

A Global Investment Firm's Modern Workplace Transformation with Microsoft 365 Drives Efficiency and Collaboration

Customer Profile

This Singapore-headquartered global investment firm manages a diverse portfolio worldwide. With a commitment to long-term value creation, it leverages advanced technology and streamlined operational practices to enhance its investment processes and uphold the highest standards of efficiency and transparency.

Location

Singapore

Industry

Finance

Platform

Microsoft 365

Critical Needs

- A responsive and collaborative platform for document management
- A flexible and secure platform to collaborate and share internal documents
- A robust onboarding solution to bring users up to speed in new software deployments

Solution

Modern Workplace Transformation

Success Highlights

- Increase in user adoption of and engagement with Microsoft 365
- Streamlined document management and collaboration processes
- Improvement in productivity and efficiency across the organisation

The Challenge

The investment firm was using an on-premises infrastructure that caused multiple inefficiencies in its workforce, including:

- **Performance lags.** Its users experienced delays in its electronic document management system when the workforce from multiple offices worked on the same documents or when a document – especially of considerable size – was being uploaded. Accessing electronic documents from a remote or overseas location was also slow and did not allow for effective mobility, limiting the workforce's access to documents outside the on-premises infrastructure.
- **Fragmented communication channels.** The firm faced significant hurdles due to disjointed communication pathways. Emails are the firm's primary mode of communication, which hampered real-time collaboration among multiple stakeholders and led to inefficiencies in information sharing.

- **Lack of mobility.** The firm's outdated systems prevented users from accessing documents and workspaces remotely on any device, hampering real-time collaboration.

The AvePoint Solution

The global investment firm, in its pursuit of innovation, partnered with AvePoint to drive its digital transformation journey, transitioning to Microsoft 365's cloud-based platform across the organisation. This strategic move aimed to create a modern workplace that enhances collaboration, boosts productivity, and improves communication while fostering a culture of digital fluency and operational efficiency.

To support the firm's transition, AvePoint delivered a comprehensive Modern Workplace Transformation solution powered by the Microsoft 365 suite, including OneDrive, SharePoint Online, Microsoft Teams, and Exchange Online. The solution encompassed tenant planning and configuration, customised enhancements, and tailored optimisations to elevate user experience, drive adoption, and streamline document management. To ensure digital workspace security, AvePoint implemented its governance framework in Microsoft 365, securing communications and file sharing to ensure access is granted only to authorised users. Additionally, Azure Active Directory Conditional Access was introduced to configure access policies, maintaining a collaborative yet secure environment.

To maximise user adoption, AvePoint designed a tailored onboarding experience to simplify the learning process and ensure full utilisation of the platform's features.

The Road Ahead

As the investment firm continues to enhance its digital transformation journey, the organisation is committed to leveraging Microsoft 365's full potential.

AvePoint's tailored Microsoft 365 Modern Workplace solution has significantly improved operational efficiency, reduced response times, and enhanced service delivery. With its cloud-based infrastructure, the investment firm expects to scale faster and securely, and have a more collaborative and productive workforce. It will also utilise the onboarding tools to introduce its custom Microsoft 365 implementation to the new members of the organisation, helping them make the most of the Microsoft 365 suite.



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