

XTGlobal Optimizes SharePoint Workflows for Payments Tech Solutions Provider



CLIENT INDUSTRY
Financial Services



CLIENT SIZE/STRUCTURE
500+ Employees



PROJECT PARTICIPANTS
CTO, IT Technical Manager



Project Overview

A leading provider of Payment Solutions required expertise in SharePoint Maintenance and Processes, Implementation of Workflows and Configuration of WOPI (Web Application Open Platform Interface) for OneNote to improve their slow, manual workflows and processes.

XTGlobal worked with the client's existing technology and environment to enhance the process that helped the client improve their efficiencies within 3 months.

About the Client

The client is a provider of Innovative Payment Technology Integrations and Acquiring Solutions. Their main services include customized, integrated and standalone payment solutions - EMV solutions, P2P encryption, tokenization, out-of-scope solutions, mobile solutions, and cloud-based POS reporting platforms.

Objectives of the Project

The client was dependent on a manual workflow process that involved sending and managing emails via Outlook. This was not only slow but also had process gaps within the workflows.

Hence, the client was looking for support with regards to:

1. Implementation of Workflows to replace the Manual Workflows
2. SharePoint Maintenance and Processes
3. Configuration of WOPI for OneNote

The solution was to be developed keeping in mind security, quality, timelines, and impact to the business.

Challenges

The client did not have the expertise to understand SharePoint Maintenance and Processes or the health of the farm without a complete analysis.

The client's regional support teams were unable to share information in a shared, managed location until a solution was provided.

The client had internal teams working on the SharePoint project, but they were unable to make much progress due to lack of expertise. They were looking for a consulting partner that would provide not only the expertise but also work with the technology and the environment that the client had in place already.

XTGlobal Enhanced the Client's Processes by:

Providing a senior level SharePoint resource to work with key stakeholders and client services to drive the value proposition and solution.

Implementation of Workflows - Enabled users to properly use Workflows thus improving productivity, accuracy, task tracking and efficiency.

SharePoint Maintenance and Process - Analyzed SharePoint Pro to understand the maintenance process of SPARK and the stability of SharePoint farm health.

Configured WOPI for OneNote - Integrated regional OneNote with SharePoint so all regional sites can utilize SPARK support information.

Governance Model:

XTGlobal implemented a 3-tier Governance Model to work with the client on all the key deliverables to ensure that different levels of communication occur at different frequencies across all 3 tiers as mentioned below:

3-tier Support Levels	Resources Involved	Responsibilities	Main Interactions	Frequency Of Interactions
Strategic	XTGlobal Executive Review Board comprising of VP of Solution Delivery, On-site Project Manager and Sr. Client Solutions Partner	Review the status of the engagements and connect with the client's executives.		At a Proposed Frequency
Operational	Project Manager, Sr. Client Solutions Partner	Ensuring compliance to directives and standards at this level	CTO and IT Technical Manager	Scheduled Interactions at least once a month
Transactional	Leads from the Implementation Areas	Smooth delivery of daily services	Project Manager	High Frequency

XTGlobal's responsibilities also included maintaining parallel process improvement in hiring, retention, and associate satisfaction, and ensuring staffing for the project with appropriate skilled resources.



How the Client Benefited:



Savings

Client was able to continue with the technology they had in place with the purchase of additional technology.



Efficiency

XTGlobal could bring a value proposition to the client to help improve efficiencies of the systems within 3 months.



Accuracy

Improved to 100%



Productivity

The SharePoint support provided by XTGlobal improved the process in terms of efficiency and productivity. The client could cut down the amount of time employees spent in support of the system and workarounds so that they could focus more on bringing back ROI to the business.



Operational Wins

Farm health was upgraded, workflows were put in place, and physical and logical security was higher than client expectations.



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