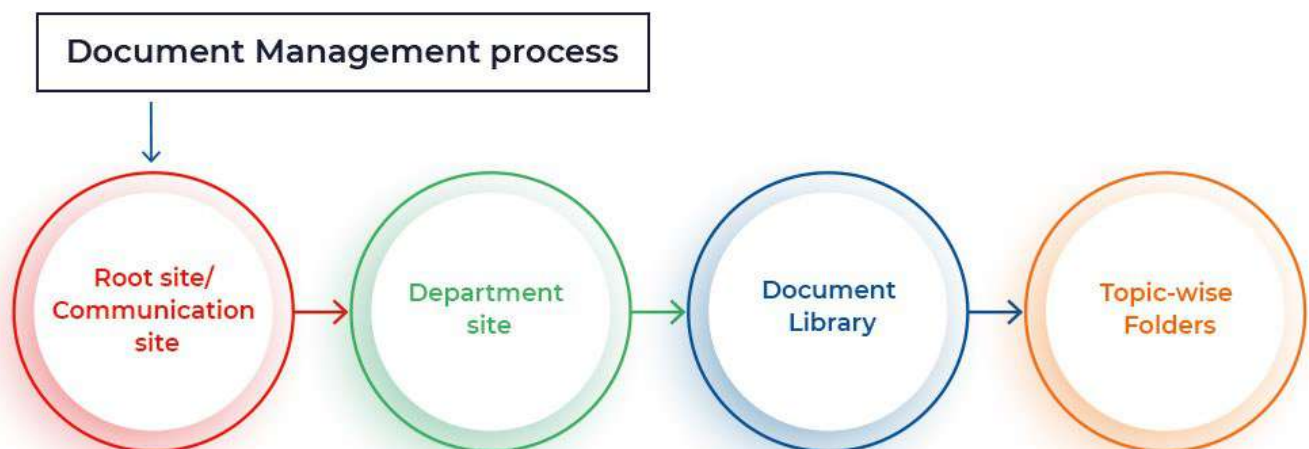
Department sites

We suggested creating sites for each function/department. This helped segregate the document repository and made the search easier. Every site had members who could access that site page. They could add, edit, and view information and documents per their user access permissions.

Document Repository

We mentioned earlier how there were around 110,000 documents saved on one common site. That big of a document library was difficult to manage.

To help, we built a hierarchy of folders, so documents were saved in an organized way. We updated the repository with a root site along with a department site and separate document libraries.

Document Management process

Root site/ Communication site → Department site → Document Library → Topic-wise Folders

User Permissions and governance.

With SharePoint's built-in capability of setting up user access permissions, we gave admins the ability to view, edit, and add new information on their intranet home page as well as various department sites.

Only admins can now update content on various intranet pages. Also, multiple copies of documents were restricted to keep the repository clean and usable.

Finally, we created an admin panel for the client where authorized personnel can make content and image changes.

Powerful Search

To develop the best possible search function, we used the document set feature of SharePoint. A document set is a group of related documents you can manage as a single entity. It improves search results on your intranet. We also used the metadata with every document to make it searchable with relevant results.
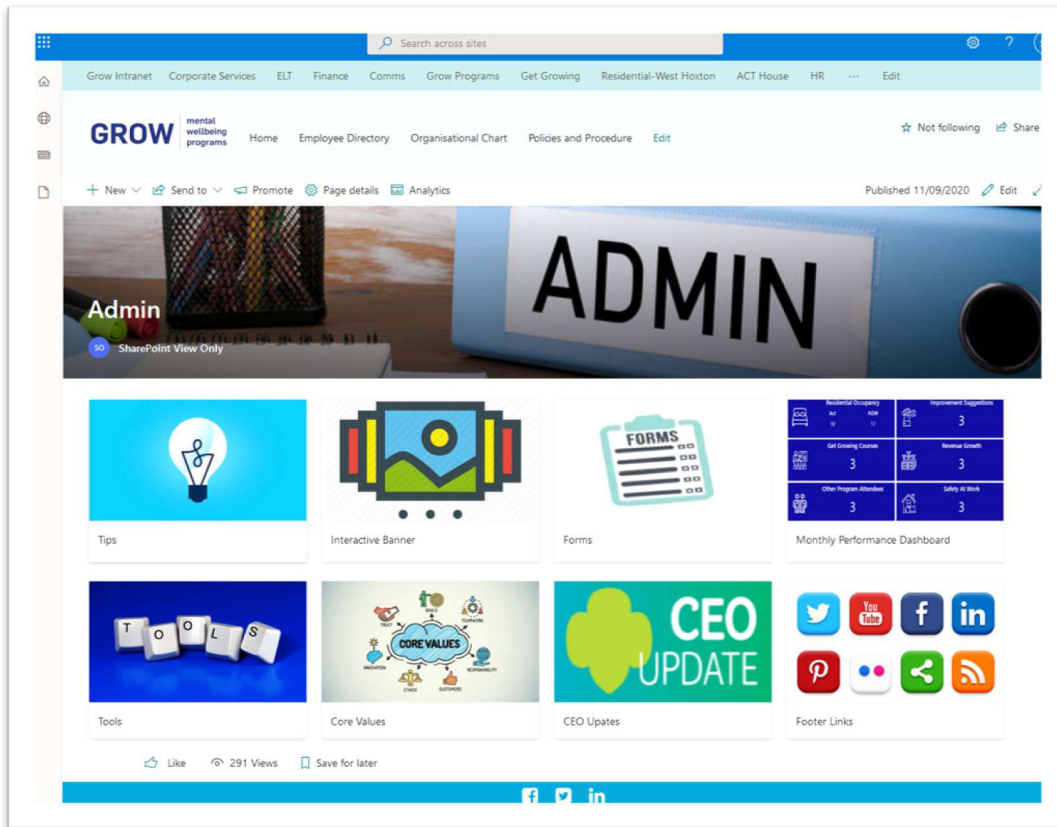
Employee Engagement add-ins

To improve the level of engagement and collaboration amongst the team members, we provided them a couple of employee usage add-ins on their home page like Employee Directory, organizational chart, etc. Employees could access these from the home page navigation bar and could easily find out their co-workers' details.
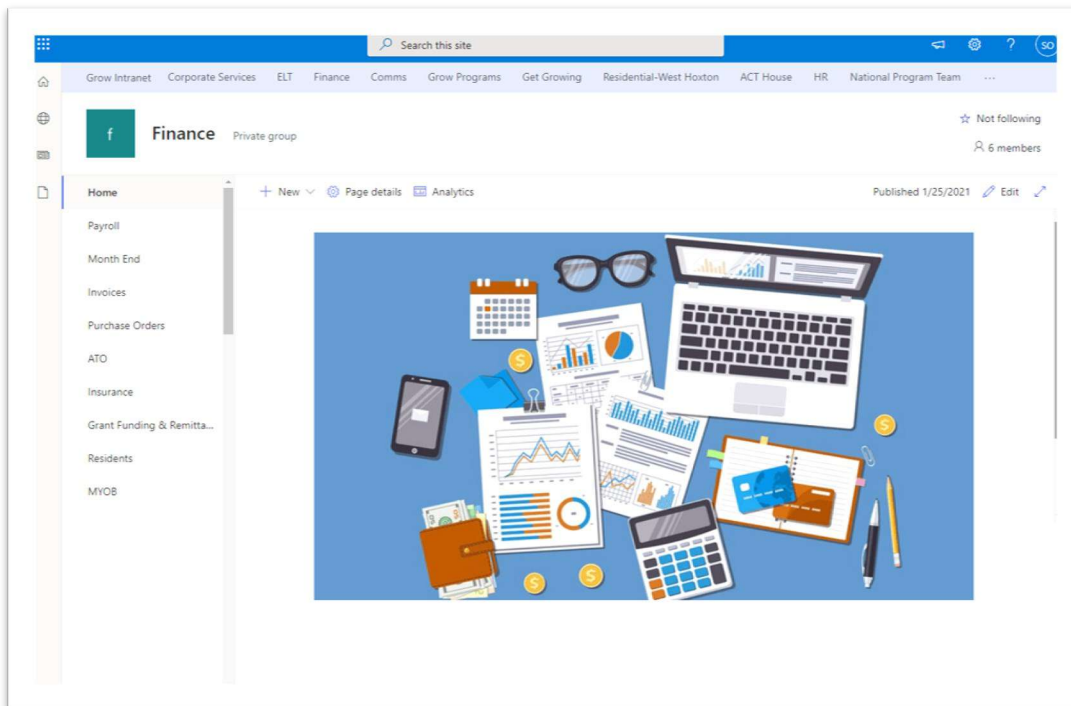
Results

- Grow team got a lightweight and structured modern-looking intranet.

- The refreshed home page reflected a much stronger design aesthetic that enabled the communications team to deliver news, events, and strategic messaging without needing the IT team.

- The communications site provided a ready platform to share broad or targeted messages among employees on Office 365 and SharePoint Online.

- Improved document search and navigation between pages and departments.

- Employees had easy access to information that helped them feel connected to others in the organization.

- Leadership was more confident they were sharing the same message across the whole company.

Screenshots

Admin Panel

Department Site