Resultant

Flaherty & Collins Properties
Undergoing a Successful Document Management Implementation

Effective document management solutions all have one thing in common: they work for the people who interact with the documents every day. By understanding the frustrations and needs of these end users, an effective solution can be built. This was the case for Flaherty & Collins Properties (F&C).

THE SITUATION

When F&C recognized inefficiency caused by its current document management processes, it turned to its technology partner, Resultant, to conduct a strategic assessment and provide a solution recommendation.

THE RESULTANT APPROACH: PARTNERSHIP

After conducting a rigorous software selection process to holistically understand end user needs, Box was determined to be the best suited technology for F&C's workforce—many of whom are remote.

The Solution:

- Includes modern cloud applications and tools

- Is optimized for mobile workers

- Expands the use of existing applications

- Introduces an important new enterprise document management technology tool to the organization, Box

With Box's strong integration with Office 365, a solution F&C already had in place, the technology was the perfect fit for supporting a productive environment.

Working alongside F&C's executive project lead, the Resultant team assembled a pilot group to assist in the next phase of the project: solution design and planning. The group consisted of an employee from every department and at all levels within the organization to be the voice of its team and assist in designing a solution that would effectively serve every user in the organization.

During the solution design and planning phase, the pilot group met with Resultant weekly to define clear technical and functional requirements. Each week, the pilot group was given a clear set of tasks. Pilot team members were responsible for working with their respective teams or departments to determine needs related to the tasks. As champions for their teams, the pilot group participated in facilitated discussions to define user groups and technical and functional requirements for the solution.

Before going live, the Resultant team worked with employees to pilot the solution. The goal was to ensure every user in the organization felt comfortable with the solution and could easily interact with it for his or her daily responsibilities. This approach created positive energy and excitement across the team as they experienced the benefits in their daily work.

To equip the organization for the transition, the Resultant team developed a comprehensive change management plan. Led by the F&C pilot group, the plan encompassed a series of customized training videos, email communication detailing "the why" and what the new solution would mean for F&C, Q&A discussions with the pilot and Resultant teams, and more—all tailored specifically to the F&C team.

Ready for implementation, the team took a phased approach to the data migration and engaged users along the way—allowing the entire F&C team to move some of its own documents into the new solution to establish ownership and familiarity with the technology.

Effective Implementation Created:

- Increased Efficiency

- Increased Effectiveness

- Increased Employee Satisfaction

- Reduced Business Risk

Change Management Support:

- Train-the-trainer Training Approach

- Training Videos

- Email Campaign

- Q&A Discussions with Pilot Group and Resultant

THE OUTCOME

The pilot group played a critical role in the success of F&C's document management solution design, implementation, and adoption. The team understood the product and solution well enough to support other employees as they adopted the new solution – creating buy-in for the organizationally owned solution. Through a train-the-trainer approach, the pilot team led the way for F&C not only during rollout but in the days that followed as they supported the entire F&C team in the successful adoption.

The approach standardized F&C's core set of technologies, reduced its overall technology footprint, and retired its on-premises technologies.

The solution has minimized and, in some instances, eliminated the business risk associated with its previous document management solution. The new solution is flexible, allowing F&C to change and grow over time, in addition to enabling mobile worker optimization, speed, ease and reliability of access, central solution administration, security, and third-party partner compatibility.

ABOUT RESULTANT

Our team believes solutions are more valuable, transformative, and meaningful when reached together. Through outcomes built on solutions rooted in data analytics, technology, and management consulting, Resultant serves as a true partner by solving problems with our clients, rather than for them.

Our expert-led team can take your business to the next level.

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