

Enabling
a Leading Credit Union to
Optimize its
IT Infrastructure
with Microsoft 365
Assessment

Established in 1940, our customer is a leading credit union headquartered in Folsom, California. It provides financial products and banking services such as credit cards, mortgages, commercial lending, auto loans, investment and retirement plans, business banking, etc. The credit union was leveraging SharePoint 2016 Intranet to ensure seamless collaboration and communication among its teams spread across three locations.

Poor User Experience Creating Collaboration Bottlenecks

However, the business users faced various issues with the usability of the existing Intranet. User experience was impacted by the existing workflows, automations, Intranet pages and features. The existing Intranet delivered a poor search experience and users required multiple clicks to find the desired information. Such inefficiencies in the Intranet were impacting the efficiency of the organization. Consequently, the management at credit union decided to seek help from an experienced technology partner with vast experience in Microsoft technologies.

The management wanted to address the existing challenges by modernizing its workplace technologies. The credit union wanted a technology partner to conduct thorough assessment of the existing Intranet and other workplace technologies and deliver a prioritized, actionable roadmap identifying desired future state that matches with business requirements, utilizing Microsoft 365 and generate ROI of their existing licensing.

AgreeYa's envious record of accomplishment and comprehensive suite of Microsoft assessment and planning services with industry-specific expertise made us an ideal technology partner for the leading credit union.

“Our SharePoint Intranet was hindering collaboration and user experience, impacting operations.”

- Vice President of IT Operations, The Credit Union

Delivering a Comprehensive Roadmap for Workplace Modernization

As a Microsoft Solutions Partner and Cloud Solutions Provider, AgreeYa has been helping various organizations in banking, financial services and insurance (BFSI) space increase efficiency, enable seamless collaboration, simplify user experience, implement automation, and succeed with new technology implementations.

As a part of our Microsoft 365 assessment services, we conducted a thorough assessment of the customer's existing SharePoint on-premises environment and Microsoft 365 licenses. Our experts held in-depth discussions with key stakeholders to understand the exact expectations.

Based on our inferences, we shared the following recommendations with the customer's team:

Replace Nintex Forms and Workflows with Microsoft Power Automate: It was evident that the six existing Nintex workflows were proving insufficient to meet the business needs. These workflows were linked with 20 forms. During our conversations with IT and management, we understood that the organization's existing Microsoft 365 licenses included access to Power Platform workloads such as Power Automate. Hence, we suggested the replacement of these Nintex forms and workflows with Microsoft Power Automate.

Migration of On-premises Blog with News feature in Teams/SharePoint Online: Our team shared an actionable plan to migrate on-premises blog and replace with News feature in Teams/SharePoint Online. The migration would help users stay in the know and read key company news in the flow of work.

Migration of existing SharePoint Home Page to Microsoft Viva Connections: Modern Intranet home pages are a hub of information and activity. We suggested modernization of Intranet home page to ensure better user experience. Microsoft Viva Connections delivers various web parts to deliver a modern employee experience via SharePoint home page. Viva Connections is designed to keep all users engaged and informed. It can be a personalized destination to discover other Viva apps, relevant news, conversations, and the tools modern day employees need to succeed.

Migration of SharePoint Sites: We delivered an actionable roadmap for the migration of eight key on-premises sites, including custom built applications to Teams/SharePoint Online. This includes more than 15 workflows from HR's volunteer site.

As a part of our trustworthy assessment and planning services, we offered technology environment evaluations, technical architecture reviews, security assessments, gap analysis, etc. to realize the full potential of their organizational needs. We created a roadmap and scope of work packages with a comprehensive set of project-specific activities that can enhance the customer's organizational performance and help them stay ahead of the competition.

Enhancing Workplace Efficiency through Modernization

AgreeYa's team of experts were able to share a comprehensive and specific set of recommendations for workplace modernization. Our goal was to accelerate productivity, enhance collaboration and keep everyone informed, while reducing the technology investment. Our report provided inputs on how to utilize various tools and implement new technologies. Some of the projected benefits of our assessment and planning services include:

Significant reduction in operational costs with decreased maintenance expenses.

Zero risks of security incidents.

1.5X increase in the overall productivity within the organization.

2X increase in Intranet adoption.

Enhanced collaboration facilitating remote and hybrid work.

Based on the value we were able to deliver and our expertise, the customer has approached us to implement Microsoft 365 to modernize its workplace and deliver a superior user experience.

“AgreeYa's Microsoft assessment and planning services have been transformative. They've ensured seamless collaboration and improved efficiency in our workplace, making a significant positive impact.”

- Vice President of IT Operations, The Credit Union



Technology Stack



About AgreeYa

AgreeYa Solutions is a leading technology service and consulting company at the forefront of developing innovative solutions to meet the intricate demands of our clients' digital transformation journeys. We excel in diverse domains such as data and AI, automation, engineering, cybersecurity, modern workplace solutions, decision science, intelligent automation, cloud transformation, quality engineering, mobility, and talent management. Since our establishment in 1999, with headquarters in Folsom, California, AgreeYa Solutions has grown to become a formidable team of over 2200 dedicated professionals. We serve clients across the United States, India, EMEA, and Mexico, ensuring the delivery of top-tier solutions and services that make a positive impact on a global scale. At AgreeYa Solutions, we prioritize excellence in quality, reliability, and customer service. Our notable achievements include prestigious certifications such as Microsoft Solutions Partner and Cloud Solutions Provider, AICPA SOC 2 Type 2, SEI CMMI, and ISO 9001:2015. We have also received esteemed awards, including recognition as "Best Company To Work For," "Champions of DEI," and numerous others. AgreeYa Solutions remains committed to forging enduring partnerships and driving success in the ever-evolving world of technology and business.



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