

TMF
GROUP

Overview

Country or Region: Netherlands

Industry: Professional Services

Customer Profile

TMF Group provides accounting and corporate secretarial services to companies worldwide. The Netherlands-based firm has 87 offices in 66 countries and 3,500 employees.

Business Situation

TMF Group needed to standardize its document management. It had grown through acquisitions, and teams had difficulty finding information quickly.

Solution

TMF Group chose Microsoft SharePoint Server 2010 as the foundation for a global document management system. Documents are organized automatically and are accessible from a centralized customer site.

Benefits

- Streamlined development, flexible environment
- Centralized, standardized document management
- Better customer service

Accounting Firm Centralizes Document Management, Enhances Customer Service

“SharePoint Server 2010 provides us with a robust document management solution as well as a platform to grow into. We will be able to take advantage of many other features and capabilities in the future.”

Rufus Plantz, Chief Information Officer, TMF Group

TMF Group, a global provider of accounting and corporate secretarial services, wanted to make it easier for account teams in 66 different countries to find and share customer documents. The company decided to deploy Microsoft SharePoint Server 2010 as the foundation for an enterprise wide document management system. Using the solution, the company will be able to automatically organize, categorize and store customer files in SharePoint sites, which will provide account teams with immediate access to documents and information. Employees will be able to respond to customers faster because they won't have to wait for documents to be sent to them across time zones from other locations. The company also will be better able to ensure that each customer has completed essential compliance steps. Single point of contact for attracting more global clients. The unified offering will also help us retain and broaden services for our clients with global requirements. Overall, TMF Group will use the new global system to function in a more unified, professional manner.

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Rufus Plantz, Chief Information Officer,
TMF Group

Situation

TMF Group, established in 1988, is one of the world’s major independent providers of accounting and corporate secretarial services, including bookkeeping, reporting, human resources, and payroll. TMF Group is based in the Netherlands, but has a global presence, with approximately 3,500 employees working from 87 offices in 66 countries.

TMF Group has experienced tremendous growth, largely through acquisitions, and expects to double the size of its network of offices in the next few years. One of the capabilities the company offers is “a single point of contact” for customers with locations and offices in more than one country. To maintain this single point of contact, a global account manager must coordinate all management and accounting services for a customer, which requires gathering information and furnishing reports from the company’s worldwide network of offices.

However, account managers were challenged by the fact that TMF Group did not have a centralized, standardized system for document management. Employees relied on file share-based methods and email for storing and sharing customer information, including contract proposals, budgetary worksheets, and status reports. Information often existed in silos: on local and network file shares, storage appliances, and in Microsoft Office SharePoint Server 2007-based portal sites. Some of the offices that were acquired by TMF Group continued to use their pre-acquisition document management systems. Rufus Plantz, Chief Information Officer at TMF Group says, “Without a comprehensive content management environment in place,

employees spent a great deal of time consolidating information, trying to maintain version control, and preventing duplication of their efforts.”

With customers located in different time zones, it was also challenging for teams to access project information on demand, in order to respond to customers’ needs. Anna Buckingham, Project Manager at TMF Group, adds, “More of our customers were asking us to provide services for their business in more than one country. We needed to make it easier on our business to do this.”

TMF Group also goes through a compliance process with each new customer. “We need to ensure that we have all the necessary documentation on a client,” notes Plantz. Documentation may include contracts, background information, accounting information, and terms of service. “We screen our customers’ accounting practices to ensure that we will be meeting legislated standards in working with them,” says Plantz. Compliancy is one of the main reasons to choose for TMF as a customer.

Solution

In 2009, TMF Group analyzed its business processes very closely to see what capabilities it needed to construct an effective document management environment. After determining that it needed version control management, records management, and automated routing, it then sent out a request for proposals to technology companies that specialized in document management solutions.

"We thought we could save a lot of time with SharePoint Server 2010."

Roel Hans Bethlehem, Lead Developer and Architect, Sparked

TMF Group found that the most promising solutions were proposed by companies who used Microsoft SharePoint Server as their foundation for document management. This was good news for the company, as it had already begun to implement Microsoft Office SharePoint Server 2007 for departmental collaboration. "Going with a SharePoint Server-based solution fit with our overall infrastructure strategy," says Plantz. TMF Group relies on other foundational Microsoft products and technologies, such as Microsoft Dynamics business management solutions for internal and customer accounting. "Also, we knew that we could grow into the solution because it provides much more than document management," says Plantz.

TMF Group opted to implement the newer version of the product, Microsoft SharePoint Server 2010, because it felt that it could benefit from the product's many feature enhancements. TMF Group chose Sparked to help implement its document management solution. Sparked is a Microsoft Gold Certified partner that specializes in building solutions using SharePoint Server 2010 and is located in Amsterdam. "The document management features in SharePoint Server 2010 are very robust, out-of-the-box. In earlier versions, these features required more custom development. We thought we could save a lot of time with SharePoint Server 2010," says Roel Hans Bethlehem, Lead Developer and Architect, and consultant at Sparked.

Working with Sparked, TMF Group designed a solution architecture in December 2009, and began development in early 2010. Bethlehem's development team is currently in the test phase and plans to move the solution to

the production environment by July 2010. The company will then begin a phased rollout, starting with account teams in the Netherlands. TMF Group expects to have all of its 3,500 employees worldwide using the new document management solution by April 2011.

The Sparked team is using Visual Studio 2010 Ultimate, with Visual Studio Team Foundation Server 2010 and SharePoint Designer 2010, to customize the solution. "With Visual Studio 2010, we have very few dependencies on external tools," says Bethlehem. With SharePoint Designer 2010, developers can connect the document management system to data in external systems, using Business Connectivity Services (BCS). "BCS lets us hook into other systems, such as the TMF Group customer list that is stored in Microsoft Dynamics," explains Bethlehem.

The company's SharePoint Server 2010 farm is located, for redundancy, at two data centers in the Netherlands, and relies on a Dell-based storage solution. "With our infrastructure design, we are aiming for a low restore time if there are any issues. This way, we can deliver a higher service level to TMF Group users," explains Bethlehem.

In the new system, TMF Group users will enter a web-based portal through customized My Sites, personal websites that provide employees with a central location to manage tasks. They will have access to the list of customers they are doing work for, and a task list that includes alerts to help them prioritize work. Each customer's documents and information will be located on a separate SharePoint site. As the company receives paper-based documents in the mail,

“SharePoint Server 2010 helps us ensure that clients have gone through the compliance process.”

Rufus Plantz, Chief Information Officer,
TMF Group

eCopy software on the multifunctionals will be used to scan documents directly into the DMS, digitized, and automatically routed and uploaded to these customer sites based on content types documents will be routed to the correct library. Employees can also forward documents that they receive from customers in email messages directly to a team site.

TMF Group is using SharePoint Server 2010 Content Type Hub feature for centralized management of content types, which specify the content fields, policies, workflows, templates, and other rules for a specific kind of content, such as a customer contract across thousands of teamsites. “Once a customer document enters a team site,” explains Bethlehem, “it is routed to the appropriate document library within the customer site.” Metadata is then automatically extracted from the document, and is applied as tags according to a centrally defined taxonomy. “By using metadata and content types, we’ll be able to manage all documents related to each customer in a more consistent manner,” says Bethlehem.

TMF Group also is using other out-of-the-box SharePoint Server 2010 document management features, such as the ability to assign each document with a unique identification number and URL, so that documents can be retrieved regardless of how many times they are moved within a site collection. The company also uses enhanced records management capabilities to allow authorized employees to easily designate certain customers’ documents as official files, so that proper legal holds and retention policies can be applied.

Initially, TMF Group will use SharePoint Server 2010 enterprise search to help employees find information faster. Features include an intuitive search interface with search refinements (clickable options displayed down the left-hand side of the search results page that sort search results into useful categories such as type of content, location, author, or date last modified), an improved relevancy ranking model, and similarity search.

Benefits

TMF Group chose Microsoft SharePoint Server 2010 as the foundation for an enterprise wide document management system. Development has been efficient, and although the project is still in its initial stages, the company looks forward to using the centralized global system with its new capabilities. Ultimately, the solution will lead to faster service for TMF Group customers. We will be able to accommodate higher volume and happier customers.

Streamlined Development, Flexible Environment

TMF Group is using Visual Studio 2010 development tools to customize its new document management environment, and developers have found the experience to be very smooth. “There is so much improvement in Visual Studio 2010 that our team uses very few other tools. The process to build and deploy SharePoint Server packages is straightforward and efficient,” says Bethlehem. “We do continuous, nightly builds with Visual Studio Team Foundation Server 2010. It’s been a great experience.” Bethlehem’s team also can easily connect to external data sources to

incorporate customer information in the newer environment, using SharePoint Server 2010 Business Connectivity Services.

The business Connectivity Services are used to connect with other software packages in the TMF software landscape. Besides the creation of the DMS TMF has decided to implement the concept of Master Data Services using SQL-Server 2008 and an Enterprise Service Bus using Biztalk 2009. These projects are setup with a broader scope than the DMS but the first functionality and data being provided through these technologies are geared towards the needs the DMS has. Both projects were architected and lead by Remi Caron strategic consultant and BI-specialist at Sparked.

Although TMF Group will focus the initial deployment on document management, it chose SharePoint Server 2010 because it also provides a comprehensive platform for collaboration. "Our organization is very dispersed," says Plantz, "The product's social networking features can help us better mine our existing skill sets to create even greater synergy with customers. SharePoint Server 2010 provides us with a robust document management solution as well as a platform to grow into. We will be able to take advantage of many other features and capabilities in the future."

Centralized, Standardized Document Management

With the solution, TMF Group employees, no matter where they are located, will have access to the latest versions of documents. Because users will rely on the centralized customer site to store and share documents, they will no longer need to send versions back and forth in email. "Version control will

be greatly enhanced with SharePoint Server 2010," says Plantz. "And employees will be able to work on documents from within these libraries, remotely, using Office 2010 tools."

With the centralized environment, TMF Group also will find it easier to maintain compliance. "When you have a central document store, account teams can easily see what is present in the file of a client. If a document is missing, you can go after it. SharePoint Server 2010 helps us ensure that clients have gone through the compliance process, that all their files are in order, and that we are able to begin working with them," says Plantz.

Better Customer Service

TMF Group believes that its account teams will be able to use the solution to respond to customers more quickly. Buckingham explains, "When teams share information through email, time zone differences mean that customers sometimes have to wait until the account team can get the information it needs from a different office. With SharePoint Server 2010, customer documents and information will be stored centrally and therefore available at all hours, to all locations."

By having readily available, updated, consistent information, TMF Group will be able to maintain its reputation of professionalism and excellent service. "We'll be able to further enhance our image, and we'll have an even more professional appearance," says Buckingham. "As a global organization, our processes and systems vary by region. This will continue to be the case. Even so, the SharePoint Server 2010 document management system will help us streamline our work, be more consistent, and appear to our customers

For More Information

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For more information about Sparked products and services, call +31 (0)20 44 20 620 or visit the Web site at: <http://www.sparked.nl/>



For more information about TMF Group products and services, call +31(0)20 575 56 00 or visit the Web site at: www.tmf-group.com

as a unified organization." The system will make it easier for account managers to live up to the 'single point of contact' expectation. "Our global account managers will no longer have to gather and organize information from as many as 60 different countries, for a single client. With SharePoint Server 2010, they will be able to dip into the system and get the updated information they need—almost instantly."

Microsoft SharePoint Server 2010

Microsoft SharePoint Server 2010 is the business collaboration platform for the enterprise and the Web.

For more information about Microsoft SharePoint Server 2010, go to: www.microsoft.com/sharepoint

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