

# STREAMLINING OPERATIONS AND COMMUNICATION THROUGH A CUSTOM **SHAREPOINT** SOLUTION

## CASE STUDY



# OVERVIEW

Our client is a multidisciplinary **professional services firm** offering accounting, legal, financial, and consultancy services. The company helps businesses and individuals with integrated solutions, simplifying complex legal and financial matters.

## CHALLENGE

### Data Consolidation

The Client had data stored across multiple separate databases, making access and management challenging. A solution was required to display all relevant data in a "single pane of glass," ensuring a single source of truth accessible to all staff. Additionally, the system needed to be flexible enough to allow for additional data input, which could then be synced with other databases for further analysis.

### Communication and Accessibility

An efficient method for communicating company updates and new starter information was essential. Employees needed easy access to this information, along with a system that enabled visibility of colleagues' availability. Filtering staff members based on specific skills was also a priority to enhance collaboration and resource management.

### Access Control

A structured permission system was crucial to maintaining security and control. Certain staff members needed the ability to post company updates, while specific client information had to be read-only for some users but editable for others.

## Automation and Efficiency

Automation was necessary to streamline operations. Specifically, an automated process was required to generate a folder structure in SharePoint whenever a new client was onboarded. This would ensure consistency and efficiency in document management while reducing administrative workload. Additionally, full auditing capabilities were needed to track changes, including who made modifications and when.

## SOLUTION

A tailored digital solution was developed using cloud-based technologies, ensuring flexibility, scalability, and security while addressing the client's core challenges.



### Centralised Data Management

A structured platform was implemented to consolidate company updates and client data, serving as a reliable source of truth. This solution enabled seamless data synchronisation and streamlined access to critical business information while maintaining efficiency and accuracy across departments.



### Improved Communication and Collaboration

A dynamic system was introduced to facilitate internal communication and data sharing. A structured staff directory was designed to improve visibility into team availability and expertise, making collaboration more efficient. Role-based access controls ensured that employees could easily retrieve relevant information without compromising security.



### Process Automation for Efficiency

Automated workflows were developed to reduce manual effort and improve consistency in business operations. This included streamlining document management, minimising administrative overhead, and enhancing productivity through intelligent automation. Key business processes were optimised to ensure seamless information flow between departments.



## Enhanced Security and Access Control

Robust access control measures were implemented to safeguard sensitive business data. Customised permission structures ensured that only authorised personnel could make updates or access specific content. Comprehensive auditing capabilities were also embedded into the system, allowing visibility into modifications and maintaining compliance with internal policies.

## IMPLEMENTATION

- The implementation process took two months to complete after receiving approval. A thorough project scope was developed, with multiple stakeholder meetings ensuring all requirements were fully understood. The scope underwent several revisions before finalisation.
- A dedicated platform was set up to manage company data and internal workflows efficiently. Forms and data structures were designed based on user needs, tested with sample data, and refined based on feedback. Automated workflows were configured to streamline key processes, reducing manual effort and improving consistency across operations.
- To improve usability, specific enhancements were introduced, ensuring that users could easily access relevant information and navigate the system with minimal training. Additional integrations were implemented to optimise staff directory functionalities, improving visibility and collaboration within teams.
- Finally, the system interface was refined, and team training was conducted to ensure smooth adoption. Access permissions were structured to align with business needs, and a technical guide was provided to support long-term system maintenance and scalability.

## OUTCOME

The development of the client's **SharePoint** site was smooth from start to finish. It is rewarding to see how additional functionality has been built upon the initial implementation. Employee engagement with homepage posts is strong, and senior management is now exploring further enhancements based on user feedback.

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