INFORMATION LEADERSHIP

Leapfrogging into the digital future

Case Study: Tasman District Council

Microsoft New Zealand Partner Awards 2020 — WINNER Empowering Employees

2020 ALGIM RUNNER UP Fast-Tracked Project

Abel Tasman Te Puketea
Marahau Sea Kayaks

Contents

About Tasman District

Tasman District Council performs the functions of both a regional council and a city or district council. This includes services and facilities such as rubbish recycling, libraries and pools, dog licensing and water and sewerage systems. This means that Tasman District Council has a broad scope of activities, data sets and governing regulations.

A role model for other councils

The deployment of Microsoft 365 enabled Tasman DC to completely transform its employee experience. The solution has made extensive use of Microsoft Teams, the Power Platform and SharePoint online. In under 6 months, Tasman DC was able to replace its legacy document management system and file shares with a modern digital workplace.

Tasman's experience shows how organisations can quickly achieve massive gains in productivity and efficiency. Organisational risk has been reduced and compliance needs are being met. The TDC experience is a role model for all 77 other Councils and for all public sector organisations that have serious compliance and regulatory responsibilities and want to act quickly and responsibly.

Steve Manners, Tasman District Council CIO sums it up: "The foundation for our efficiency and our operational effectiveness lay in having Office productivity systems based on Microsoft Stack"

"We decided we really needed to take the plunge and jump in boots and all"

- Janine Dowding,
 Chief Executive Officer

Challenges

Tasman District Council's aging systems were not meeting the needs of its employees.

Key processes such as resource consents were reliant on paper.

There were high demands on staff time, driven by an increase in Official Information Act requests due to controversial infrastructure projects such as the Waimea Dam and Golden Bay Grandstand.

TDC had a wealth of information, that would be useful to ratepayers, that it was struggling to present in meaningful ways.

When Covid-19 lockdown arrived only one in five staff were equipped to work from home!

Prepare to meet DORIS!

DORIS is going to help us achieve great things. We're aiming to:

- Lead the way in openess and transparency
- Exemplify best practice information management
- Work more efficiently
- Ensure service improvement
- Foster strong partnerships internally and with our community

Microsoft 365 tools: empowering employees to do a great job

The Power Platform is empowering business analysts to deliver timely, critical, information to ratepayers.

Collaboration and concurrent editing saves time and gets better results.

Microsoft 365

Enterprise Search is making it easier for employees to access key information needed in Council processes: resource consents, property files, infrastructure information and contracts.

The legacy – and unloved – document management system has been retired in favour of Microsoft 365. 750,000 documents migrated.

Provisioning thousands of consistent sites and Teams including autoclassification, powered by Azure based Apps.

Full training solution using Stream and SharePoint online is helping staff get the most from Microsoft.

Tools such as Planner and Microsoft Forms are providing new and simpler ways of working.

LGOIMA. Microsoft 365 is making it quicker and easier for TDC to respond to LOGIMA (Official Information Act) and Privacy Act requests.

Lantern Celebration
Tim Cuff - Nelson City Council

Empowering Employees

The Tasman District Council deployment of Microsoft 365 shows how organisations can quickly achieve massive gains in productivity and efficiency. In addition, organisational risk has been reduced and compliance needs are now being met.

Giving employees information at their fingertips, no matter where it's stored

Empowering staff. Microsoft 365 provides a single place for employees to access all the information they need to do their jobs. The combined document management system and intranet is affectionately called 'DORIS' which stands for Digital Office Records and Information System. The personality is amplified by a juicy 'Black Doris' plum logo featured on staff t-shirts and posters.

- Peter Darlington, IS Manager

"It has become the place to go for your work - plus we got extensibility into the mobile workplace too and that's without configuration – it just comes out of the box."

EDRMS & ERP Migration

"We've pushed 750,000 documents out of Silent One [the old EDRMS] into our new system. That's no mean feat. We also store documents in our Magic [ERP] system, and they've had to come across as well to create that one-stop shop that we were aiming for" says Peter Darlington, IS Manager

> "Staff are hitting the top search box and going straight to the folder they need, often surprised at how useful the results are. With a good information structure in place, they can also refine search with keywords, and as if by magic, the document they want is in the top of the queue."

- Peter Darlington, IS Manager
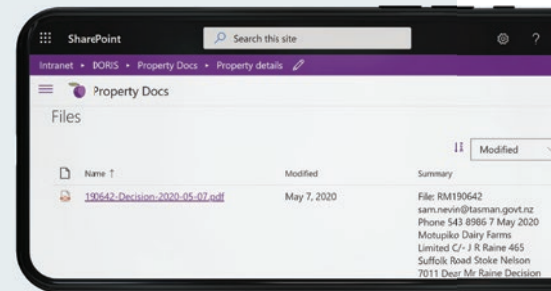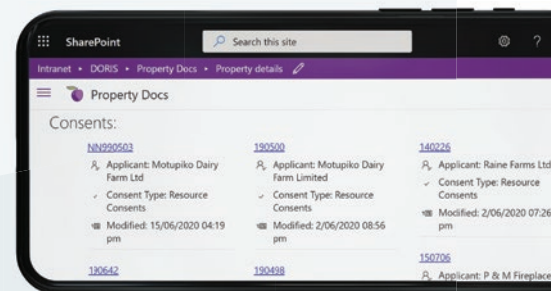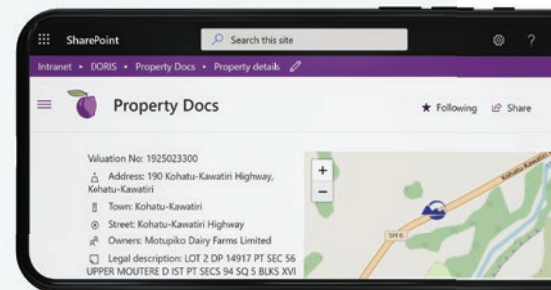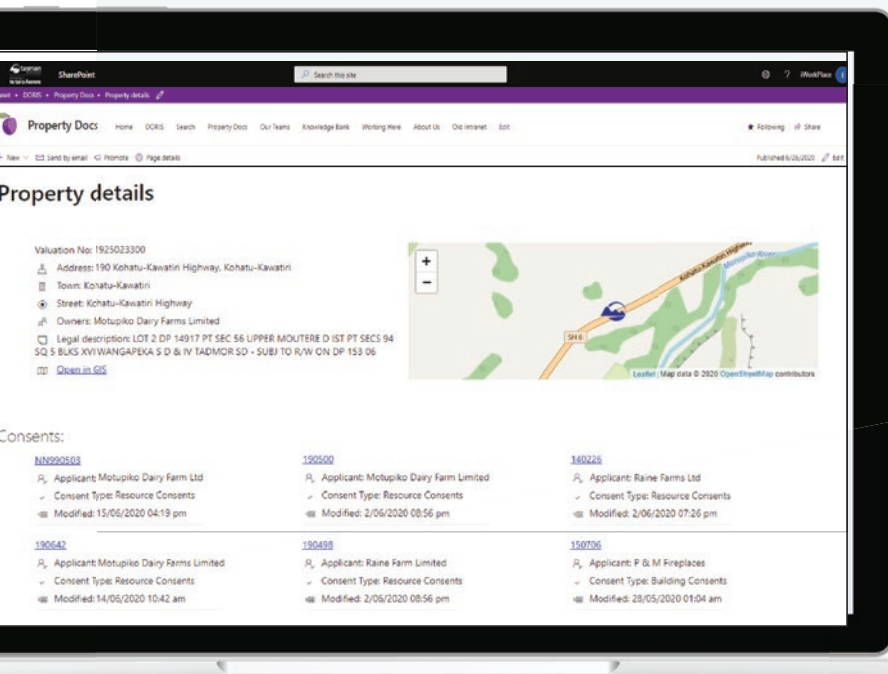
Live integration with enterprise ERP...

so that case files, property data and consent processing information is available alongside information managed in Microsoft 365. This also allows staff to tag documents with property and customer IDs.

Paperless

> "We're scanning all personnel files and getting those across into DORIS – we'll be going to be paperless. It means we're going to be able to get rid of about four cabinets out of the room to make room for another desk."

- Joanna Cranness, Human Resources Manager

Empowering employees with tools that fuel collaboration and productivity

As lockdown hit TDC rapidly deployed Microsoft Teams – with Information Leadership's Teams Framework. This meant that TDC could enjoy all the benefits of Teams without worrying about its governance and compliance needs.

Rapid adoption of Microsoft Teams by Tasman staff at the start of Covid-19 lock down and sustained use as lock down lifted
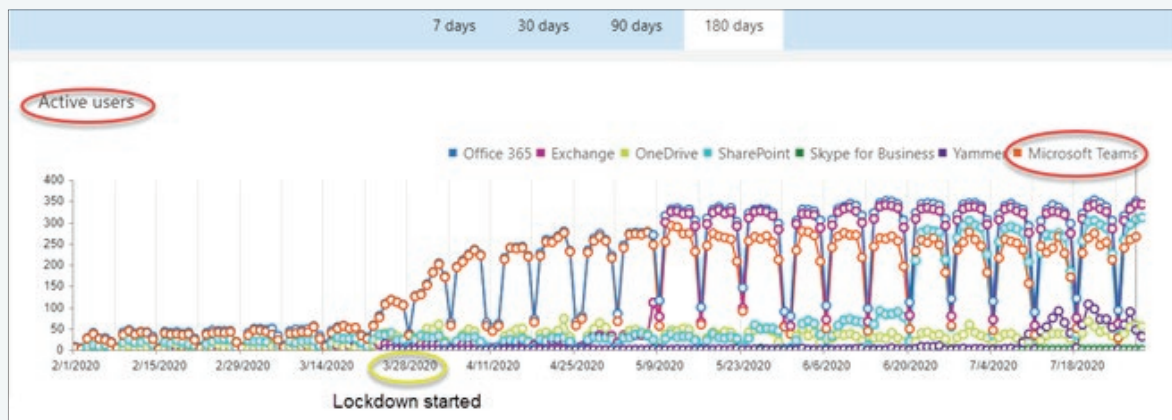
– Chris Blythe, Project Manager

"Using the mentors, we rolled Teams out to 300 staff in just 10 ten days."

"What I'm most proud about is the way my team has taken advantage of how these new technologies can deliver **amazing outcomes for our people.**"

- Steve Manners,
Chief Information Officer

Benefits of Teams governance and collaboration

- Compliance-grade document management through the deliberate design of Teams and Channels in conjunction with SharePoint Online functionality

- Being able to switch to video and remote working as required for operational and Covid lock down needs

- Content easy to find and no confusion about which Team to collaborate in

- Content created is available to people outside the Team, as needed for medium-long term queries

- Easy to use and powerful task management and coordination with Planner
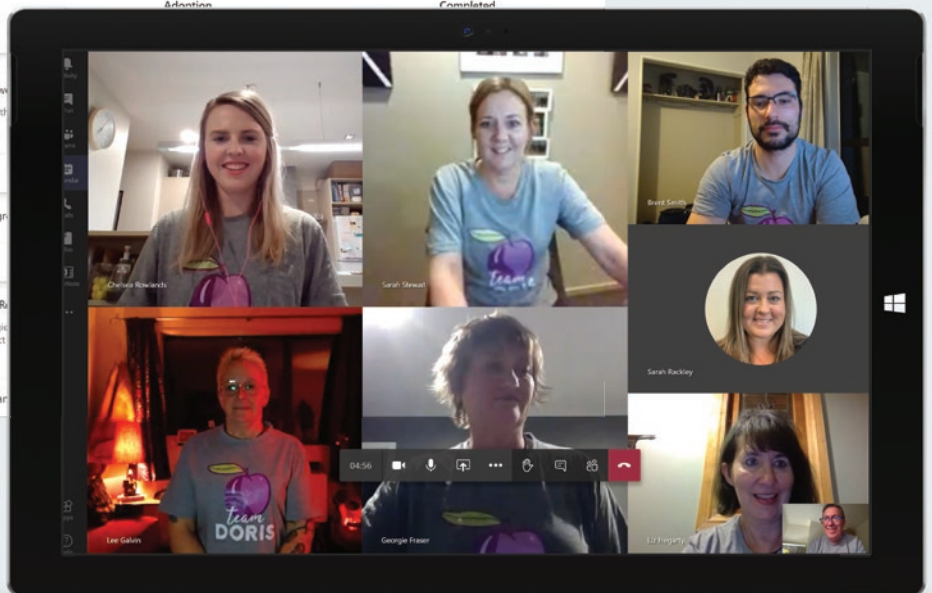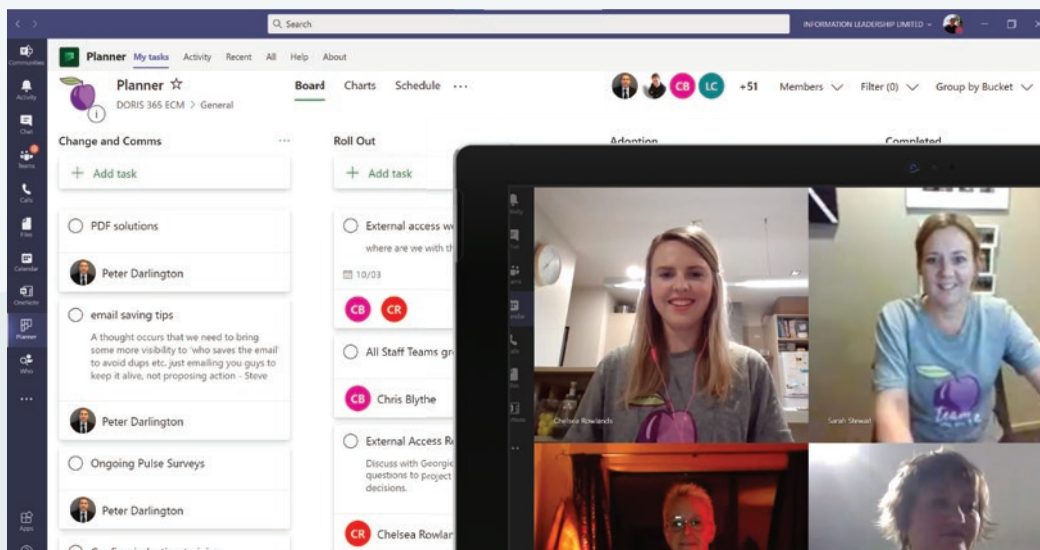
Teams for Town Hall:

First ever all-staff gatherings,+300 staff join...

"we could never do it physically before, we're spread across 7 offices and hours away from each other. It's awesome, the chat window is busy, and everybody's submitting questions, and we're saying hi to each other. It's a nice environment. Just a few people who were absolute gif monsters. So it's always quite funny!..."

- Liz Hegarty, Systems Analyst

Making employees aware of the power and ease of use of their new workspaces. Engaging them in the process for buy-in and growing their digital skills and confidence.

Staff Expo

Gain awareness on the why, gain feedback, increase participation and create momentum.

- Beth Catley, Change Management and Communication

Over 300 staff attended an Expo event: "We had a lot of buy-in from people who knew what we were doing now wasn't working. There was quite a lot of excitement, about the opportunity that moving to some modern tools gave us"

DORIS What's changing?

WHAT WILL BE THE SAME?

We will STILL be able to:
- Create and save documents.
- Create letters and templates in MagiQ.
- Access those documents from the MagiQ interface.
- Have a shared team document space.
- Link documents to other programmes.
- Identify public documents for the website.
- Make sensitive documents confidential.
- Automatically import AlphaOne documents.
- Everything you do in SilentOne, you will do in DORIS.

We STILL won't be able to:
- Access paper records digitally.

WHAT WILL BE DIFFERENT?

We will NOW be able to:
- View other people's team document spaces.
- Go back to old versions.
- Work on documents at the same time as others.
- Find documents easily through searching.
- Share documents between departments and contractors.

We NOW won't be able to:
- Have unrestricted ability to create new folders.
- Split records for one thing (like a consent) across MagiQ, network

TOP TIPS For awesome INFORMATION MANAGEMENT

- **Nearly everything is a record!** If in doubt, treat it as a record (and save it in DORIS).

- **Use DORIS.** Our policies and the Public Records Act require us to manage our info only in approved record-keeping systems - for most stuff, that's DORIS.

- **Think about what is being done, not who is doing it.** That will help you work out where in DORIS to save information – by function not department or team.

- **Our information is public.** There are usually only three reasons to keep information confidential - under LGOIMA, the Privacy Act and legal/commercial/financial sensitivity.

- **Information management is part of your job.** Doing it well starts with all of us.

- **Choose a meaningful name.** Think Who, What, Where, When and be consistent.

- **Teams chat is discoverable.** So are any chats, emails, text messages and social media posts from Council accounts or on Council business.

Change Management Workshop

For key stakeholders and staff expected to play leadership roles in the implementation and on to business as usual.

> "the workshop was really useful to introduce the concept of change management to a wider group of staff and get them thinking about how this type of project, wasn't just a system change, it was a way of working change and a behaviour change"

- Beth Catley, Change Management and Communication

Video Training modules

Delivered via Stream/SharePoint for lockdown and beyond.

DORIS Training Videos

Module 1	Module 2	Module 3	Module 4
Intranet Overview	DORIS features	Creating/Deleting Docs	Search
Module 5	Module 6	Module 7	Module 8
Views; Filtering; Sorting	Send/Move/Copy a Doc	Doc Properties & versions	Working Offline

DORIS Creating and Deleting Documents
320⏵ 1♡

Module 3 Creating and Deleting Documents
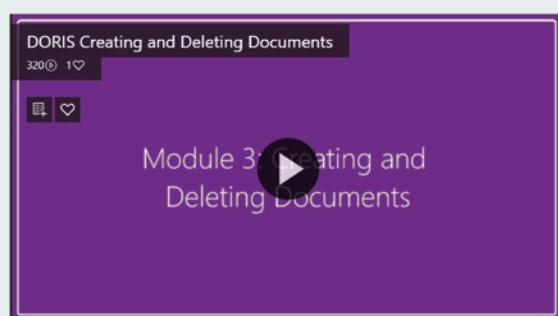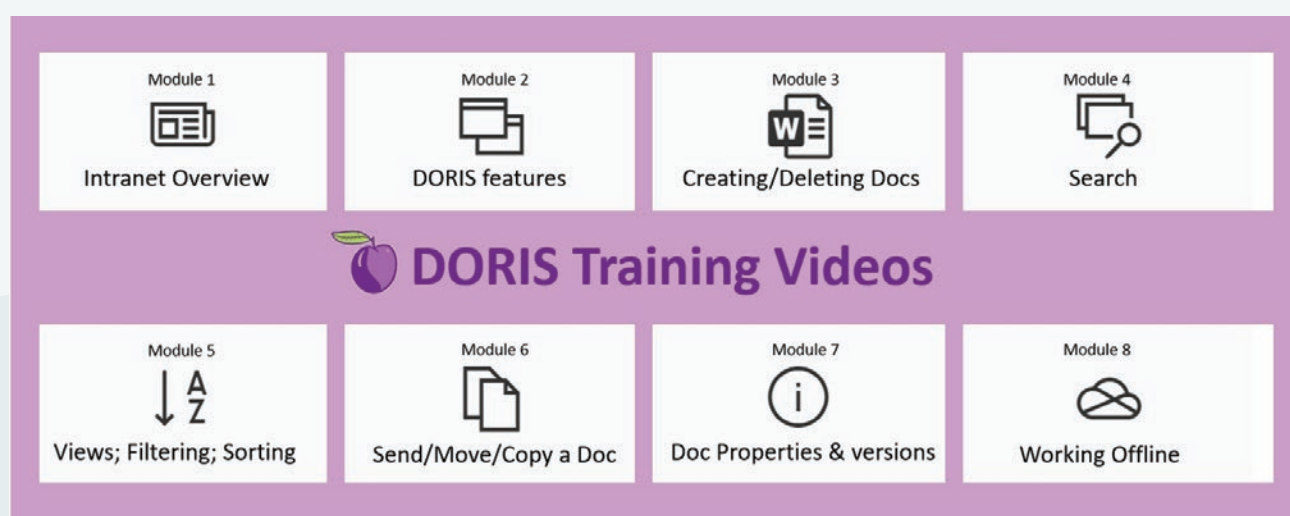
There are 10 training modules in total – the first five training modules have been accessed on average 600 times. A quiz is completed after completion of all modules to test knowledge.

- Janine Gillions, Branch Librarian Motueka Library

> "We can access the training when we need to on DORIS, and that's really cool because you are learning as you go"

Solution 4: Power Platform

DORIS

Business Analysts picking up Power Platform skills to solve real problems and allowing customers to visualise and understand community issues.

Example 1: Water Management

The Tasman region is heavily reliant on irrigation for its agricultural production. Power BI is used to provide an interactive map on the TDC website to help with water management and make it easier for residents to know if they are required to restrict water use.

> "Power BI just makes life so much better. The tools that let you create channels between the outside world and your internal systems is fantastic. I'm not writing code, I'm not opening ports, I'm just writing some rules and it happens. Plus the ease of interrogation, investigation and analytics is just fun, fun, fun."
>
> - Liz Hegarty, Systems Analyst
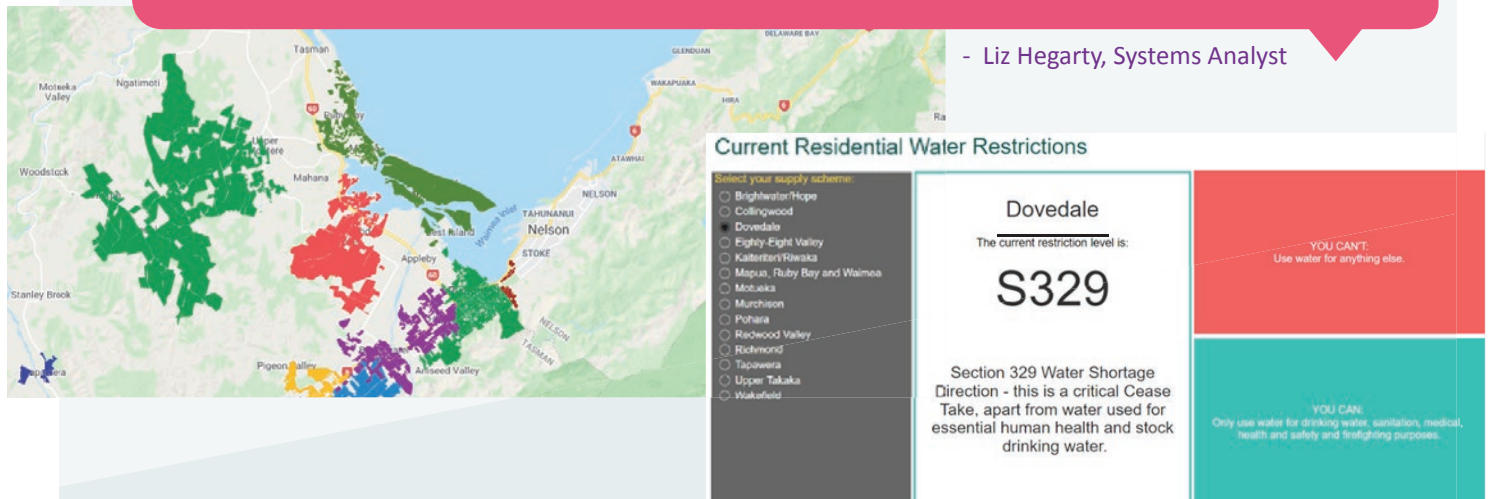
'S329' (pictured above) requires the most restrictive water use and is used during droughts. Residents were told what they could and couldn't use water for: red box above says "YOU CAN'T:…" and green box says "YOU CAN:…" – powered by Power BI.

Example 2 : Concerns from the community insights

An interactive map on the Tasman website shows what residents are most concerned about due to coastal erosion and sea-level rise. Through this, Power BI is providing greater transparency for Council consultation processes.
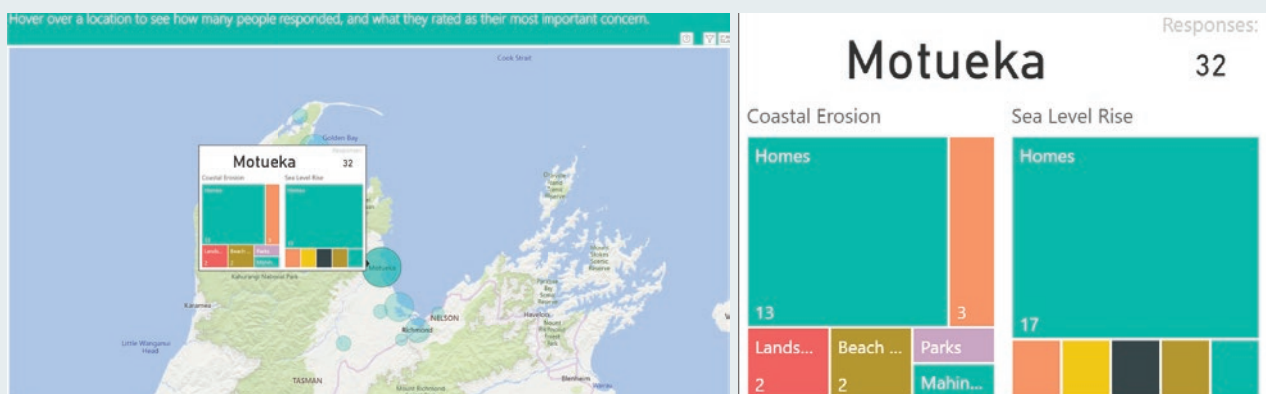
Example 3: In the field

Power Apps has made improvements possible for a range of TDC systems, especially when working in the field. Luke Chignall, Systems & Support Programme Leader recalls "we taught ourselves PowerApps using a book and the internet and built an app for Cemetery photos".

Budding genealogists can now access headstone photographs online. For staff, the app enabled them to select the cemetery they were visiting and the plot, point the device at the headstone and take a photo. At this point the user can sync the file directly to the genealogy database.

"The PowerApp was really a tool to catch up historical and missing photos. Also we could make the app available to the public if they clean up headstones and want to send us a new version."

- Luke Chignall, Systems & Support Programme Leader
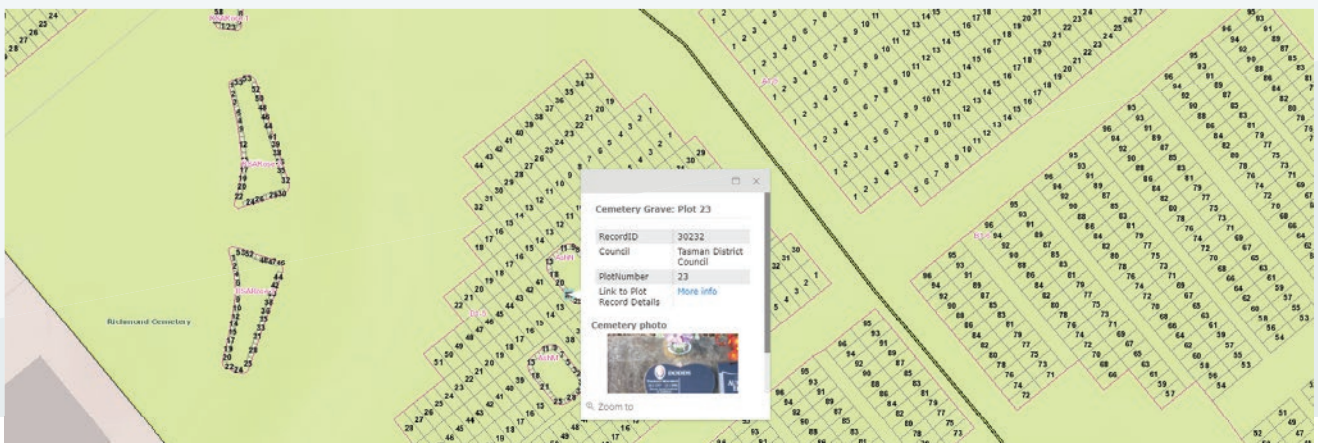
"We leapfrogged a decade, and a couple of decades worth of legacy large on-premise systems, to do something that will stay contemporary because of the way the Microsoft 365 environment is designed."

- Peter Darlington,
IS Manager

Information Leadership deliver modern digital workplaces on the Microsoft 365 platform that balance being easy and flexible to use while providing confidence and control that information is secure, complete and findable. Our iWorkplace Framework ensures we consistently deliver enterprise-grade modern workplaces for both commercial and public sector agencies, including meeting the demanding need for Public Records Act compliance.

An enduring and strong partnership with Microsoft is critical to helping our customers achieve more on Microsoft 365. Membership of the elite Content Services Program connects us to the product development team at Microsoft headquarters in USA, and recent wins at the NZ partner awards validate our world-leading solutions and practice.

With over 150+ New Zealand implementations since we started in 2010, this case study based on how we worked with Tasman District Council, is one of many Microsoft 365 implementations in the last 24 months.

Information Leadership is an authorised supplier of Cloud Transition Services and Information Management Services through the Department of Internal Affairs 'Market Place'.

"When it comes to moving an organisation, like Tasman, with **serious information management** and transparency needs it's hard to imagine working with an organisation who's more on top of it than Information Leadership...

The expertise they've got across their staff has been fantastic; the support we've had through the DORIS changeover - we **couldn't have asked for more**.

Between Kristy heading it up, available all hours, all times. We had Chelsea in person, and during lockdown remotely working with us here at Tasman, **we all became like one family**.

It's been fantastic because I don't think we'd have got across the line without that kind of **care and attention**.

We're extremely proud of what we've achieved with Information Leadership's **iWorkplace and the Microsoft 365** application suite through the Covid crisis this year."

- Peter Darlington, IS Manager, Tasman District Council

What our Customers Say

"We consider Information Leadership a true partner: we partner with organisations where it's a two-way street … We want the people we select as partners to be part of the team."

James Blair, **Todd Energy**
Head of Information
Management & Technology

"Thanks to the whole Information Leadership team for your help and support. We wouldn't have achieved anything like the outcome we have with anyone else but you guys. Truly awesome!"

Steve Manners,
Tasman District Council
Chief Information Officer

"Information Leadership has a consistent professional approach and consistent delivery of the product. We recognise it's a partnership and Information Leadership worked hard to enable us to continue to operate with the rapid roll-out of Teams due to Covid-19 – that was awesome!"
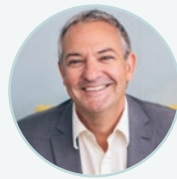
Jason Marris,
Kaipara District Council
GM Engagement and Transformation

"Working with Information Leadership was a great partnership – we were working together on a shared journey, not telling each other what to do. Responsiveness of the IL team is super fantastic… I respected the knowledge IL staff bought into the workspaces."

Naomi Aporo,
Wakatū Incorporation
Group Programme Manager

"We wanted something that went beyond just digital file storage. We wanted something that was going to be a catalyst for our digital journey so we could achieve our aspiration to think smarter, work better together and enable customer excellence. Office 365 has given us access to the workplace of the future, and access to the digital future."

Monique Davidson
Central Hawke's Bay
Chief Executive | Kaiwhakahaere

"What was truly invaluable was getting a solution that was pragmatic, practical and useable. There's nothing worse than coming up with something that just pays lip service - Information Leadership created a system that we could actually implement. The feedback from users is overwhelmingly positive."

Jason Simons,
Pan Pac
IT Manager

Co-creating Each Customer's Microsoft 365 Modern Workplace Future

Usually start with demos and presentations, then moving to scoping documents and roadmaps…

Start Engagement

What we cover

Types of solutions; customer stories

Show what good looks like

Assess business priorities and givens

Taking into account the customer's needs & situation

Decisions on path forward

Roadmap and tactics

Implement

Support and expand over time

Microsoft Partnership

New Zealands only Content Services Partner

Information Leadership is the only NZ Microsoft partner, and one of just 41 partners worldwide, to be Charter members of the elite Content Services Partner program. Microsoft selects partners in the Content Service program for their proven ability to "help customers succeed and achieve more with their content in Microsoft 365."

Microsoft
Content Services
Partner Program
Charter Member

"It's exciting to see Information Leadership become a Charter Member of our global Content Services Partner Program. We're seeing Microsoft customers increasingly move to modern approaches to enterprise content management. It's great to know that we have a world-leading content services partner able to assist them."

- Russell Craig, Microsoft New Zealand, National Technology Officer

Empowering Employees Partner of the Year

For the second year in a row, Information Leadership won 'Empowering Employees' at the Microsoft New Zealand Partner of the Year Awards for their work with Tasman District Council. Tasman's CIO and IS Manager, Steve Manners and Peter Darlington, joined the IL team at the awards ceremony to celebrate the shared success.

"the award recognises a partner that enabled their customers to work more collaboratively. The customer's specific needs of information management, governance, mobility and collaboration were focused on and it was impressive the way Microsoft 365, Teams and the Power Platform were used to innovate."

This whitepaper, published Jan 2021, documents an assessment by Informati on Leadership of the capability of Microsoft 365 to support organisations in meeting their obligations under the New Zealand Public Records Act 2005. Get Microsoft Whitepaper
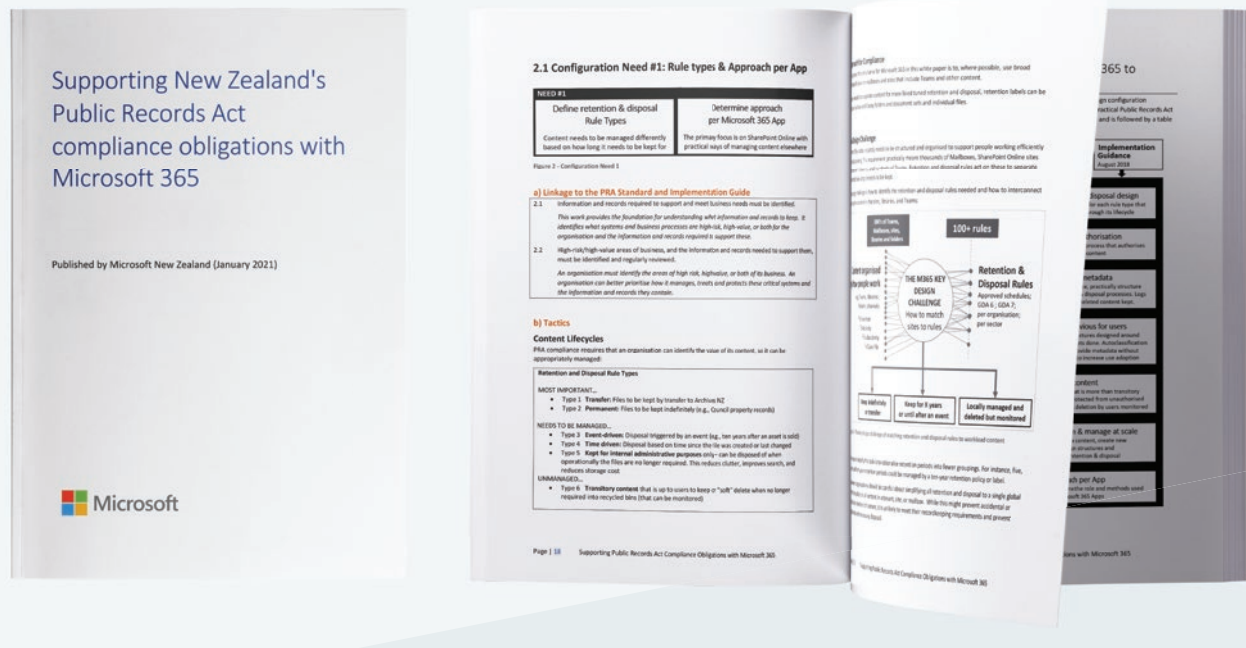
Proven Expertise

We're recognised for our proven expertise in compliance/record management, and implementation as Charter Content Services Partner.

Compliance/Records Management

Implementation

Case studies on Microsoft.com

Resources and assets to accelerate Microsoft 365 in your organisation are accessible online via Microsoft's Tech Community Resource centre. We're proud our case studies are featured including; Todd Energy, Pan Pac Forest, Forest and Bird, Kaipara, Central Hawkes Bay and Gisborne Councils.
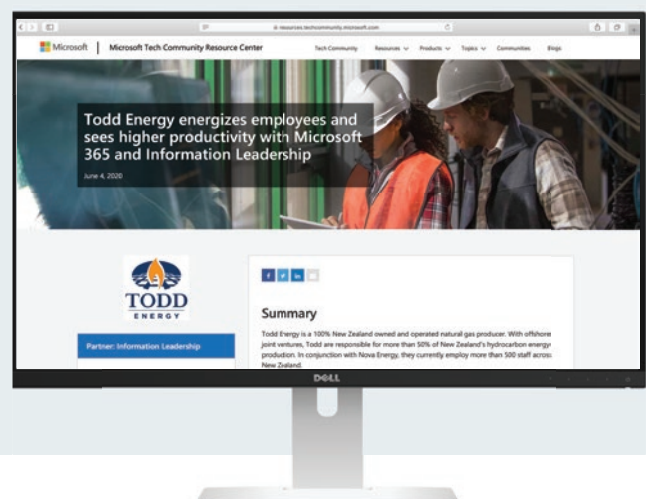
Workshops Information Management for Microsoft 365

110+ New Zealand public sector agencies that have attended our workshops since March 2020:

ACC | ASB Bank | Ashburton District Council | Auckland Transport | Bay of Plenty District Health Board | Bay of Plenty Regional Council | BOPLASS | Canterbury District Health Board | CCS Disability Action | Central Agencies | Shared Services | Central Hawkes Bay District Council | Central Otago District Council | Chorus | Christchurch City Council | Climate Change Commission | Commerce Commission | Creative NZ | Department of Conservation | Department of Internal Affairs | Eastern Institute of Technology | Education Review Office | Energy Efficiency and Conservation Authority | Environmental Protection Authority | Institute Of Environmental Science and Research | Far North District Council | Financial Markets Authority | Fire and Emergency NZ | Forest and Bird NZ | Gisborne District Council | GNS Science | Greater Wellington Regional Council | Hamilton City Council | Hawkes Bay Regional Council | Heritage NZ |Horizons Regional Council | Hutt City Council | International Accreditation NZ | IRD | Kaipara District Council | Kāpiti Coast District Council | Kawerau District Council | Kiwi Wealth | Kordia | Land Information NZ Wellington | Landcare Research | Law Commission | Leaderbrand | Manawatu District Council | Maritime NZ | Marlborough District Council | Massey University | Masterton District Council | Ministry for Culture and Heritage | Ministry for Primary Industries | Ministry for the Environment | Ministry of Business, Innovation and Employment | Ministry of Education | Ministry of Health | Ministry of Social Development | Museum of NZ Te Papa Tongarewa | Napier City Council | Nelson City Council | Ngā Taonga Sound and Vision | NMIT | Northland Regional Council | NZ Customs Service | NZ Film Commission | NZ Health Partnerships Ltd | NZ on Air | NZ Police | NZ Super | NZ Transport Agency | NZQA | Office of the Auditor General (OAG) | OSPRI NZ | Otago Polytechnic | Pan Pac Forest Products Ltd | Plant and Food Research Limited | PrimePort Timaru | Queenstown Lakes District Council | Rotorua Lakes Council | Scion | Selwyn District Council | Social Workers Registration Board | South Taranaki District Council | Southland District Council | Sport Waitākere | SportNZ | Takeovers Panel | Taupō District Council | Te Wānanga o Aotearoa | Te Wānanga o Raukawa | Teaching Council of Aotearoa NZ | Tertiary Education Commission | Todd Energy | Toi-ohomai Institute of Technology | Transpower NZ | Upper Hutt City Council | Victoria University | Waikato District Council | Waikato District Health Board | Waipa District Council | Wakatū Incorporation | Watercare Services | Wellington City Council | Wellington Water | Western Bay of Plenty Regional Council

25+ workshops, 110+ NZ agencies
240+ information managers, GM's, CIOs and solution architects

Interactive and online, our 2.5 hour information management for Microsoft 365 workshops received stellar reviews and feedback - with a Net Promoter Score of 9 out of 10.

9.0 ★
average rating

"Sarah and Grant ran a really well-structured, analytical and interactive workshop - **lots of information but it never felt dry or boring.**"

" **I liked your agility to adapt to lockdown.** The session was really good and practical overview of Office 365 and IM compliance."

"An absolutely brilliant workshop with stellar presentation by people who live & breathe their stuff. Thank you so much!"

"How you tied in the principals of IM into the function of **Teams.**"

"Addressed **specific issues with specific recommendations** and guidance. Was clear and informative"

"Considering we are on the verge of rolling out Teams in our environment, the knowledge that was shared today will come in handy when **we create a guideline for SharePoint and OneDrive** usage for end users."

"The mapping of everything back to the IM must haves, rather than an IT focus on technology"

"**Succinct and relevant content**. Presenters very experienced with the product; Impressive!"

"**Interaction** within a 'webinar' was very cool - well done!"

How useful was the workshop? 175+ attendees

VERY USEFUL ——————— USEFUL ——— OKAY

Engaging with Information Leadership

Feasibility and reviews

Where customers need to make a business case to get off legacy systems. This includes:

- Legacy EDRMS such as HP TRIM, Open Text, Objective
- All of Government ECM due to 2020 contract expiry date

New starts

Where customers have no current Enterprise Content Management System and want to embrace new modern ways of working, including Microsoft Teams.

Makeovers and restarts

Customers who have gotten off to an unstructured or poorly structured start with Office 365 and now have a mess and poor findability/usability.

Migration from on-premise

Where customers have significant SharePoint on-premise ECM and wish to move and embrace Microsoft Teams and the full Office 365 modern workplace. Our IP includes a 25 page whitepaper on strategy, tactics and a migration roadmap.

Read the whitepaper:
informationleadership.co.nz/go/whitepaper01

Contact us today

Free phone

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Email

simone@informationleadership.com

Web

informationleadership.com/contactus

let's make work better

INFORMATION
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