

SharePoint Strategy and Implementation in Siemens Financial Services.



Since 2009, Siemens Financial Services (SFS) has employed Microsoft SharePoint across the company, as CIO Axel Schulte realised at an early date that SharePoint is the ideal business platform. Since roll out, the number of users worldwide has risen to 2,800. To date SFS makes use of more than 30 SharePoint based applications – from room booking tools via product and service requests to credit rating reports.

SFS is a cross-sector business belonging to the Siemens group, which offers financial services in the business-to-business sector. As a high performance business platform, SharePoint provides the perfect foundation for the uniform handling of data across the world, according to SFS CIO Axel Schulte:

“We urgently needed software solutions that could connect colleagues worldwide through their business processes. In the past, a number of isolated solutions were employed in IT. The individual processes were not electronically linked. By introducing MS SharePoint we aimed to create a uniform platform which would enable us to map processes and collaboration applications.”

At the start of the collaboration between SFS and Campana & Schott, selected use cases were introduced in order to evaluate the general suitability of the basic technology for SFS.

Both use cases involved the following:

- Compliance Survey Tool
- Collaboration
- New Product Approval Workflow
- Surveys with Workflow-Support
- Issue Management with Workflow Support

Building on the positive results, Campana & Schott successively introduced new applications for various fields.

SIEMENS

Customer profile

As an international finance provider, SFS provides capital for infrastructure, equipment and operating funds for both Siemens and business-to-business customers – on a worldwide scale.

Customer profile

SFS urgently needed IT solutions that would connect colleagues throughout the world. Many isolated solutions were in operation. The individual processes were not electronically linked. The introduction of SharePoint was intended to create a uniform platform for the mapping of processes and collaboration applications. Use cases for the first processes selected were convincing and quickly created the desire for more.

Solution

Advantages resulting from the introduction of SharePoint:

- A high performance platform for document management, collaboration, portal solutions, workflows, business intelligence, and search functions
- Simple and quick mapping of processes through MS InfoPath
- Complete integration into the existing Microsoft landscape and links to third-party applications (e.g.SAP)
- Newer versions are becoming an increasingly central component of many Microsoft applications, so that focussing on this platform at an early stage promises to yield yet more benefits in the future.

Customer profile

SFS is an international provider of financial solutions for business-to-business customers. With more than 2,800 employees worldwide and an international network of financial companies, SFS works for both Siemens and other companies to provide a broad palette of tailor-made solutions. Numerous internationally and nationally operating industrial and service providing companies, as well as many public contracting authorities, benefit from the individualised finance plans..

Starting point

Before entering into the collaboration with Campana & Schott, SFS had little experience in developing solutions with SharePoint. However, SharePoint had already been used as a document management platform for some time. The aim now was to extend the range of applications. As a result of Siemens AG's strategic decision to use SharePoint as a platform across the company, a gradual evaluation of how new applications could be converted to SharePoint technology was undertaken. The introduction of SharePoint was intended to create a uniform platform for the mapping of processes and collaboration applications.

Solution

- Lead Transfer Tracking
- Investment/Desinvestment Approval Request Tool (I-DART)
- RC Rating Reports – Standard Rating Reports and Financial Model Reports
- New Product/Service Approval
- Issue/Inquiry Management
- Rating Order Management
- SVC Approval
- Compliance Reporting Tool (CORT)
- Program Management
- Project Information Tool (PIT)
- Action Item Tracking
- Collaboration Workplace
- Room Reservation Tool
- Customer Satisfaction Surveys

Results

SharePoint has established itself in SFS as a successful platform, within which new solutions are constantly being developed. These are based on the requirements of the particular fields that work with SharePoint. Over the last three years more than 50 applications have been created in this way. Since then, SFS has profited from:

- The expansion of an established platform for document management, collaboration and the Intranet, as well as the mapping of processes
- A high level of acceptance among users, since it integrates well with Microsoft Office Products
- Low development, running and maintenance costs as a result of using a single development platform
- The acquisition of a high level of skill in SFS's IT department, so that they are able to develop and maintain the applications in house
- Synergies with other areas of the Siemens group which also use SharePoint

Results

Approx. 2,800 employees worldwide work together using the platform, which has now become established within SFS for document management, collaboration and the intranet. Acceptance is high due to the fact that it has simplified processes. For example, laborious processes for sending documents have been replaced by a practical system of checking them in and out of automated workflows. There has been a significant increase in efficiency in collaborations.

Project

since September 2009

Employees

2.800

Partner

Campana & Schott

Sample illustration of a Business Application Rating Report

Starting point

- Analysts conducted extensive research to produce a report on the financial status of a company.
- The data for this report were collected from various SAP systems as well as independently researched and graphically compiled current financial figures.

Target setting

- Reduction in the amount of time required for producing a report.
- Standardisation of the report content, layout and formatting.

Uses / Result

The Business Application Rating Reports is a system that accesses SAP data and provides the analysts with an easy method for enriching this with additional data in the InfoPath form:

- Creation of tables, automatically compiled in graphic form (bar/pie charts)
- Updating trends and evaluations
- Selection of text blocks (company strengths and weaknesses)
- Process:
 - Call up a report from SAP
 - Selection of an appropriate type of report
 - Checking/adding to the data displayed in the InfoPath
 - Creation of a Word report at the press of a button
- Time spent on producing a report reduced from four hours to approx. 30 minutes
- The opportunity to use the reports from the previous year as the basis for the new reports

„With the help of Campana & Schott and close collaboration we were able to implement the various functions of SharePoint in a manner that was best for SFS, and thus contribute to SFS's success.“

Axel Schulte

CIO of SFS

Campana & Schott

Campana & Schott is an international management and technology consultancy whose core business includes all aspects of collaboration among people within organizations and/or projects.

For over 20 years, we have been assisting large corporations and medium-sized enterprises master the changing work environment and complex change processes hostically and with great passion.

Further informationen:
www.campana-schott.com

