

Getting More Value from Cloud Migration and Automation

Algood Food Company is recognized throughout the United States as one of the premier packers of private label peanut butter, jellies, and preserves. Customers include large retail chains, wholesalers, and major cooperatives, so chances are if you are a PB&J fan, you have tasted their products.

Algood's strategic plan has always revolved around customer-driven objectives, including product quality, customer service and innovation in packaging. The drive for innovation and process improvement runs throughout the organization, leading to the selection and implementation of Microsoft Dynamics 365 and the commitment to modernize their backend operations and move to the cloud.

In early 2021, Raye McGlawn, Manager of Information Systems, began a search for a Microsoft Partner specializing in modern SharePoint and automation solutions. After a few discovery sessions to assess the current environment and workflow, Algood and Compass365 agreed on a scope and not-to-exceed estimate. Raye McGlawn chose the Compass365 division of General Networks as Algood's partner, based on their migration expertise and history of successfully migrating SharePoint on-premises into SharePoint Online.

This case study focuses on the work between Compass365 and Algood to move from a legacy SharePoint 2010 environment and associated workflows to SharePoint Online with a Power Platform solution that integrates with Dynamics 365.

THE CHALLENGE

Algood was leveraging a SharePoint 2010 intranet and workflow hosted on-premises. With outdated hardware and SharePoint 2010's looming end of life, Algood wanted a qualified migration expert to execute the migration and rebuild/reintegrate a critical workflow with Dynamics 365.

SUCCESS METRICS

1. Content migrated from SharePoint 2010 to SharePoint Online to improve availability
2. SharePoint Designer approval workflow rebuilt using Power Automate
3. Time saved and duplicate manual entries eliminated with a business process re-engineered to begin in Dynamics365

INDUSTRY

Food and Beverage Manufacturing

PLATFORMS AND SOLUTIONS

- SharePoint Online
- Power Automate
- Dynamics 365
- ShareGate Migration Tool

"I liked Compass365's approach. They were great about explaining the steps. They walked me through and made sure my team and I knew we could manage our new environments."

Raye McGlawn, Manager Information Systems,
Algood Food Company

ABOUT COMPASS365

Compass365, a Microsoft Gold Partner, combines our years of SharePoint and Microsoft 365 expertise with proven methods to improve the way companies work, operate, and confidently get the value from their Microsoft investments.

Another challenge was to ensure all teams that had been leveraging the old intranet would be able to easily manage and learn the new environment without lowering productivity.

THE INVESTIGATION

A first step in all Compass365 migration projects is to assess the current environment (site structure, content, and any complexities such as add-on's, customizations, forms, and workflow solutions) to prepare a migration plan. Evelyn Runnals, Senior SharePoint Architect and Migrations Specialist at Compass365, analyzed and reorganized Algood's content to be archived in a separate site for historical purposes. All active content was then mapped to the new site structure in SharePoint Online.

When Jonathon Fung, Senior Architect specializing in forms, workflow, and business process automations at Compass365, discussed the current workflow with the business users, it became clear that the requirements should be changed to facilitate the way the business works today. The SharePoint Designer workflow, a critical business component, was used to automate an approval process to be used for all changes to the formula, label, or any other key change to an Algood product.

Originally, the approval workflow kicked off from SharePoint list, but Compass365 learned that the fields in the SharePoint list were not being used (only comments were being recorded). To improve efficiency and eliminate duplicate entries, the process was redesigned to start in Dynamics 365, which was already being leveraged by Algood's sales department.

THE SOLUTION

Upon a successful roll-out of Dynamics 365, attention needed to turn to migrating a legacy SharePoint 2010 environment that had grown unruly overtime, difficult to navigate and overdue for modernization.

Algood's SharePoint 2010 content was successfully migrated into SharePoint Online, with separate sites for archived and active content. The SharePoint Designer workflow was reimagined and rebuilt using Power Automate workflows, and proper fields were added to kick off the workflow in Dynamics 365. This same Power Automate workflow that originates in Dynamics 365 leverages SharePoint lists to complete the approval process.

The timeline was roughly 32 weeks, incorporating work with Algood's Dynamics team over the 2021 holiday season. Raye McGlawn and Algood were extremely happy with the work provided by Evelyn Runnals and the Compass365 team.

The flexibility to restructure content into archive files when appropriate and to work with the business and Dynamics teams to reimagine the workflow were appreciated and resulted in a more streamlined solution that will save the company time and money for their back office.

"The workflow itself has been much more streamlined and we now have a cleaner look. We've also empowered users to do more with each of their SharePoint sites with guidance from Compass365."

Raye McGlawn, Manager Information Systems,
Algood Food Company

INNOVATIONS AND IDEAS THROUGH WORKING TOGETHER

Algood's staff is now fully working in SharePoint Online, integrated with Dynamics 365 with a more accessible, modern process. Algood and Compass365 are working on Phase 2 of the effort, which involves continued improvements to the current Power Automate workflow and taking full advantage of the modern features of SharePoint Online.