



iWorkplace for Not-for-Profit Aged Care Provider

Organisation Background

This organisation is one of the largest not-for-profit aged care providers in Australia, delivering home care, residential aged care, and retirement living services across the state. Its services are designed to support older people to live with dignity, independence, and connection. They take a people-first approach to care, with a strong focus on governance, compliance, and continuous improvement to support quality outcomes for residents and clients.

Customer Challenges

- 1. Fragmented Information Crisis.**
Critical organisational content was scattered across various locations and systems, creating barriers for office-based staff and frontline workers who needed immediate access to procedural content and other important controlled documents. This frustrated staff, who had to spend valuable time searching for documents and questioning their accuracy.
- 2. Legacy Platforms.**
Leaders recognised that reliance on outdated platforms created inefficiencies and heightened the risk of staff working with obsolete information, potentially compromising the high standard of care the organisation is known for.

Their legacy content management platform must be retired due to future concerns about supportability and security risks. Other ageing systems, like File Shares, did not offer the modern controls and access flexibility that users expected.

- 3. Compliance and Risk Pressures.**
The aged care industry's stringent regulatory frameworks require managing substantial volumes of information to ensure safe care delivery and for external and internal reporting. Non-compliance risks regulatory penalties and compromised care quality for vulnerable residents.
- 4. Operational Bottlenecks.**
With thousands of staff accessing policy and sensitive information daily, inefficient processes for creating and finding up-to-date procedural documentation risked negatively affecting prompt, exceptional care delivery.

This aged care provider's information management inefficiencies posed risks to regulatory and care quality in a sector defined by strict compliance requirements.

The Solution

To address this, the organisation partnered with Professional Advantage and adopted **iWorkplace for Microsoft 365**. PA implemented the Controlled Documents, a solution in iWorkplace that ensures critical documents remain approved, protected, and accessible.

The solution ensures staff have quick, reliable access to up-to-date information through a familiar and straightforward user experience, strengthening compliance and supporting the consistent delivery of quality care.

Implementation Approach

The implementation began with a targeted discovery phase identifying pressure points and organisational needs. Professional Advantage's deep Microsoft 365 and content management expertise provided the foundation for addressing their complex challenges while ensuring the solution could be managed internally with minimal ongoing support.

Four primary goals have been targeted:

1. The implementation of an easy-to-use, easy-to-access controlled documents solution.
2. The migration of content from legacy content management platforms to provide a secure and compliant, future-proofed content management platform.
3. The migration of File Share content for better content governance, workflow automation, and compliance reporting.
4. The enablement of guest management automation with improved visibility for access control.

Results and Benefits

The Controlled Documents Solution is a first-phase initiative with the organisation, and the results to date have been rewarding.

- **Simplified User Experience**
iWorkplace provides the organisation with an intuitive platform embedded seamlessly with Microsoft SharePoint and Teams. This ensures that technology enables rather than hinders frontline care workers by allowing staff to quickly locate current policies, procedures, and work instructions from any device.
- **Enhanced Compliance Posture**
Automated metadata application and retention management have strengthened this organisation's compliance framework, ensuring sensitive data protection according to industry standards and regulatory requirements.
- **Reduced Risk Profile**
Staff now have immediate access to current, accurate information, reducing the risk of errors from working with outdated documentation. The platform also enabled migration from a legacy system that is no longer supported, eliminating associated data security risks.
- **Streamlined Administration**
Automating site and folder provisioning, metadata, and retention and disposal labels provides the organisation with a low-touch maintenance platform with built-in governance. User-driven request registers empower the business and streamline operations simultaneously, reducing demands on their IT department for changes and workspace provisioning requests.
- **Cost-Effective Implementation**
iWorkplace helps the organisation achieve information management goals without the expense of Microsoft E5 licensing, delivering a project ROI within 2 years and ongoing savings of over \$200k per annum with licensing alternatives.
- **Scalable Foundation**
iWorkplace for Microsoft 365 provides a platform that adapts and grows with the organisation's evolving needs, ensuring long-term value and sustainability from their chosen content management platform.

Let's Talk

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