

Summary

One of Ottawa's leading providers of professional services to public and private sector organizations relies on Microsoft solutions and Microsoft Gold partner, HELUX, to modernize its information management and content services. After several acquisitions and maintaining legacy, disjointed systems, AIM Group realized it was time to modernize its internal systems.

Challenge

AIM Group used various on-premises systems and legacy databases that were isolated from one another. Due to the lack of connection between the systems, the organization's IT, finance, national, and operations staff often dealt with information silos, making it difficult to effectively respond to its clients. Information spread across multiple databases, making it difficult to collaborate, search, or assemble information of business value to clients or for AIM Group's management reporting.

AIM Group wanted the ability to update information across the system with ease, and to provide its staff and clients with easy way to collaborate and share information.

Strategy

AIM Group worked with Microsoft Gold partner, HELUX, on a digital transformation journey to modernize the management of AIM Group's operations and digital service offerings. As part of this project, teams across the organization worked with HELUX to discuss their pain points, existing and legacy systems, and key use cases for a new modern platform. In assessing their need for better Content Services and collaboration, AIM Group gathered requirements from their Sales & Marketing, Operations, and Finance teams that were followed up with interviews and a review of relevant documents. Based on this research, several key areas were identified as critical to improving the exchange of information within the company and to streamline communications with clients, particularly in the Covid-era.

The new digital platform and recommendations for modernization revealed a need for a cloud-based solution with mobile access, an improved information architecture, business process automation, a migration of existing data to SharePoint Online, and auto-classification of existing content. After evaluating its options, AIM Group chose Microsoft Cloud solutions as its preferred choice including SharePoint Online, Teams, Forms, Flow, Power BI, SharePoint Syntex, Microsoft Viva, and the THEMIS suite of tools for information architecture and intelligent migration (THEMIS IA and THEMIS ICE).

HELUX used our THEMIS IA software to build out an enterprise information architecture reflective of AIM Group's organizational structure and security controls and then performed a file analysis using our THEMIS ICE software. Once we had the ROT analysis complete, we ran auto-classification through SharePoint Syntex and migrated the files to SharePoint Online. Microsoft Teams is used to provide managed collaboration tools and online workspaces and Flow and Power BI provide powerful business process automation capabilities.

Results

The modernization initiative has allowed AIM Group to more easily access their systems from anywhere – onsite, online or on a mobile device – and have access to accurate and up-to-date information for staff and their constituent stakeholders. The net result of the move to Microsoft Cloud solutions for AIM Group is a much improved information management program in their organization and information that is properly classified for collaboration and search. Taken together, the company is now able to trust its information and produce results for its clients with increased speed and efficiency.