THE TAX INSTITUTE
THE MARK OF EXPERTISE

At a glance

Organisation
The Tax Institute

Industry
Financial Services

Location
Head Office, Sydney

Solution
Microsoft SharePoint

Business Objective

The tax institute were looking for a way to overcome incumbent technology in order to provide more streamlined collaboration, communication and productivity across dispersed offices, departments and employees.

Business Benefits

- Increased visibility of communication between staff and offices through social integration
- Simplified and centralised management document management system with version control
- Secure and remote access for staff to documents, policies and procedures
- Improved collaboration on projects and documents across all departments

SharePoint Brings Order to Document Management at The Tax Institute

The Tax Institute is Australia's leading professional association for tax professionals.

It provides 11,000 members news and publications, professional development, networking opportunities and events, to ensure they are equipped with everything they need to demonstrate the highest level of expertise and increase the advancement of public knowledge of tax in Australia. Headquartered in Sydney, the Institute maintains offices in Melbourne, Brisbane, Adelaide and Perth.

The need for an IT strategy

Eighteen months ago, when Kerryn Divall took on the role of General Manager, Finance, IT and Administration at the Institute, one of her first priorities was to develop a three year IT strategy for the organisation. Since 2009 the Institute had grown dramatically, increasing its range of products and the overall value proposition for members. Staff numbers had also increased, but the technology they relied on was sadly outdated.

"Because of the focus on growth, there had been no significant IT improvements or upgrades in eight years," Divall explains. "The infrastructure was no longer adequate and our document management was simply an S drive with many folders that everyone had access to." This was causing difficulties when trying to locate documents and often resulted in people working on multiple versions of the one document or replicating existing documents.

Priorities

It was clear among the first IT priorities, the Institute required a new document management system that could usher in version control measures, and an intranet facility. Together, these would provide the strong foundation upon which upgraded and new applications could later be added.

In October 2013, Divall approached Professional Advantage to discuss a SharePoint solution. "I already had a long-standing relationship with Professional Advantage, having worked with their consultants in the past," she notes. "Through that experience I also realised that SharePoint would meet all our needs."

Breaking down barriers

Divall admits designing a new intranet and document management system was challenging. "As a newcomer to the organisation, you may have a view about what needs to be done, but then you have to remember there are many people already here who have worked very hard for many years on these problems. You have to tread a fine line as you introduce change."

Among the main issues were the cultural and process shifts required to introduce a collaborative tool within such a siloed organisation. "Up to this time, we'd had nothing in place to enable teams to have conversations and the people within those teams saw no need to work together. We had to find a way to break down the barriers," she says.

In conjunction with Professional Advantage, a series of preliminary scoping workshops were held, bringing together key local and interstate stakeholders.

"The first sessions took a week," Divall explains. "We invested quite a bit of time at this stage. Then, as the idea grew and we got final budget approval, Professional Advantage came back and conducted another needs analysis and configuration analysis. This really helped us to become more specific about what we wanted and to decide how we would go about putting it in place."

"Professional Advantage's real strengths were in helping us define our needs and then managing all the technical aspects to get us there."

The objectives

Professional Advantage designed and developed an intranet that has simplified and centralised the management of all documents commonly referred to, including organisation charts, policies and procedures. To avoid version control issues caused by employees emailing documents to their home computers for work outside of business hours or whilst travelling, remote access has been introduced for the first time.

To boost internal communication, encourage collaboration and foster closer relationships between different teams and branches, a social element was also introduced. "We use the landing page of the intranet to get out information to everyone in an easy and coordinated way. So whenever anyone turns on their computer in the morning, they are presented with news that is relevant to the organisation." To encourage user adoption and increase engagement, the Institute invested time and effort in designing a custom look for the intranet, one that was separate to the well-known Tax Institute branding. "We spent time designing an intranet that was different to our Tax Institute branding, asked staff to suggest names for our portal and organised a launch party to ensure this project would be a success with users".

Divall says throughout the five months of development, the project team's mantra was "Enough to excite, not too much to overwhelm". "Because we are an organisation that hadn't experienced a lot of technology improvement, we were really conscious of the need to bring people with us," she says.

Experiencing the benefits

Although there was some initial hesitation from users, today employees at The Tax Institute are more confident about the new technology and they are learning the benefits of sharing documents and communications within and between teams. The project is experiencing top-down support with benefits being felt across the organisation.

Divall says a good example of this has been the 2015 budget process. "Previously I would create Excel templates which were sent to all budget holders. They would update them, send them back to me and I would have to bring it all together. With 20 cost centres to deal with, it was an absolute nightmare. This year we put the template on SharePoint and shared the central template with each manager."

The change in process saved Divall's team almost four days of collation effort, ensured greater accuracy of data and removed hours of administrative time when preparing the documents for the next board meeting.

The social aspect of the platform has proven a definite hit and is already helping to generate a greater feeling of inclusiveness, enhanced employee engagement and more streamlined operations.

Staff regularly engage in knowledge forums, social feeds and internal blogs. This is enabling the organisation's multiple divisions and offices to work more closely together as they share knowledge and provide support for projects. With the portal visits incrementally increasing each week since launch, the Institute is seeing and feeling the benefits of an enterprise wide collaborative portal.

An expanding horizon

With so many documents to create and disseminate, Divall believes SharePoint still holds a great deal more potential for the Institute. She'd like to encourage employees to begin adding skills and interests to their profiles. "This will help people to find out more about each other and to have conversations that they possibly wouldn't have had in the past," she notes.

Within the next few months, there are plans to open up areas of the intranet to the hundreds of member volunteers who sit on various Institute committees, contributing to the development of new services and programs. Divall points to the example of a committee preparing course content. "It's a massive piece of work that requires many people to collaborate."

She's also considering whether, longer term, there may be opportunities to use SharePoint to disseminate information to Institute students.

"We are always changing and growing. As far as our use of SharePoint goes, I feel like it is very early days"
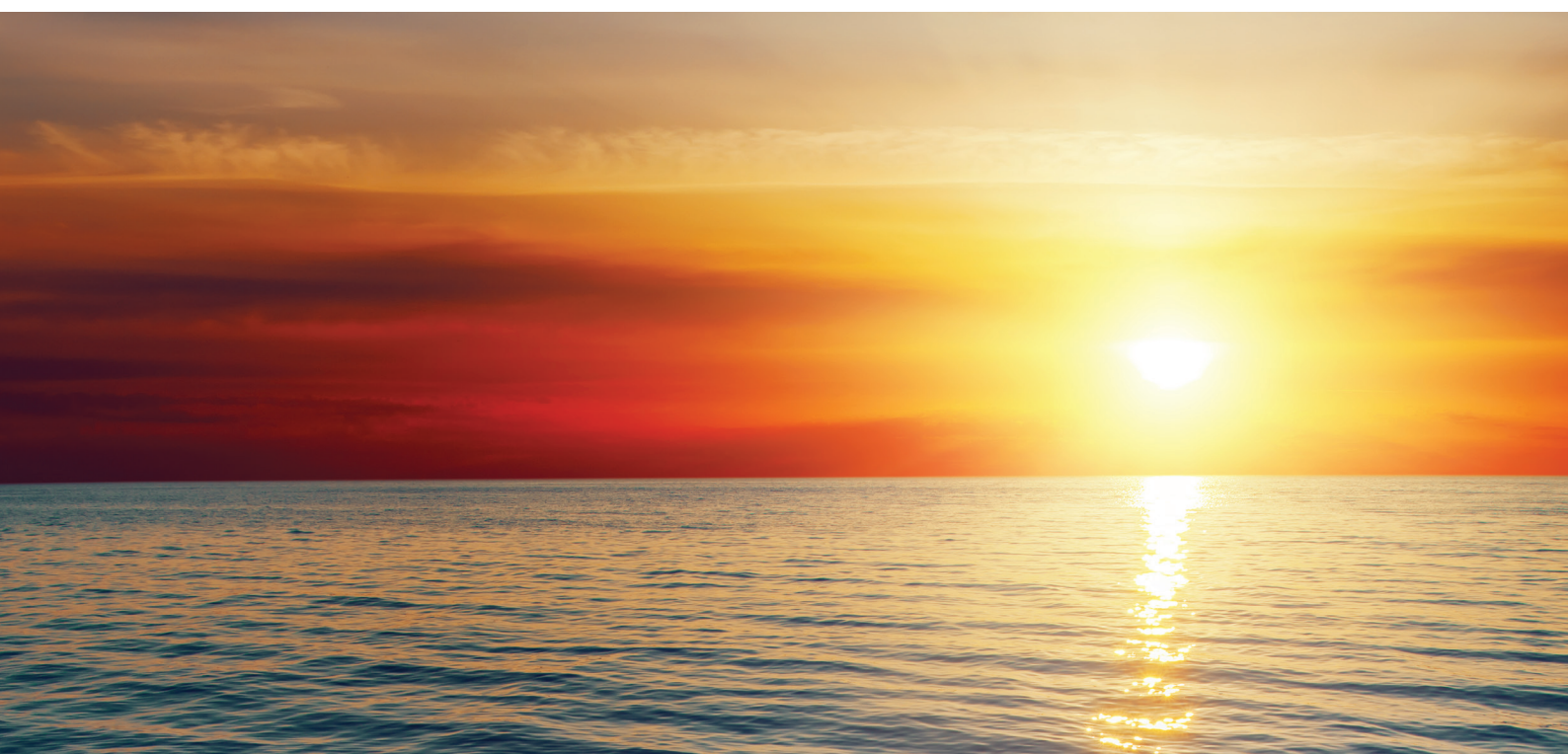
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About Professional Advantage

Professional Advantage is one of Australia's most awarded solutions providers, with over 20 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.

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