

Streamlining Collaboration and Enhancing Efficiency with SharePoint and Power Platform

Corporate Finance Associates Worldwide (CFAW) is an investment banking firm that has been serving middle-market companies since 1956. In their 65 plus years they have expanded their reach across North America, Europe, and Asia, establishing a network of over 35 offices.

As a global firm with offices across time zones their intranet is the lifeblood of their business. Serving as a corporate portal for all content and featuring a deal system for completed transactions and active opportunities, the intranet drives collaboration across locations. CFAW's existing intranet was custom-built in 2003 and while still functional, it lacked modern features and functionality. It was time for an update.

After a year-long redesign of CFAW's public website, their team knew finding the right vendor to work with on a new corporate intranet was imperative. Compass365 and two other companies became part of the RFP process and were asked to bid on the project. Executive Director at CFAW, Kim Levin led the process and after the first meeting with Compass365 she knew they were the right company for the job.

THE CHALLENGE

The CFAW team was having difficulty with the ongoing maintenance of their existing custom-built intranet. Updating and adding files or folders to the intranet required a third-party which did not match the hands-on culture at CFAW and required additional cost. In addition, their sales teams had stopped updating their deal system due to the poor user experience and difficulties encountered when attaching tombstones to closed deals.

In keeping with CFAW's self-service attitude and to facilitate collaboration, the task was to modernize their intranet's look and feel, bring the uploading and

SUCCESS METRICS

- Modernized the look and feel of intranet and deal management system.
- Intranet content is easier and faster to create or update.
- Created a centralized source of deal information and related assets.
- New business processes increase adoption and efficiency of deal management system.

INDUSTRY

Financial Services

PLATFORMS AND SOLUTIONS

- SharePoint Online
- Power Apps
- Power Automate

"After meeting with Compass365, it was clear immediately they were exactly what we were looking for, I just knew."

Kim Levin, Executive Director, CFAW

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.

updating of content in-house, and make the deal system easier to update and leverage for closing deals. CFAW also needed this project to be swift, remain on budget, and keep ongoing costs to a minimum.

THE INVESTIGATION

During the discovery process with Compass365, it was found that the engagement would be two different projects happening simultaneously. The first project would be to replace their existing intranet with a modern and engaging intranet. The second project would be to create a new deal system and migrate deal information dating back to 1997 into the new system.

Steve Hong, Intranets Account Manager, Compass365, confirmed the intranet needs could be met by Microsoft SharePoint Online and recommended Compass365's SharePoint Intranet Quick Start package, which offers a teach-you-how-to-fish model and would meet CFAW's budget and timeline.

Qais Gharib, Business Applications Practice Manager, Compass365, was brought in to lead the deal system project. Compass365 found that CFAW needed an easier way to enter a deal and shared how CFAW could leverage the Power Platform to save time and reconnect the intranet and deal system where the company had seen the trail off of usage from their sales team.

THE SOLUTION

Working closely with CFAW the new intranet was designed on SharePoint Online. The redesigned intranet, named HUB, capitalizes on SharePoint's modern look and rich feature set to enhance the user experience with easy access to all their collateral, documents, research, and tools. The addition of news, announcements, events, and time zones to the homepage facilitates

engagement and collaboration across their global offices. Pages were built for CFAW's nineteen industry practice groups that surface tagged tombstones, documents, reports, and licensed images to provide a one-stop-shop for their sales teams to expedite pitch creation. The framework was developed to be future-proof and Compass365 trained CFAW on how to update and add content to HUB.

SharePoint was used to house the deal system and transactions were entered into a SharePoint list through a Power App that cut down significantly on the fields required to enter a transaction and allowed the sales team to attach a tombstone to closed deals. Power Automate workflows were then created to add submitted tombstones to HUB. Once the new system was built and reviewed the Compass365 team migrated thousands of completed transactions into the new database.

COMMITTED TO PROVIDING VALUE

Compass365 kept CFAW's most pressing needs at the forefront. The flexibility of Compass365's SharePoint Intranet Quick Start ensured the project come in on budget and gave CFAW a solution they could manage themselves. By taking the time to truly understand CFAW's requirements and intelligently using out-of-the-box tools Compass365 was able to deliver a scalable SharePoint intranet and deal system in under four months.

"The Compass365 team really knew their stuff. They totally understood what we were attempting to do, and that made it really easy to work with them. We really love the new system."

Kim Levin, Executive Director, CFAW