Planet Technology

CASE STUDY: UPSCALE WINERY & RESTAURANT CHAIN

MIGRATING AND STREAMLINING SHAREPOINT INTRANET FOR IMPROVED USER EXPERIENCE
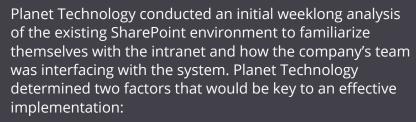
OVERVIEW

The client, a winery and restaurant chain with more than 40 locations nationwide, relied on a SharePoint Online Classic implementation for a variety of internal workflows and business process automations. This intranet was heavily customized and used widely throughout the company for sharing information and documentation among corporate executives, store managers, and restaurant employees. But due to poor design, employees across the organization struggled to interface with the intranet properly.

THE CHALLENGE

Recurring permissions and access issues made it difficult for users to find the information they needed to do their jobs properly, which began causing issues at the store operations level. Furthermore, troubleshooting and making patchwork fixes became a huge burden on the company's IT department. In order to streamline business processes, from the corporate level to individual store locations, the client determined it needed to reconfigure their SharePoint intranet.

TECHNOLOGIES USED

| SHAREPOINT ONLINE CLASSIC | SHAREPOINT ONLINE MODERN | POWERAUTOMATE | SHAREGATE DESKTOP MIGRATION UTILITY |

SOLUTION

Planet Technology conducted an initial weeklong analysis of the existing SharePoint environment to familiarize themselves with the intranet and how the company's team was interfacing with the system. Planet Technology determined two factors that would be key to an effective implementation:

- End-users were using search functionality to navigate the intranet, but the system was not designed with this in mind.
- The intranet files didn't have keywords or metadata, contributing to a difficult end-user experience for employees.

Using these key findings to drive the migration, Planet Technology's Microsoft 365 team began designing a new intranet system in SharePoint Online Modern. Files in the new system were tagged with relevant keywords and metadata, making for a more intuitive user experience, and yielding more accurate search results.

The new SharePoint implementation features a more visual and engaging presentation, improving ease-of-access for all users. Additionally, Planet Technology created visual fields within the new intranet, about 130 in total, so that users can more easily find important documentation through dashboard and graphic displays. This was a massive upgrade from their previous system, which had no visual elements, only a folder structure.

Planet Technology conducted remote trainings, and taught content owners how to use metadata and keywords to maintain a quality user experience going forward. By catering to the preferred manner of use by employees—particularly search functionality—minimal training was required.

The engagement was completed over the course of six months, from initial analysis to governance strategy and final implementation.

RESULTS

TAILOR-MADE INTRANET

The company's intranet has been custom-tailored to users' needs

THE IT TEAM IS FINALLY FREE

No longer overburdened by fixes to a business-critical system

STREAMLINED COMPANY-WIDE COMMUNICATION

Executives, store managers, and staff share information with ease

TURNKEY EMPLOYEE ENGAGEMENT

Restaurant workers respond to surveys and other prompts for corporate feedback

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