

# Many needs, One solution: SharePoint 2007

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Case Study: Prudential Douglas Elliman





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## **Prudential Douglas Elliman – many needs, one solution – SharePoint 2007**

Prudential Douglas Elliman, one of the largest Prudential Realtors in North America with 4,400 agents and 70 offices, had developed a number of silos of information as a result of several mergers, acquisitions and roll ups. Gig Werks met with the CIO of Elliman where several pain points were identified: separate intranets existed from one region to another for its agents; content management was too complex for direct management by the various departments in charge of their data; and with more than a dozen data sources a need for consolidated views of its business data had become more than problematic.

Elliman was considering various proprietary and stand alone solutions - Cognos for its BI needs; a separate enterprise content management system; and the redevelopment of its corporate intranet. Gig Werks was able to show the CIO and other key stakeholders how to leverage their existing Microsoft investment and how both current and future needs could be addressed through the adoption of a single solution – SharePoint 2007.

The initial solution components required the redevelopment and consolidation of the firm's intranet portal to support its 4,000+ agents and brokers, the other was to automate the creation, distribution and retention of market and financial reports.

### **Business Intelligence**

With more than a dozen data sources, a need for consolidated views of its business data had become more than problematic. The creation of many critical and key financial and market reports in use at Elliman represented a pain staking and time consuming process requiring the constant involvement of both functional and technical resources to generate. Gig Werks designed a SQL 2005 data warehouse - leveraging Database, Integration and Reporting services - to aggregate all of Prudential's data by writing SSIS packages (SQL Server 2005 Integration Services). This gave Elliman near real time, self service reporting capabilities. By storing and accessing these reports through SharePoint, in SharePoint Integration Mode, these reports are now easily and widely distributed, while enjoying the controlled access that SharePoint 2007's audience feature provides.

### **Collaboration**

One of the historic challenges of the creation of a single, companywide Intranet was the need to segregate data on Elliman's intranet by region. Once again, the audiences feature within SharePoint played a critical role in the delivered solutions success. Information for all users is seen by all users, information specific to a particular region is only shown to agents from that region. Additionally, internally sensitive data and departments, such as Finance are completely occluded from public view.



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Another key objective was to allow Elliman's sales and marketing departments to deliver data in a targeted and engaging way. A number of features and techniques were utilized to accomplish the solutions requirements. Custom style sheets, web parts, and Silverlight technology for an enhanced photo and video experience, allowed Gig Werks to create a visually compelling site that allowed for easy control by those departments required to maintain and promote specific content. SharePoint Designer was used to develop custom views and grids to control look, feel and behaviors for the site's video archive.

To realize data integrity and enhanced business process efficiencies custom InfoPath forms were developed to automate a number of formerly paper driven processes.

### **Future Use**

With the successful deployment of the projects initial goals, Prudential Douglas Elliman has already begun planning the extension of SharePoint's roll within their Enterprise. To gain even greater value from Elliman's SharePoint investment, projects such as the development of their public site and an agent CRM have been targeted for 2008 and 2009.