



In 1706 Twinnings first started selling fine teas in England. Today they are an international organisation selling more than 200 teas in more than 100 countries throughout the World.



New Product Development with Microsoft SharePoint

Background

Deltascheme has been a supplier to Twinnings for over 10 years and was initially responsible for the implementation of a document management system from IBM (FileNet Content Services) with the Kofax scanning software to capture and manage the storage of HR and Finance related documents within the business.

Working with Deltascheme as their Microsoft Implementation Partner, Twinnings have now implemented Microsoft Office SharePoint Server as their corporate Intranet and document management system. K2 blackpearl has been used to deliver a tightly integrated solution for managing the organisations' business processes around content and forms within SharePoint, including case related activities such as New Product Development.

Deltascheme has now migrated the content held in the FileNet Content Services system to SharePoint Server 2007. All new content is now scanned, using Kofax Capture, into SharePoint.

New Product Development


The New Product Development (NPD) solution provided by Deltascheme has been implemented by the International Marketing Department of Twinnings to manage the logging, review and approval of all new product development requests across the organisation globally. The solution has been delivered in SharePoint using the K2 blackpearl case and workflow management software.

Summary of the Business Requirements

Twinnings is committed to delivering excellence in all its marketing initiatives and maintaining high levels of innovation around New Product Development. Cost effective successful innovation in New Product Development requires the use of a dynamic business tool to achieve effective planning, the enforcement of pre-defined standard procedures around each request, the management and automation of business processes and access to reporting on the status and activity for each request.

The NPD system that was previously in place was not able to effectively meet the requirements of a dynamic and large international manufacturing organisation that had many different markets each with their own local requirements.



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Deltascheme Case Study



“Deltascheme has been pivotal, working in partnership with us to develop, test and implement our new improved online Gate Process on SharePoint 2007. Their employees’ technical expertise was second to none, they were highly professional and dedicated in developing our new web site solution, which we believe sets Twinings Ovaltine at the forefront of online Gate Process management”

Joanne Bradley
International NPD Project
Manager
Twinings Ltd



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As a result of not having an effective corporate solution for NPD the International Marketing Department were regularly experiencing issues such as:

- There was **no audit trail** for approval checking
- A **lack of certainty** about product approvals and rigour in their design
- **Replication of documentation** in emails leading to loss of control of originals
- A significant **management overhead** to control the NPD processes
- Multiple **variations of the same documents** starting to being used

Deltascheme was asked to design and implement a new system that would be easy to use and capable of effectively managing all of the NPD processes across the business, globally.

Solution Implemented

The solution Deltascheme delivered was implemented in Microsoft Office SharePoint Server 2007 and used a number of web forms to capture each NPD application. Each application was then managed by the K2 workflow software to ensure that the correct business processes were adhered to (based on the type of NPD application), that the right staff were engaged in the review and approval process and that each application was completed within an appropriate period of time. SharePoint was also used to manage the storage and versioning of all the NPD related documentation (e.g. packaging, emails and artwork, etc.).

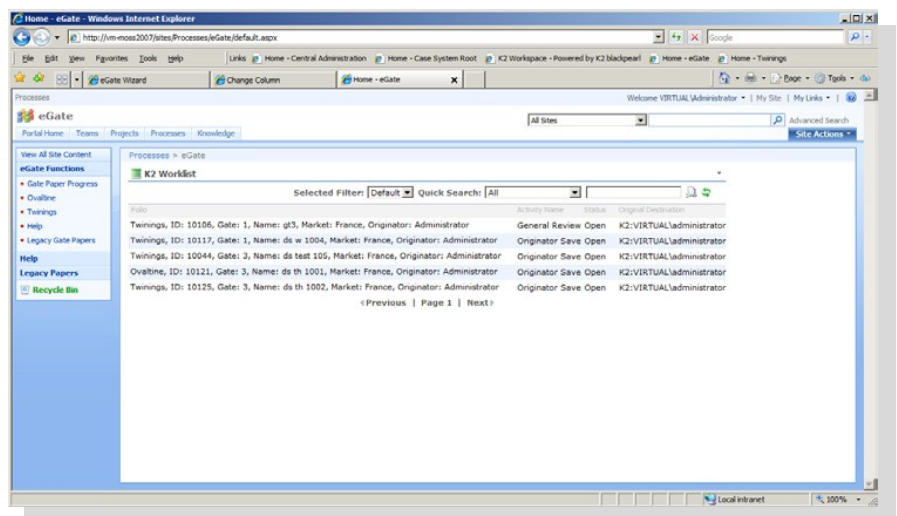


Figure 1 – K2 Task List with Gate Papers waiting processing

The NPD process typically starts when a market originator submits a proposal (Gate Paper) for local review amongst a number of departments (e.g. Finance, Marketing, Sales and Logistics etc.). The Departmental reviewers are different for each market (i.e. country). Once accepted by the local reviewers the Gate Paper then goes to the International Marketing Department for review and approval. All accepted Gate Papers are subsequently reviewed in a Priority Meeting (comprising of each supply chain function) and then either approved or recycled for further clarification.



Deltascheme Case Study

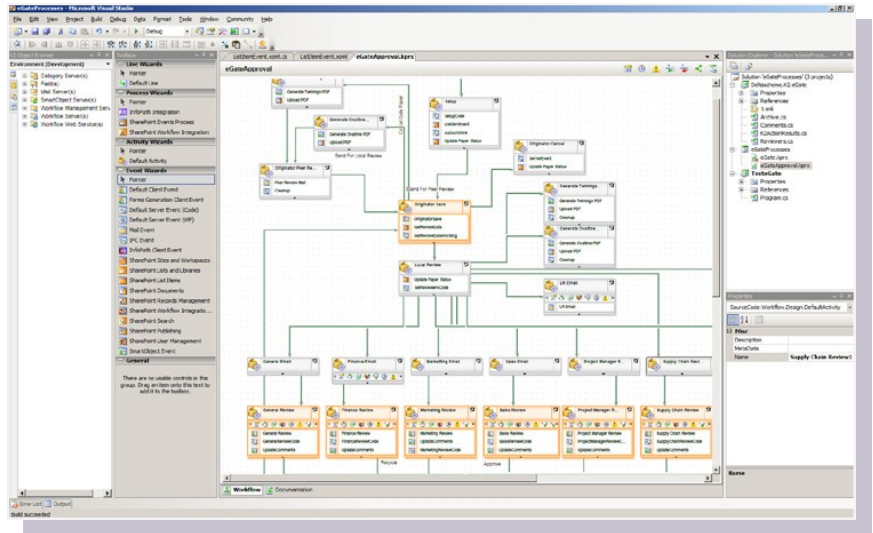


Figure 2 – K2 Designer for Visual Studio showing the process flow diagram for the system

The New Product Development solution has a number of Gates depending on the type of proposal (e.g. Gate 1 is a new concept idea, Gate 3 defines exactly what the project will be and how much it will cost, etc.). The information requested at each Gate varies and the information filled in at previous gates is pulled through to subsequent Gates to avoid duplication and the need to re-key information.

Project Name	clive walker
Project Id	10128
Gate Number	1
Initiator / Project Manager	VIRTUAL Administrator
Project Sponsor	
ReviewDate	
Business Unit *	France
Markets Involved *	
Target In Market Date *	
Shipment: From Manufacturing Site	
Shipment: From Andover	
Available to Purchase	

Figure 3 – Form used for collecting the description of a Gate Paper

K2 blackpearl and the web forms are fully integrated into SharePoint so all the associated documents, email attachments and discussion threads can be stored with the NPD application. K2 blackpearl is also used to escalate any tasks that are taking longer than they should do and can provide alerts and updates to the originator on the status and progress of their NPD application.

Deltascheme Case Study

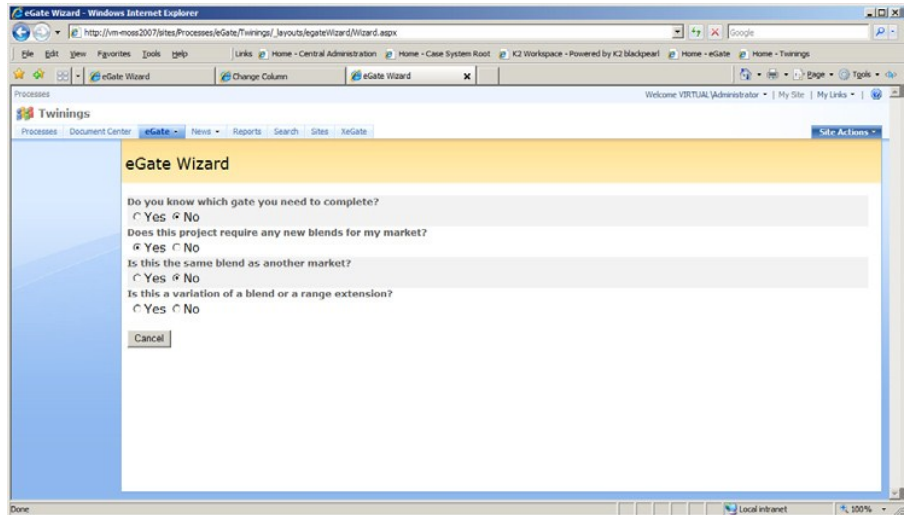


Figure 4 – Gate Originators work through wizards which decide the route the application will go

Benefits Derived from the NPD Solution

The major benefit provided by the SharePoint based New Product Development system is the speed with which new product requests can be logged, reviewed, tracked, approved and then taken to market. The legacy system the solution replaced was too cumbersome and not easily capable of the performance, security and reliability offered by the new system. Additionally, the complexity of the process has been reduced, such as:

- There are less forms and text fields to fill out and read
- A single portal provides a view of the attachments, discussions and progress of each NPD application.
- Since the solution is based on SharePoint the same platform can be used for the whole life-cycle of the project and not just the NPD element
- The system is simple and intuitive for staff to use and provides a common Microsoft centric interface
- Management of the NPD process has become significantly easier saving large amounts of time and effort



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Deltascheme Case Study



As a Microsoft Certified Gold Partner, Deltascheme can help you to implement your Microsoft Office SharePoint Server 2007 Enterprise Content Management system by providing:

- **Consultancy** to define your business requirements
- **Professional Services** to design, install and configure your system
- **Data migration tools** to re-classify and import your legacy content
- Solutions to enable paper **content to be scanned into the system**
- Services to deliver standard **forms and workflow processes**
- Expertise to **integrate SharePoint** with your existing applications

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Deltascheme is a leading provider of business and technical consultancy for Electronic Content Management and Business Process Management solutions based on Microsoft technologies.

Established in 1986, Deltascheme have consistently delivered best-of-breed technologies and proven solutions in answer to the growing business needs of their customers.

Consultancy Services

Before implementing any Enterprise Content Management system it is imperative that the business requirements of an organisation are fully defined and agreed. Deltascheme can help you to undertake an information audit to ascertain what documents are being created, stored and managed by your organisation and the relationship that exists between them. From this audit we will then be able to work with you to create a corporate file structure which will ultimately define the system architecture, i.e. the sites, folder hierarchy, etc. This exercise will include recording information such as document types, metadata structures, retention rules, searches, security models and user roles.

Software Installation and Configuration

Once the structure, security model and 'look & feel' of SharePoint has been agreed, Deltascheme can then assist with the sizing, installation and configuration of the system before user acceptance testing can commence.

Data Migration

One of the largest issues facing any organisation when implementing an Enterprise Content Management system is what to do with the existing data. Deltascheme can provide a range of tools and services to help organisations import documents held on network drives or legacy document management systems without the need to manually categorise and import each document. The software tools use pre-

configured rules (and where appropriate IPSVs) to automatically define and then classify documents before uploading them into SharePoint.

Paper Document Capture

Should you require to capture and store images of paper documents such as correspondence, forms, invoices, etc. into SharePoint, we recommend the Kofax suite of software products which support most scanners and provides ad-hoc scanning, batch scanning, forms processing (structured) and unstructured data capture such as the processing of supplier invoices.

Application Development and Configuration

Having implemented SharePoint as the document repository, Deltascheme can help you to start automating many of your standard business processes such as corporate forms (holiday requests etc.), and more complex processes, like purchase order requisition and invoice approval. In addition we can work with you to build specific line-of-business applications through SharePoint such as grants administration, correspondence handling, complaints management, Freedom of Information handling, project management, procurement management, contact management and case management.

Systems Integration and Business Intelligence

To deliver effective and efficient Enterprise Content Management systems there is often a requirement to provide levels of integration between SharePoint and other line-of-business applications, such as CRM, ERP, Pensions and HR to automate document indexing, provide data exchange or to deliver solutions for Business Intelligence. Deltascheme is experienced in delivering systems integration using industry standard interfaces or EAI tools such as Microsoft BizTalk.

