

Centralized Training Document Library

CASE STUDY

Challenge

The client faced significant documentation issues within its custodial department:

Decentralized and Inconsistent Documentation: Policies, training materials, and operational documents were scattered, lacked version control, and used inconsistent naming conventions, making retrieval difficult.

Undefined Roles and Responsibilities: Absence of a policy for managing documentation left roles unclear, burdening directors and managers with maintaining the library.

Solution

We developed a streamlined approach to centralize and standardize custodial documentation:

Centralized Repository: A single SharePoint library was created to house all documentation, ensuring easy access and reducing redundancies.

Standardization: Consistent naming, categories, and templates were established, enhancing efficiency and retrieval.

Policy and Role Clarity: Defined responsibilities and a governance structure maintained document quality and compliance.

Task Management Integration: A Power Apps-based system was implemented to track updates, reviews, and translations, supporting ongoing library maintenance.

Results

The solution delivered notable improvements:

Efficiency: Staff accessed documents faster, and the centralized repository streamlined compliance reviews and union negotiations.

Compliance and Accountability: Clear policies and roles reduced errors and fostered ownership.

Cost Savings: Consolidation and standardization cut redundancy and reduced costs.

Enhanced Training: Structured documentation simplified identifying training needs, boosting staff development.



Change Management



Data Modernization



Data Strategy



Rapid Prototyping