



# DreamTeam Portal 2.0 case study

## Portal solution connects 2,500 financial advisors



Based throughout the United Kingdom and with a stand-alone, multi-tiered distribution network of 2,500 financial advisors, Openwork is a network of over 780 financial advice firms backed by the worldwide Zurich group.

Openwork is committed to making it easier to buy and sell complex products and services. In order to manage its communication and data management processes, Openwork recognised that it needed a complete back-end architecture and easy-to-use portal application to underpin the entire sales process and provide advisors, customers and managers with access to all core services and key information.

According to Daniel Teague, Chief Technical Architect at Openwork, applications within the portal needed to be scalable, always available, easy to maintain and have a high level of user functionality.

After evaluating a number of solutions, Openwork decided to deploy Microsoft Office SharePoint Portal



Server 2003, running alongside Microsoft BizTalk Server 2004 and Microsoft SQL Server™ 2000.

**“The Electronic Mortgage Header application, built using SharePoint Portal Server technology, has paved the way for further application of the technology.”**

Daniel Teague  
Chief Technical Architect, Openwork

Openwork needed a complete back-end architecture and easy-to-use portal application to underpin the entire sales process and provide advisors, customers and managers with access to all core services and key information. Recognising the complexity of the project, Microsoft called on ICS Solutions.

Throughout the project, Openwork saw ICS Solutions as its partner of choice and placed great emphasis on ICS Solutions' specialist knowledge of, and experience with Microsoft technologies. ICS Solutions deployed a plethora of consultants on the project and provided well over 2,000 man hours of specialist Microsoft expertise. With such a high level of understanding of Openwork's business and technical challenges, ICS Solutions installed a best practice implementation framework to support corporate and IT governance and oversaw the transition from a systems based to a service based ethos.

The Openwork portal is now the main point of access for some 2,500 financial advisors and 350 support centre employees. Advisors can log onto the web site and access accurate documentation provided and maintained by the internal communications team. A secure messaging system also helps advisors and product providers exchange new business and client information.

## BENEFITS

- Access to a fully certified and trained team of Microsoft specialists.
- Ability to meet new demands.
- Flexible resourcing model.
- Trusted external delivery capabilities in new technology areas.
- Reduced reliance upon traditional contract markets.
- Access to specialist, less frequently used disciplines.
- Close relationship with harmonised working practices.
- Supports Openwork's strategic objectives.
- Leverages proven technologies enhanced to meet exact requirements.
- Scalable solution addresses business requirements.
- Enables greater communication with 2,500 advisors – up to date information viewed through a unified Portal.
- Increased efficiencies and reduced man hours and management overheads.
- Removal of manual process and transition to paperless environment.
- Management information reporting.
- Improved perception of Zurich Openwork by network of advisors.