



IPP Drives Business Productivity with SharePoint Portal, Collaboration and Content Management Solution



Company
IPP Financial Advisers Pte Ltd

Website
www.ippfa.com

Profile
IPP was founded in Singapore in 1983 to provide Comprehensive Life Insurance, Investment Planning and latterly Investment Advice in 1988. Our clients are affluent business executives, professionals and business owners.

IPP is staffed by a team of qualified Financial Practitioners focusing in the area of comprehensive life insurance, investment and financial planning. Our Advisers consist of people from diverse backgrounds such as investment, life insurance, banking, financial, accounting, taxation, economics, engineering and other financial services.

IPP Director/Chairman is the Inaugural Chairman of Asia Pacific Life Insurance Council and also the first in the Region to be granted these designations - Chartered Financial Consultant (ChFC) and Chartered Life Underwriter (CLU).

Project Size
IPP has total staff strength of 50 and over 350 Financial Advisers Representatives in the local Singapore office.

About Micro 2000
Micro 2000 Technology Pte Ltd was established in 1996 and is now ranked as one of the top Premium Business Partner of HP, IBM, Microsoft as well as Sun Microsystems.

Its business includes IT consultancy and integration services, support and maintenance services as well as turnkey solution. Through these years, Micro 2000 have proven their business efficiency, which led to various partnerships: Appointed Apple GOLD Authorized Service Center, HP Premium Solution Partner, SonicWall Medallion Partner, Cisco Certified Partner, Microsoft GOLD Certified Partner, to name a few.



IPP Financial Advisers Pte Ltd is a leader and pioneer in comprehensive financial planning advisory services. In 2008, due to the management growing demand of timely information and the huge increased in man hours and staff strength taken to process Applications Forms, IPP decided to take advantage of Office SharePoint Server as an integrated platform to let the team collaborates through the use of a Portal and Content Management System.

The Situation

IPP faces considerable challenges when creating Clients' Applications Forms and managing their content. The process is labor intensive, time consuming and prompt to data entry by the Administrative Staff. The content is often located in disparate systems and is difficult to access. With today growing business, bringing the manual scanning of the Forms documents up-to-speed can be very challenging for the Administrative staff as well.

The company also requires a Content Mangement System that simplifies content harvesting and publication. Especially for timely data required by the management, IPP needs an automated proccesss that enables the Administrative staff to make forms data available for reuse without the help of an administrator.

The Solution

To address the issues, Micro 2000 Technology proposed to IPP to implement Microsoft Office SharePoint Server 2007, Microsoft Exchange 2007, Microsoft Outlook 2007 and Microsoft SQL Server 2008.

The implementation of the Microsoft Office SharePoint Server 2007 also includes:

- Intranet Portal for IPP Staff and Financial Adviser Representative
- Content, Document and Record Management for Financial Adviser Representative
- Tracking of Financial Adviser Representative Training Hours
- Registration of Training Event

This Implementation helps IPP streamline Document Creation and Assembly by uploading OCR scanned documents, with file renamed and data validation mechanism custom built by Micro 2000 in place. These documents are then uploaded in an automated process in the Portal for review, reuse and sharing.

The Benefits

IPP management and staff have easier access to content from within Microsoft Office SharePoint Server 2007. Through the automated processes IPP has leveraged her intellectual capital by facilitating content capture and reuse.

This streamlined proccesses for Client Forms Data Review and Posting has reduced manpower by 75% due to the decrease of from having previously 12 staff handling the forms process to 4 now.

At the end of the implementation, IPP enjoys higher productivity in document processing and data gathering. IPP Financial Advisers has also been provided higher mobility due to the use of the Portal features. The IT department benefits from the ease of maintaining an integrated platform.

For more information, please visit <http://www.micro2000.com.sg>
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