Modern Workplace
Fundamentals

Jump start your Microsoft 365 adoption and productivity

MW Fundamentals is a best-practice framework of connected SharePoint sites with pre-built libraries, lists and security permissions. The sites cover the information needs of most businesses and create a ready-to-use Microsoft 365 environment to help fast track migration and adoption.

Fast track modern cloud adoption

MW Fundamentals enables your people and your organisation to quickly and easily adopt the latest technology and modern ways of working.

It is quick to install and can be adapted and extended to fit your own organisation's structure. MW Fundamentals has also been architected to be "Teams Ready" to help support your use and adoption of Microsoft Teams.

One place for everything, and everything in one place

Manage all of your important documents and business information in one easy-to-use application, fully integrated with your Office apps, your email, and your Microsoft 365 user security.
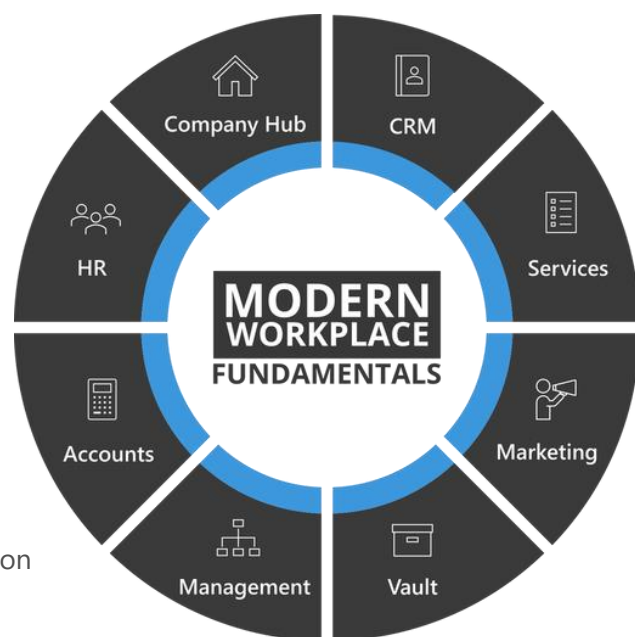
Company Hub
A central hub to access company information and your important policies and procedures.

CRM
Access and manage all your sales information and details of your prospects and clients.

Management
A secure site for your management and company secretarial functions.

Marketing
Brings all your marketing assets and other marketing information into one place.

Human Resources
A secure site to store and manage all your HR information, including sensitive information on staff.

Services
Access and manage all your client service information, information relating to client projects.

Accounts
A secure site for managing accounts documents and other finance related information.

Vault
Designed to store your archive information, so it is secure but always available if needed.

Modern Workplace Fundamentals sites, libraries and features

🏠 Company Hub

The **Company Hub** site is a central communication and resource hub that is accessible to everyone in your organisation, providing them with easy access to your important policies and procedures and other company information, such as news and announcements.

It comes with a dedicated library for your published **Policies and Procedures**, which you can also pin to the site's landing page. It can also be easily extended into a complete company **intranet**, with announcements, social media updates, external links and more.

The Company Hub also features powerful **news** creation and publication capabilities so you can easily make important information available to everyone in your organisation.

👥 Human Resources

The **Human Resources** site provides a single location for your HR information so you can keep track of all your employee records, **policies**, benefits and other HR documents in one place. It is only accessible to authorised users and is compliance with data privacy regulations like GDPR.

The site includes dedicated libraries for **Training** materials and for **Employment Records**, which you can optionally share securely with individual staff members to give them access to their own records. There is also a pre-configured **Staff List** to make it easy for you to maintain details about all of your people.

CRM

The **CRM** site brings all your sales, business development and client agreement documents together into a single central location. It comes with a dedicated **Sales Library** for sales proposals, pitch documents and other information you use or create during the sales process, and a **Legal Library** for your client and supplier contracts and agreements (this can optionally be connected to the DocuSign e-signature service). There is also a pre-configured **Organisation List** for your client and prospect contact information.

The site can be restricted to users who focus on sales or pre-sales activities (rather than client projects or client service delivery).

The CRM site can be **upgraded** into a full CRM solution by adding the Sales Manager and Contact Manager apps.

Services

The **Services** site is focused on client delivery, providing a single location for organising and tracking your **client project** and client service information. It has a dedicated library for **Client Service** information and access to the site can be restricted to users who focus on client projects or the delivery of client services (rather than sales or pre-sales activities).

The Services site can be **upgraded** into a full project and service management solution by adding the Service Manager, Time Recorder and Snag Recorder apps.

Modern Workplace Fundamentals sites, libraries and features

Management

The **Management** site is a dedicated information hub for **senior management** and company secretaries to manage their important information securely and to track key reporting, filing and ad-hoc management and corporate activities.

The site includes a library for your **Company Secretarial** information as well as general management documents, and also features a **Corporate Events Calendar** so you can easily and securely maintain central records of all your important corporate activity, such as company reporting dates and returns.

A **robust permission model** ensures that access is tightly controlled at all times.

Accounts

The **Accounts** site is a secure and restricted area for creating and managing information that is owned by the **Accounts Team**. The site comes pre-built with dedicated accounts information stores to help you track **Purchase Invoices**, **Sales Invoices** and **Expense Claims**.

There is also a pre-configured list for managing **Finance Contacts**, such as clients and suppliers, that can then be referenced by other information such as purchase invoices.

Marketing

The **Marketing** site provides a dedicated set of information stores for all marketing related activity, including **a Marketing Assets** library and a dedicated **Picture library** for images and logos. All your marketing information stored and managed in one place, and easily accessible.

Vault

Every site within MW Fundamentals includes an **Archive** library where you can safely store information that relates to the site's function and users.

For example, you may have legacy HR information that you need to keep, but you may no longer need access to it on a day to day basis. This information belongs in the HR site Archive library, so it is available to site users if they do need it, but is also protected by the access permissions set up on the HR site.

The **Vault** site is designed for legacy information that does not belong in any of the Fundamentals site Archive libraries. Archived information is safe in the Vault and is searchable, so if you do need it, you can easily find and then move or copy what you need into one of the other Fundamentals sites.

Adoption In A Box

Adoption In A Box is a unique package of technology, training and best-practice know-how that will fast track your Microsoft 365 migration and adoption. It is based on the deployment of MW Fundamentals and, through a simple 5 step process, gives you the start you need to successfully adopt new and better ways of working.

Contact us now to find out more about Modern Workplace Fundamentals