

Private Holding Company Enterprise Management System

BACKGROUND

A successful holding company with business interests in the US and Mexico called on Spitfire with an interesting challenge. Over the years, the executive management team had developed a management 'system' that helped align all company activities to the corporate vision. This series of forms, reports, meeting charters, organizational design and performance measures are used regularly to achieve target bottom line results. Now, oversight of the large number of entities is becoming a labor intensive task - is there a better way?

CHALLENGE

The 'system' consists of worksheets, forms, email exchange, calendar scheduling, reports (delivered in many formats) and a document repository on a central file server. The client would like to engineer a more automated system that would enable workflow, central calendar management, email integration, collaboration and secure document management. In addition, dashboard capabilities would allow more efficient and timely monitoring of performance metrics. The System would be designed to mimic the design that users are familiar with, while automating many of the manual processes that take so much time.

SOLUTION

The Spitfire Group began the effort by aggregating the 'system' components (forms, reports, documents) and mapping the manual processes using the defined best practices (and exception paths). Armed with the requirements, the Solutions Team set out to identify viable platform alternatives, and prototype selected features as a reality check. Microsoft SharePoint was selected as the system platform - SharePoint standard features would serve as a foundation for the collaboration, workflow and document management requirements identified during the Discovery. In addition, the ability to expose the new system on the Web would be critical in order to meet the client's future growth plans.

CONTINUE...



RESULTS

In just 3 months, the manually intensive management 'system' has been engineered on the SharePoint platform. The management portal consists of a landing page that reveals the familiar methodology that each entity will use to ensure that all staff activities align with the business strategy. In addition, meetings, approvals, documents and forms are all driven from the SharePoint system. Custom form design was accomplished with an external toolset and Microsoft Exchange integration via MOSS 2007 helped collapse the large volume of email between staff members. A custom configuration management tool was developed that made deployment of new instances straightforward.

SUMMARY

- **Automated Business Processes**
- **Extensibility for Growth**
- **System-in-a-Box for new Entities**
- **Secure Document Sharing**
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Get your direct connection to the bottom line, contact:

Business Development
sales@spitfiregroup.com



Business-Driven Technology Solutions

11409 Business Park Cir., Ste 110
Firestone, Colorado 80504

303 485 1880

www.spitfiregroup.com