
Challenge

In its mission to transform public education across the nation, NewSchools Venture Fund is making some strategic investments in itself. The nonprofit venture philanthropy firm recently decided to replace its outdated content management system with Office 365. The goal? To apply the right Office 365 capabilities that will allow NewSchools to optimize and align key processes among its four investment teams; improve collaboration across the entire organization; and build a powerful, centralized knowledge repository.

Putting business needs first

We started by putting the technology aside and instead examined our client's needs from a business point of view. We dug deep to understand how their four investment teams spend their time. What is each team's working style? How do the teams work together—and across the organization? Where are the gaps and pain points in their current processes? We then designed optimized business processes that align with the desired collaborative work style.

Only after we had an understanding and assessment of our client's business needs did we evaluate the technology solution. We mapped Office 365's capabilities to each business need. Some components, such as Yammer, did not match the teams' work styles. Others, such as Groups, were not rich enough in features (yet). We ultimately identified SharePoint and OneDrive as the Office 365 tools that would best achieve the firm's goals.

We quickly built a prototype tool in SharePoint and launched it as a pilot, showing teams how it worked and putting it to the test in their real world,

tweaking, monitoring and making enhancements until users gave an enthusiastic thumbs-up.

We took a holistic approach to change management that has led to high user adoption: In addition to training users and providing feedback tools, we identified business champions to serve as voices for change and we encouraged leaders to lead by example.

Moving faster on a mission

With its new central knowledge repository and collaborative work processes, NewSchools is seeing leaps forward in communicating among teams and reporting across the entire organization.

"What's great about Point B is that they really understood the business context we are working with here," said Jessica Henry, manager at NewSchools. "That is huge for us. It has resulted in an outcome that allows us to move much faster. The ease of working with them and their accessibility have also made this one of the best vendor working relationships I've ever experienced; it's been enjoyable and seamless."