

Financial Services

C O N S U L T I N G



CASE STUDY

THE BIG PICTURE

The documentation required to support growing financial services organizations is immense. Regulations and global coordination require constant communication among all team members. A vital component of any scalable business plan is a reliable document repository.

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so much information, so little time

SharePoint Document Repository

Problem

A brokerage firm with offices located in major financial centers around the world had a need to get their documentation under control. Different areas of the IT department were storing documentation in a variety of folders across the local and wide area networks -- making IT documents increasingly hard to find. Adding to the problem were multiple copies of some documents strewn across the network. Knowing which copy of any given document was the most recent was becoming a challenge.

Analysis

Gaining control of their documentation was clearly becoming a productivity issue. Having extensive documentation readily available regarding their policies, systems and processes was essential for audit compliance, risk mitigation and efficient daily operation.

Solution

An observant PSC consultant noticed this trend and suggested that the client consider Microsoft SharePoint Portal Server to help organize and gain control over their documentation. PSC helped the client leverage SharePoint's integrated portfolio of collaboration and communication services to connect people, information, processes, and systems both within and beyond the organizational firewall. SharePoint also offered search, document versioning and check in/check out services to directly address pressing document management issues. SharePoint portal sites were created for each of the departments to access the documents, diagrams and other files that were vital to auditing and many other daily business functions. Better organization and search services allowed the client staff to find the documents they needed in a more efficient and scalable manner.

It's all in the way we listen.™