



Charter Global

CASE STUDY – SharePoint Customization Regional Banking Franchise

Charter Global's SharePoint site redesign improves operational efficiency and reduces labor hours for bank client.

About Company

The client is a regional banking franchise operating 152 branches across five states in the southeastern United States. In operation since 2010, the organization has grown organically and through acquisition of other banks, including failed, underperforming, and undercapitalized banks. Through its branches, the client offers commercial and consumer loans and deposit products, as well as ancillary financial services.

The Challenge

The client grew rapidly over a short timeframe, and its bank branches were geographically scattered across a wide area. The organization was using SharePoint across the enterprise, but the software had not been updated with the necessary service packages, hot fixes, and important maintenance updates. The outdated technology, along with a lack of adequate policies and procedures, plus inadequate staff training of SharePoint users, created operational inefficiencies.

The client needed skilled IT resources with the necessary technical expertise and understanding of Federal regulations and security requirements, as well as the ability to analyze and address issues in its existing technology platform, to improve efficiency and ensure compliance.

Solution

The client selected Charter Global to provide critical IT staffing and oversee the complex, multifaceted project. After analyzing user needs and determining the client's portal governance requirements, a Charter Global consultant implemented the Enterprise SharePoint application in alignment with Federal compliance regulations. To complete the project, service packages, hot fixes, and cumulative updates were also implemented.

The Charter Global resource developed specialized utility programs and custom web parts using ASP.NET, C#, and SharePoint API to address the client's SharePoint site issues and optimize operational efficiency. In addition, the consultant worked with the client to develop documentation, governance plans, policies, roles, information architecture, global site navigation, and search strategies. By serving as a liaison and troubleshooting between business units and IT throughout the entire process, the Charter Global resource ensured proper configuration of the client's infrastructure.

Results

Charter Global provided staff augmentation and technology expertise to help the client resolve its SharePoint site issues and achieve operational efficiency. The client's SharePoint servers were redesigned to improve performance, and users were trained to use the site effectively and to follow best practices.

Automating manual processes resulted in a measureable reduction of labor hours per week. A weekly call list process, previously tracked in a manual spreadsheet, was moved to SharePoint, saving 640 labor hours per week across the organization. In addition, customer follow up by branch managers and prospect tracking by marketing managers were automated, resulting in a significant reduction in labor hours per week.

Why Charter Global

- Founded in 1994; Headquartered in Atlanta, GA with development centers in the U.S, India, and Serbia.
- Developed a portfolio of over 100 successful project implementations.
- Nearly 1000 full-time IT professionals support client projects.
- Established customer base of Fortune 1000 industry leaders.
- Our experience spans pharmaceutical, manufacturing, telecom, finance, health care, media / entertainment, airlines, energy, retail and hospitality industries.
- Active database of nearly 2M consultants.
- Experienced Talent acquisition teams support client projects.

About Charter Global

Charter Global drives innovation in IT projects and business operations by defining strategy and providing consulting, digital solutions, custom development, and skilled resources. With an established customer base of Fortune 1000 industry leaders and over 100 successful project implementations, our experience and proven methodologies enable our professionals to deliver industry leading solutions in cloud technologies, open source, DevOps, mobility, CRM, AI/ML, AWS, SAP, Microsoft & Pega BPM.