

Customer Case Study

Masthead Distribution Systems

Industry: Financial Services

Location: Cape Town

Technology Deployed:

- Microsoft Sharepoint Server 2007
- Microsoft SQL Server
- Microsoft Windows Server
- Microsoft .Net 3.5
- Microsoft SQL Server Reporting Services

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Deidre Vorster, Masthead MIS Manager

Client Overview

Masthead Distribution Services was established in 2004 as a support network for independent financial brokers. While one of the company's initial concerns was compliance with the then newly instituted FAIS Act and FICA, the long-term goal of Masthead is to help its members to stay in business profitably. Masthead has accordingly developed a range of value-add services that help members to grow and improve their practices.

Masthead represents some 3 000 members across South Africa. The organisation employs a staff of around 200 people across seven offices country-wide, who support the member network in areas of practice management, compliance, and training, etc.

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Executive Summary

Airborne was appointed Masthead's infrastructure partner in June 2008, with the full management of the Masthead infrastructure environment outsourced to Airborne. Third-party service providers were identified to provide ancillary services and these are managed by Airborne under defined service level agreements.

With this revitalised infrastructure in place, Masthead needed a solution to address the following business issues:

- Communication and collaboration across its 7 offices and 200+ staff.
- Communication of marketing/product collateral to its 3 000+ membership base.
- A refreshed public Web site which reflected the change in business focus, and which would complement the solutions required for internal (staff) and external (member brokers) stakeholders.

Airborne was selected to address these needs through the creation of three Web sites – an intranet site (staff), an extranet site (broker members), and a public site.

Airborne's solution

Microsoft's Office SharePoint Server was chosen as the software solution to address the business needs of Masthead.

Because there would be information overlap between internal and external stakeholders and public information, a single SharePoint Farm was installed and configured, with three separate Web applications to address the three different audiences.

The project was split into three phases to ensure a smooth transition and introduce as little change as possible into the business at any given time.

Phase one

The first phase of the project was the installation and configuration of an intranet on SharePoint. This involved the implementation of SharePoint as well as content management consulting to ensure that the intranet, once launched, had information on it - a critical success factor that Airborne have identified for corporate intranets. The solution was designed, configured and ready for release after just five weeks.

The intranet was a critical choice for the first Web application build, as this would serve as the starting point for all content that will eventually be displayed in the corporate extranet and Internet Web sites. This is also the most heavily utilised site of the three, as all 200 staff store their critical business documentation on here on a daily basis.

Phase two

The second phase of the project was building an extranet. A separate Web application was implemented on the existing SharePoint instance and forms-based authentication was used to allow Masthead's 3 000+ broker community access to pertinent information. Previously this information was cut to over 3 000 DVDs and disseminated country-wide at a high cost to Masthead.

Custom solutions are regularly built on the extranet within a short space of time, using the standard functionality, to facilitate events that Masthead hosts every year, and members use it to RSVP, book and communicate with Masthead staff.

Masthead has also commissioned many custom-developed Web solutions through the years built on a variety of platforms, from Classic ASP to .NET. These are all hosted externally from the Web application, but shelled through the SharePoint site to create a seamless look and feel.

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Deidre Vorster, Masthead MIS Manager

Phase three

The final phase of the project was the implementation of Masthead's Web site onto the SharePoint platform. The shared information across the three Web applications allowed Masthead a lower cost of ownership, as the on-going content management changes needed could easily be facilitated by Masthead staff, with no third-party costs needed to make changes to the Web site, or any of the other Web applications hosted on SharePoint.

Enhanced communication

The implementation of SharePoint as Masthead's communication and collaboration solution has enhanced the business's ability to effectively communicate with its stakeholders via the Internet on a real time basis, and provides a distinct competitive advantage.

The successful and speedy turnaround of all three phases of the solution is directly attributable to a few important factors:

- The SharePoint solution was applied using “out of the box” functionality, keeping customisation to a minimum.
- There was close collaboration with the external marketing organization that ensured the SharePoint design parameters were adhered to.
- There was significant buy-in and support from the Masthead marketing division and executive management. Marketing were intimately involved in the project scoping phase and actively promoted the solutions during the development phase.

Satisfied Customer

The benefits to Masthead are that both direct and indirect costs have reduced due to efficiencies introduced into its business communications, as well as the fact that expensive direct communication media are no longer needed.

Says Masthead MIS Manager, Deidre Vorster: “Airborne is a highly professional, solution-oriented company. They are forward-thinking and have become an integral part of our future planning strategy when reviewing our business IT and infrastructure needs.

“If and where we have run into differences of opinion, Airborne has always been very forthcoming in addressing matters right away and finding quick and workable solutions, which our business highly values in a working relationship.”

Looking Ahead

Masthead aims to strengthen its position as the leading broker service organisation in Africa by continuing to provide a better and more dynamic service to the broker community, and the SharePoint framework is a core component of this strategy throughout the business.

Future plans include a unique policy application on the extranet to assist brokers in selecting the correct product provide, and individual broker Web sites on the Masthead domain.

For More Information:

Airborne Consulting

info@airborneconsulting.co.za

Postal Address

PO Box 50928
V & A Waterfront
8002

Physical Address

1st Floor Block B
Granger Bay Court
Beach Road
V&A Waterfront
Cape Town
South Africa

Phone

+27 (0)21 425 3430

Fax

+27 (0)21 425 1803

www.airborneconsulting.co.za

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