



# CASE STUDY

Transforming Halifax Regional  
Municipality through ECRM 365

## SOLUTION SUMMARY

Halifax Regional Municipality is the provincial capital of Nova Scotia and a major business center in the region. Halifax required an ECRM solution to seamlessly integrate records management with content collaboration to better serve its citizens. The IQ Business Group Inc (IQBG), together with its partners, leveraged Office 365, SharePoint Online, ECRM 365 and Microsoft Cloud Identity to provide a deeply integrated solution for protecting information, controlling its distribution and delivering compliance and collaboration without compromising security or relying on additional 3rd party software.



### WORKLOADS

Migration

Advisory

Implementation

Digital Implementation

Knowledge Management



### WORKSTREAMS

Onedrive

SharePoint

O365 Compliance Centre

O365 Security Centre



### SERVICES

Harvest

Create

Collaborate

Protect

## CHALLENGE

As a provider of public services Halifax was faced with the following challenges:

- Content sprawl
- Untracked content growth
- Information leaks
- Low compliance
- Ineffective governance
- Identity and access risks
- Friction between records management and content collaboration processes

## SOLUTION STRATEGY

To tackle the challenges faced by Halifax, IQBG performed a high-level assessment of the client's workforce, business scenarios, environments and information landscape to transform Halifax's environment into a cohesive Microsoft 365 ecosystem. Following this IQBG conducted planning which involves producing a Blueprint and a Roadmap for Transformation.

The next step of the process comprised Transformation which entails the implementation of changes to transform the organization followed by the measurement of compliance and secure scores and remediation thereof.

In order to affect a cultural shift within the organization, a formal change management and adoption campaign was required. Once this was completed IQBG ensured continuous monitoring, remediation and alignment to ensure that Halifax achieves its objectives.





## IQBG'S ECRM PROCESS:



### MICROSOFT 365

The Microsoft 365 ecosystem incorporated records schedules and taxonomies, retention rules and workflows, interactive collaboration spaces where content can be created, and mechanisms to enable transparent versioning and secure external sharing.

Following the implementation and activation of the ECRM 365 environment, Halifax is reaping the benefits of next-generation collaboration and seamlessly integrating collaboration efforts with records management.

#### The ECRM solution implemented embraces:

- A holistic approach to managing the entire lifecycle of document creation, sharing, consumption, reuse, knowledge, and records management, archiving, and disposal. Content Services covers the entire spectrum of a document's lifespan. We call this content velocity - as content moves through an organization, it gains value as it accelerates information discovery.
- A people-centric content solution - allowing for personal and organizational management (knowledge, retention, records, and information lifecycle management).
- State-of-the art policy and security with content protected at all phases of the lifecycle.

### RESULTS

#### This solution enabled Halifax to:

- Develop an organization-wide information architecture design
- Manage content creation with co-authoring, versioning approvals, publishing, and structured, easily searchable metadata taxonomies
- Provide faster and more confident access to needed information
- Support higher service levels including self-service applications to municipal constituents
- Implement measured, continued compliance with global standards
- Link records retention schedules to business content, raising compliance and reducing risk and liability for the municipality
- Collaborate both internally and externally