



Microsoft Customer Solution

Case study

## The Knowledge Flows Freely and Profitably at SMS Management & Technology

“Our consultants have always shared their intellectual capital generously with colleagues and clients, but now we have an impressive technology solution to support this exchange more strategically and sustainably.”

**Tom Stianos**

Chief Executive Officer  
SMS Management & Technology

**W**hen knowledge is your business you need to be accurate, current and comprehensive – a task that becomes imperative if your clients are among Australia’s leading companies. This is why IT services and business consultancy, SMS Management & Technology, realized it was time to update the way information flowed within the company. SMS had outgrown its existing intranet and document repository and it wanted a more powerful system to provide its consultants with the information they need to give clients superior service. With Microsoft Gold Partner, OBS, SMS developed an information portal based on Microsoft® SharePoint® Portal Server 2003. Today, the company is reaping the benefits of improved communication and collaboration, as well as more convenient access to the intellectual capital that helps differentiate SMS from its competition.



CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
SMS Management & Technology is an IT services and business management company with offices in Australia, Singapore and the UK. It offers project management, IT strategy, process re-design and change management. Established in 1986, SMS employs more than 730 people. In 2004 the company generated revenue of \$83 million.	SMS's information and document management needs had outgrown its existing system. The company wanted to improve communication, knowledge sharing and collaboration among staff, while achieving new operational efficiencies.	Working with enterprise portal specialist and Microsoft Gold Partner OBS, SMS established a more flexible, powerful and integrated portal platform named <i>Magellan</i> . This information portal is based on Microsoft's SharePoint Portal Server 2003 and Microsoft SharePoint Team Services.	<ul style="list-style-type: none"> <li>Improved knowledge sharing.</li> <li>Enhanced communication and collaboration.</li> <li>Increased operational efficiency and productivity.</li> <li>More convenient access to information.</li> <li>Enhanced client service from improved use of consultants' intellectual capital.</li> <li>Fewer administrative tasks and reduced costs.</li> </ul>

“Our consultants have readily extended the way they work into our portal environment and *Magellan* enables them to be even more effective at what they do. It has been critical for us as a differentiator.”

**Lynn Warneke**  
Knowledge Manager  
SMS Management & Technology

## Situation

The competitive world of IT and business management consultancy rewards those companies that can deal most effectively in the currency of the industry – knowledge. Gathering valuable information, storing it and delivering it to staff when they need it most is a challenge faced by all business consultancies.

For Australian IT and business management company SMS Management & Technology, meeting such a challenge was pivotal for its future success.

“Knowledge is what clients come to us for,” says SMS CEO Tom Stianos. “When companies engage a single SMS consultant they usually experience the benefit of the collective intellectual capital of our entire consulting base. This is one of the ways we distinguish ourselves from others who simply supply a contractor.”

However, SMS consultants found themselves facing the usual frustrations that arise from having disparate repositories of information – difficulties in locating relevant documents, meeting urgent requests, limitations to email and document access when working remotely, and multiple log-ons for various programs. The company was also dealing with an application environment that had become fragmented over time, some unreliable systems and high maintenance costs.

“Our existing environment was not as efficient as we knew it could be,” says Lynn Warneke, SMS’s Knowledge Manager. “It included a document management system and an intranet for our Australian and international offices, together with enterprise helpdesk, finance, HR and CRM applications.”

Warneke says SMS’s intranet was based on static HTML pages where even minor content updates were time-consuming. The intranet also had a ‘one-size-fits-all’ interface. There was no capability to target

news, events or other important content to various individuals or groups at SMS.

“The company places great value on knowledge sharing between consultants to ensure our clients experience the best possible outcomes to their business initiatives,” says Stianos. “When we reviewed our corporate knowledge management strategy, it was clear that our existing infrastructure and applications would need an overhaul in order to better support our business objectives.”

## Solution

Following thorough analysis of its business requirements, SMS identified Microsoft SharePoint Portal Server 2003 and Microsoft SharePoint Team Services as the solution of choice. The SharePoint suite also offered a good fit with SMS’s existing infrastructure and budget.

Working with portal and collaboration specialists and Microsoft Gold Partner OBS, SMS created *Magellan* – an enterprise information portal that offers staff an online experience personalized to each user’s needs. The homepage provides news and events targeted to each staff member’s base location. Staff can place ‘alerts’ on any topic or search term so they are notified about new material or updates.

*Magellan* replaced SMS’s existing intranet and provided the additional document management capability the company required. Key materials, such as case studies, tools, templates, references and methodologies, are now more effectively maintained and more readily accessible. The portal also serves as an entry point to business-critical systems, such as the corporate Web-based email, online IT helpdesk service and SMS’s CRM system.

An invaluable part of OBS’s involvement was the migration of thousands of existing

documents from SMS's existing document repository.

"The migration strategy was quite complex," says Principal Solution Architect at OBS, Andrew Lawson. "With so much content in SMS's legacy system, we needed to automate the process as much as possible. Preservation of extensive metadata from the old system to the new was also critical."

The project included upgrading both SMS's network operating environment to Microsoft® Windows Server™ 2003, and email groupware environment to Microsoft Exchange 2003. Microsoft Active Directory®, a prerequisite of a Microsoft SharePoint Portal Server 2003 implementation, was also rolled out across the organization.

## Benefits

Embraced by SMS employees in all regional offices, the *Magellan* portal is easy to use, reliable and robust. Document management has improved and employees are more productive. *Magellan's* Team Sites have encouraged collaboration and allowed departments, teams and employees to create secure work areas for their specific needs.

When SMS sought feedback on *Magellan*, soon after its release, the response from staff was overwhelming. Comments included this from one employee: "*Magellan* is fantastic. It's so easy and intuitive to find everything. The structure, usability, look and feel and content are all first class."

And this from another: "As a new SMSer, I have been very impressed with *Magellan*. Quite simply it is the best portal I have seen in a decade of outsourcing."

## Enhanced Communication and Collaboration

Two months after the launch of *Magellan*, 45 team sites had been launched, more than 200 documents have been published to the knowledge base (a significant improvement on pre-portal document capture rates) and 96 per cent of SMS employees have visited the portal more than 20 times. All content managers are contributing regularly and there has been an average of 2,635 page views per day.

The new features have enabled an unprecedented level of communication and online collaboration between SMS groups. With the majority of consultants working at client sites at any one time, *Magellan* has been invaluable for supporting the remote workforce.

The Team Sites provide consultants with online workspaces accessible from *Magellan*. Staff can exchange news and ideas, collaborate on documents, organize meetings or participate in threaded discussions. Team Sites can also be used by consultants to work with peers to solve client problems or develop marketing collateral, tools and white papers to support the company's service offerings.

"Team Sites provide a user-friendly and function-rich mechanism for leveraging our consultants' knowledge, across our regional offices, to design and deliver better client solutions," says Jane Headon SMS Knowledge Coordinator.

"This feature has been a big hit with our staff. It was very pleasing to see so many team sites established within the first couple of weeks of *Magellan's* launch. With the agreement of clients we have even set up Team Sites that are focused on specific client organizations. These sites offer news, information and reference material that may assist consultants engaged on site for that client, or in their preparation for an engagement."

The portal also includes a discussion board, where queries or requests for help can be posted, with threaded responses

"The technology has been a wonderful enabler for our business. It has given us additional ways to leverage what has always been a strong knowledge sharing culture."

**Lynn Warneke**

Knowledge Manager  
SMS Management & Technology

viewable by all. The survey feature of SharePoint allows quick and easy collection of employee feedback on topics of interest. Surveys have been used successfully several times already by SMS staff to facilitate capture and analysis of responses to key issues.

### Improved Operational Efficiency and Productivity

Staff from SMS's regional offices now have the ability to update their own news and events on *Magellan's* homepage and contribute to content in their allocated area of the portal. This distributed content management approach has enabled a more local, relevant and personalized portal experience for users in different branches.

“Our colleagues in regional offices are delighted to have the power to tailor communications and information delivery to their own needs,” says Headon. “With some basic training, and no specialist skills required, they have quickly embraced this new facility.”

Another contributor to the portal's enthusiastic reception is its single sign-on capability – allowing easy, fast access to all corporate information, major applications and Web mail for remote workers. Previously, staff needed four separate logins for their application requirements.

Through easier, more convenient access to documents across the company's offices, SMS consultants can work faster and smarter.

“If consultants have a particular problem to solve or need to prepare a key deliverable for a client, they now have easy access to an extensive knowledge base. They can search existing tools, templates,

frameworks or case studies where their colleagues may have experienced a similar issue before,” says Headon. “It means they don't have to reinvent the wheel. And the client benefits from an already proven approach.”

### Reduced Administrative Tasks and Costs

A popular feature of *Magellan* is the customized *People Finder* – a staff contacts directory that includes photos, areas of expertise and current client engagements. Details are available via a real-time query to SMS's enterprise finance system.

A direct link to each consultant's CV is also available on *My Site*, allowing peers and resource managers to quickly check for relevant skills or experience before contacting a colleague. Being able to quickly identify the company's experts in a range of disciplines, together with information on their location and availability, assists SMS to manage its resources. *People Finder* integrates directly with *My Site*, where individual profile details can be updated directly by the user.

SMS also has a more streamlined process for entering details of new personnel onto the system. Staff information is entered once only into SMS's business systems, with the relevant details being fed automatically into the Microsoft SharePoint Profile database. Alterations such as phone numbers and leave information can be updated directly by the user. This reduces the administrative overheads of maintaining an up-to-date personnel directory.



## Software and Services

### Products

Microsoft® Windows® Server™ 2003  
Microsoft SQL Server™  
Microsoft Exchange Server 2003  
Microsoft Internet Security and  
Acceleration Server 2000  
Microsoft Active Directory®

Microsoft SharePoint® Portal  
Microsoft Windows® SharePoint  
Services  
Microsoft Business Solutions Solomon  
6.0

### Hardware

HP Proliant DL 360 G3 Server running  
the Microsoft SharePoint System.  
HP Proliant DL 360 G3 Server running  
Web mail.  
HP Proliant DL 380 G3 Server running  
Microsoft Exchange 2003.  
HP Proliant ML370 G3 Server running  
Microsoft SQL Server 2000.

### Partners

OBS  
[www.obs.com.au](http://www.obs.com.au)

## Software for the Agile Business

### For More Information

For more information in Australia, call the Microsoft Information Centre on 13 20 58. To access information using the World Wide Web, go to:

[www.microsoft.com/resources/casestudies](http://www.microsoft.com/resources/casestudies)

For more information about SMS Management & Technology services, call (613) 9696-9700 or visit the Web site at: [www.smsmt.com](http://www.smsmt.com)

For more information about OBS services, call (613) 9606-9200 or visit the Web site at: [www.obs.com.au](http://www.obs.com.au)

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