

Client

A Big Four Auditor and a leading professional services firm offering audit, tax and advisory services to businesses globally

Goal

Make marketing service fulfillment faster and more efficient on a global scale

Business Impact

Application access increased to over 2000 users within 60 days of launch.

Application task completion reduced from minutes to seconds.

On-boarding new users accomplished in minutes.

Application usage expanded to several groups in the company.

Expedited Service Fulfillment

Iris created a SharePoint portal for a top audit, tax and advisory firm to drive up market development.

Overview

Iris built a modern service fulfillment portal to help our client manage its service marketing activities more effectively thus enabling the success of their growth strategy.

The site helps optimize resource allocation, productivity and efficiency in supporting the pipeline of pursuit-related activities and dynamically connects the firm’s field end-user and practice professionals to the shared services distribution channels. It is used by hundreds of users across the globe to request for marketing assistance and fulfill them through the delivery of proposals, prospect-specific collateral, contact and list management, pursuit support and market analytics and client care research.

The challenge

Our client is one of the largest professional services organizations providing assurance, tax advisory, actuarial, audit, management consulting and related services to organizations around the world. From hundreds of offices spread out globally, our client’s professionals support the company’s business and drive up demand for services. These individuals need up-to-date research and marketing assistance from its cadre of service support personnel located in any of its offices.

Our client’s legacy system was designed to work with the in-built features of MOSS 2007. As the business grew, it became clear that the erstwhile application’s design ran into several technical issues and brought in severe limitations in scaling to current requirements and handling current data volumes. This directly impacted service delivery and it became imperative that a new application be designed and put in production.

The solution

Iris designed an application that leveraged SharePoint capabilities and augmented it with custom .Net components and third-party controls to provide a much higher level of user experience. Iris introduced advanced workflow, search and analytics capabilities that delivered the levels of flexibility and scalability that our client needed.

Iris introduced a number of innovative design features to ensure that the new application was scalable and reduced dependency on I.T. technical assistance for operational needs. Some of the design features were:

- Implement and enforce standards that ensure a response time of five seconds or less
- Designed a claims-based authentication model for granular security
- Redesigned the user interface to improve user experience
- Moved data away from in-built features of the legacy application such as data in drop-down list and items on forms to a SQL Server database thus improving flexibility in data definition and workflow design
- Optimized data and retrieval methods.

Tools & technologies

Microsoft SharePoint 2010, ASP.Net 4.0, SQL Server 2008 R2, SSRS, Sync Framework Runtime v1.0, Chart Controls for .NET Framework 3.5, PowerShell v2 RTM, Telerik Grid

Technical highlights

- Multi-level security – Item, Menu, Field Form level for advanced work management capability
- User configurable labels and captions
- Customizable and user-defined public and private views
- Customizable form elements – New fields and forms can be added or removed
- Integrated SQL Server Reporting - SSRS reports are hosted within SharePoint.
- Email alerts
- Bulk edit of fields
- Audit trail
- Data migration utilities – Internal MOSS 2007 data sets to SQL Server

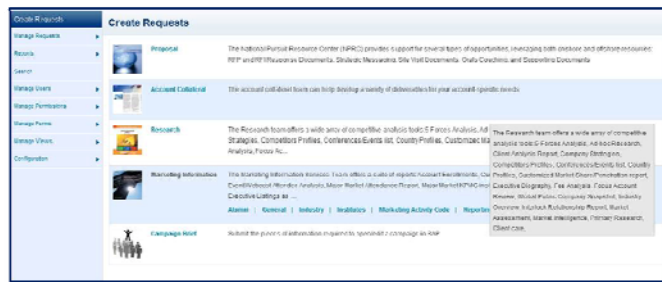
The Iris advantage

Vision to Reality: Iris personnel took on the turnkey responsibility for the application from concept to launch. Iris managed the entire lifecycle from discussing/documenting requirements to performing data migration to the new environment, testing for integrity and assisting our client's production personnel to rolling out the application for firm wide use.

Speed to market: A complex application was completed from requirements to production in nine months.

Execution excellence: Iris teams understood the multi-environment testing and validation of applications in the client environment and worked closely with several groups of the client to guide the application from the technical review environment to the production servers.

Collaborative problem solving: Iris worked extensively with the client's marketing and technical teams to define the user interface and work through the implementation detail of many of the new features.



ID	Attachment Date	Due Date	Project Title	WPR Account	Project Type	Industry	Function/Service	Assigned To	Is Online User	Submitter Date	Requested By
4770			Kulbeka Branding - 2012		None	NI	Other			Unassigned	Hidden user
4771		1/28/2012	SHOUBA COMPANY - new 1/28/2012		Contract	Chemical	SEARCH - RFP	Account - User		Unassigned	Unassigned
4772		1/14/2012	THE VICE COMPANY - 1/14/2012		None	Finance	SEARCH - RFP	Account - User		Unassigned	Unassigned
4773		12/10/2011	HOLLYWOOD for Hollywood.com		Other	Media	SEARCH - RFP	Account - User		Unassigned	Unassigned
4774		3/28/2012	Q&A Account - Q&A.com		None	Other	SEARCH - RFP	Account - User		Unassigned	Unassigned
4775		01/04/2012	WPR - Broker		None	Other	SEARCH - RFP	Account - User		Unassigned	Unassigned

Name	Type	Status
Account Customization	View	OK
Account Customization - Paid/Free	View	OK
All Recent Requests	View	OK
All New Today	View	OK
All Requests	View	OK
All Requests - Complete	View	OK
All RFP's - Field To - Responses	View	OK

About Iris

Iris (www.irissoftware.com) is a professional software services organization providing its customers with high-quality, cost-effective solutions and developing mutually beneficial relationships. Iris does this through comprehensive solution offerings with best-of-breed technologies, rapidly deployable solutions, flexible engagement models and proven methodologies. This allows customers to focus on their core competencies, and concentrate IT resources on projects that directly impact their bottom-line.