

Modernizing Collaboration and Communications in Financial Services with SharePoint 2019

Founded in Long Beach in 1907 by C.J. Walker, Farmers & Merchants Bank (F&M Bank) has 26 branches across Southern California. F&M Bank has grown slowly and safely since 1907, earning its reputation as “California’s Strongest.” With deep ties to the community, F&M Bank has developed a culture of trust and friendship with clients, partners, and employees alike.

In 2021, F&M Bank began a search for a Microsoft SharePoint Services Provider to facilitate the upgrade and modernization of their SharePoint 2010 sites into SharePoint 2019 with an emphasis not only on technical expertise, but also on working with their 40+ departments to ensure that SharePoint 2019 met the business’ needs and expectations. Compass365 was selected to partner with F&M Bank to ensure the effort was a success.

THE CHALLENGE

F&M Bank recognized the need to replace their end-of-life SharePoint 2010 system with a fully supported SharePoint 2019 system. SharePoint is used within F&M Bank as their company intranet and also for department document collaboration. A primary goal of the project was to design SharePoint 2019 sites to host a modern and engaging intranet, facilitate internal communications and collaboration, have consistent visual and governance standards throughout, and to migrate the SharePoint 2010 content into SharePoint 2019 in a thoughtful manner. In keeping with F&M Bank’s commitment to their employees, of key importance was to work with each department to analyze their content and collaboration needs, work through the appropriate design and structure, and to deliver a site tailored to their business needs. While moving off of SharePoint 2010 was a driver for the project, the team at F&M Bank emphasized the goal of delivering a highly useful and engaging experience for their employees. F&M Bank reached out to suitable Microsoft Partners via an RFP process.

SUCCESS METRICS

- Replace SharePoint 2010 with SharePoint 2019
- Design an engaging intranet to facilitate communications and collaboration
- Establish templates, navigation, and governance standards for an improved user experience
- Work with each department to analyze, curate, and migrate content into collaboration sites
- Optimize SharePoint Search, enable Online Office Server, and apply permissions through AD

INDUSTRY

Financial Services

PLATFORMS AND SOLUTIONS

- SharePoint 2019

“Compass365 provided the depth of knowledge we were lacking. They did a bunch of training for us and answered every single question. Our employees like to feel like you’re here sitting with them at their desk and Compass365 delivered on that.”

PMO, Farmers & Merchants Bank

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.

THE INVESTIGATION

The team at Compass365 was selected to partner with F&M Bank on this highly visible effort because of our business user friendly approach to SharePoint migrations, upgrades, and implementations. Over the past 15 years, we've developed a migration methodology and approach that maximizes user adoption and satisfaction and includes the stakeholders' input throughout the process.

F&M Bank and Compass365 engaged via several online meetings to review requirements, discuss approach, and provide a reasonable estimate of scope, effort, and timeline. It was agreed upon that a high level of assessment and analysis with the business users was necessary to meet F&M Bank's requirements.

Working with F&M Bank's Program Management Organization (PMO) and after assessment and design meetings with F&M Bank's 42 departments, the decision was made to build the intranet site and the department collaboration sites for each group. The organization requires an on-premises footprint and SharePoint 2019 was used to build out the sites using a modern approach and features. In the cases where SharePoint 2019 did not offer the modern experience desired out of the box, the team at Compass365 built custom webparts to accomplish the goal. Education was also needed for users to review their content in the context of what goes where to support the new department collaboration site structure.

THE SOLUTION

The teams at Compass365 and F&M Bank worked to facilitate the build out of the SharePoint 2019 intranet and collaboration sites and the migration of curated content for each department. A set of standardized templates were created to provide some flexibility in the page design, while ensuring overall site consistency. All F&M Bank business

users are now active in the new system and SharePoint 2010 has been retired.

F&M Bank has an engaging intranet and collaboration spaces that are being heavily used with positive feedback. The F&M Bank Marketing Department is keeping the intranet site fresh with interesting content, news, and events to engage and inform their distributed workforce. The collaboration sites are populated with relevant documents and content and are meeting the goal of facilitating collaboration throughout the organization.

COMMITTED TO PROVIDING VALUE

A key component of Compass365's methodology is to listen closely to their clients and develop solutions that meet all their business needs and provide true value to the organization. This focus on communication and cooperation helped the teams at Compass365 and F&M Bank develop a mutually beneficial partnership based on trust and collaboration.

Highly satisfied with the outcome of this project, F&M Bank and Compass365 are in the process of migrating a specialized site and are in discussions for building an organization wide site for policies, procedures, and forms. There is also continued communication around modernization, whether in SharePoint 2019 or Microsoft 365.

"Our old intranet was out of date and required a major effort and deep SharePoint expertise to upgrade it. We needed to find the right partner to help with that. Compass365's expertise, support, and communication really stood out for us, and we are excited to continue working with them."

PMO, Farmers & Merchants Bank

F&M Bank is a Member FDIC

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