

## Case Study: Edelman



### Overview

**Country:** United States

**Industry:** Media & Entertainment

#### Customer Profile

Edelman is the world's largest independent public relations firm, with 3,200 employees in 51 offices worldwide. It was named "Agency of the Year" in 2009 by PRWeek.

#### Business Situation

Edelman had a corporate intranet, but users were not very happy with it and often required help from IT to update individual Web pages. Edelman wanted to revamp its intranet and make it easier to use and more engaging for employees.

#### Solution

Edelman used Microsoft Office SharePoint Server 2007 to build a new worldwide intranet named *Fusion*.

#### Benefits

- Easy to use
- Powerful and responsive
- Easy to integrate with other corporate systems
- Reduces calls to IT for support
- Extensible to support external clients

Edelman Links 3,200 Employees, 50 Million Documents, a Bowling Interest Group, and More

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— David Rosenberg, Lead SharePoint Developer, Edelman

The ASP-based intranet at PR giant Edelman was aging, difficult to update, and less flexible than users wanted. Edelman wanted to build a new intranet to meet its evolving corporate needs. It wanted an intranet that would integrate information from different corporate systems, enable employees to easily find other employees and corporate assets, and make it possible for individuals and practices to quickly and simply update and modify their own intranet Web pages. With more than 50 million documents to index and more than 3,200 users who were unaccustomed to being able to make changes to their home pages themselves, Edelman needed an intranet solution that was both very powerful and very user friendly. It chose Microsoft® Office SharePoint® Server 2007.



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## Situation

If the year had been 2004, the intranet at Edelman—named *Infusion*—would have been considered cutting edge. But by 2008, that was no longer the case. While each of the PR giant’s practice groups had their own ASP-based Web pages on Infusion, the pages had been constructed as relatively static dashboards. It was not easy for specific groups or practices to individualize these pages without support from the Edelman IT organization—so the IT organization found itself busy supporting change requests, which left less time to develop new tools and technologies for the organization at large.

Individual users at Edelman faced similar challenges. Infusion included services that enabled employees to search a database to find contact information for other employees, but its search capabilities were limited and often gave false hits, due to the lack of updated information. Moreover, employees could not extend the information presented in Infusion to include personal details or interests. In an age where social networking tools such as Facebook and MySpace were becoming commonplace, employees expected to be able to search for more than just phone numbers and addresses.

By 2008, the Edelman IT organization knew that it needed to oversee a bold evolution of its corporate intranet. IT wanted to build a new intranet that all users, both at individual employee and global practice levels, could handle easily and update themselves, and that would accommodate live news feeds and other dynamic content. It wanted an intranet that could share information easily with other corporate systems and that people throughout the enterprise could use to tap into the knowledge of the enterprise—whether that knowledge resided in one of

the millions of documents in the corporate archives or within the head of an employee working halfway around the world. And, it also wanted to build an intranet that employees would once again *want* to use.

## Solution

The IT group at Edelman knew exactly what it needed to accomplish its goals: Microsoft Office SharePoint Server 2007 (Office SharePoint Server). Designed to facilitate collaboration and content management, to streamline business processes, and to enable easy access to information from a wide variety of sources, Office SharePoint Server was a natural fit. Its extensive search capabilities would give employees easy access to corporate resources—both human and data—and its ease of customization would enable users and practices to create the intranet pages they wanted to create without having to contact the IT team to make changes.

### Connecting Corporate Resources

Edelman began developing its new Office SharePoint Server-based intranet—called *Fusion*—in 2008. Today, it runs in a virtualized environment on a cluster of HP ProLiant servers running the Microsoft Windows Server® 2008 operating system with Microsoft Hyper-V®. The intranet interacts with a cluster of physical servers running Microsoft SQL Server® 2008. These systems all interact with other servers in the data center and local offices running Active Directory®, the directory services component of the Windows Server operating system.

For Edelman, this link between Office SharePoint Server and Active Directory is a crucial part of the success of Fusion. Not only does Active Directory support a single sign-on model for intranet access, but Active Directory acts as a focal point for

information coming from other information sources within the enterprise. For example, the Human Resources system at Edelman, which runs on software from PeopleSoft, pushes information about employees—everything from phone numbers and addresses to managers' names and practice affiliations—into Active Directory. Then, on a regular basis, Office SharePoint Server copies this employee information from Active Directory so that it can maintain an up-to-date contact list for everyone in the enterprise. Employees using Fusion can search this index to find another employee's phone number, for instance, or another employee's manager's name, practice affiliation and so on.

### **Intranet Social Networking**

But the Edelman IT organization wanted Fusion to be able to provide more than just the bare bones information that Infusion had provided before—even if the information in Fusion was more accurate and up-to-date because of the integration with Active Directory. So, in building Fusion, Edelman developers made it possible for individuals to extend the information pulled from HR with much more personal information that they could provide and maintain on their own.

"We developed Fusion with the idea that each employee's home page in would be their My Site page on Office SharePoint Server," explains David Rosenberg, Lead SharePoint Developer at Edelman. "Instead of having a corporate page as the home page, each person's home page is personalized. There's some corporate content on the right hand side of the page but there are other portions of the page that each person can customize to meet their own needs.

"Using the My Details portion of the My Site page," Rosenberg continues, "employees can update their pictures, their skill sets, their interests, the status of projects they're

working on, and so forth. Today, they can go in and identify what projects they've worked on in the past and what clients they've worked with—but in the future we'll be adding that information automatically by linking into other systems in the corporation."

All this information becomes part of the searchable index in Fusion. If an employee wants to know which other employees have worked with particular clients, or who ride a particular train line, or who have an interest in bowling, the enterprise search features of Office SharePoint Server will quickly deliver the answer—complete with photos of the employees, their contact information, and many of the particulars they've chosen to share.

Edelman has taken the personalization of My Site and My Details even further by integrating NewsGator Social Sites™ into its intranet. NewsGator Social Sites has added rich features for cross-organizational collaboration, discussion, and networking. Employees can easily integrate NewsGator RSS feeds and Web parts into their My Site pages, so they can follow the updates of their friends and co-workers, whether they're writing about a current project or an upcoming social event.

### **Expanding Enterprise Knowledge**

When Edelman built its first intranet, the majority of the company's intellectual property—its case studies, research, proposals, new business efforts, and the like—already resided in file servers situated in various locations around the world. This information was moved into knowledge silos on the old intranet. With Fusion, Edelman is expanding this accessibility by integrating SharePoint discussions and metadata capabilities with existing and new files, allowing for more than just document

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data to be captured. Moreover, Office SharePoint Server maintains an index of all the documents within those libraries—more than 50 million documents to date—and refreshes that index on a daily basis. Employees searching for information in the corporate knowledge store can quickly and easily find it from a search box on their home screen.

## Benefits

For Edelman, this evolved enterprise intranet—call it Intranet 2.0—has delivered significant benefits. Office SharePoint Server has made it easier for employees and practices to find and publish the information they want. Fusion has reduced the amount of time and effort that the IT department has to spend maintaining the intranet. It has even made it easier for Edelman to create customized extranet sites for clients.

### Benefits for Employees and Practices

The employee search capabilities of Fusion deliver real benefits to employees. They can efficiently find the people and resources they need within the enterprise—and they do not even have to know who they're looking for to find that person. Today, employees can search for information by practice, skill set, prior client affiliation, social media competency, and much more. The search results come back in seconds or faster, facilitating the creation of rapid connections throughout the enterprise.

They can also individualize their pages quickly and easily.

“That the individual practices at Edelman can maintain their own RSS feeds on the intranet is very important to them” says Jim Markowich, Senior Vice President of Corporate IT at Edelman. “In the IT group, we're not PR professionals and we can't

keep an eye on news feeds the same way the people in our practices do. So, the health practice at Edelman wanted to keep a close eye on references to the H1N1 (swine) flu in the news feeds, for example, and the fact that they can tune their RSS feeds themselves to look for that has been a great benefit to them. It puts them in charge. When they decide that swine flu is not what they want to see at the top of the news, they can readjust their RSS feeds themselves.”

Other aspects of Fusion are equally groundbreaking for Edelman employees. Edelman University instructors, for example, now routinely post support materials and videos to the intranet, which was not possible before. “It's a kind of YouTube experience,” says Rosenberg. “You can watch the class after the fact right on the intranet.”

### Benefits for IT

“With Office SharePoint Server, IT can really remove itself from the day-to-day intranet management activities,” says Rosenberg. “We can designate page, site, and library owners, and they really can manage these areas without us. We have empowered them to put their own Web parts on pages, so they don't need to call us anymore to make that happen.”

“What they're calling for now,” adds Markowich, “are new features, new services. We've given them the tools, and they're causing this to blossom in amazing ways. Users are putting RSS streams on their home pages by themselves and taking steps into a realm where they were helpless before. That frees us to work on other projects that are valuable to the company.”

### Benefits to Client Team

Using Office SharePoint Server to integrate practices and client teams has also proven beneficial for the PR company's

practitioners—particularly those whose clients span more than one practice. With the launch of Fusion, they can now work with a SharePoint Team site in the cloud. In the past when a single client worked with more than one practice, that lack of access made it difficult for Edelman employees to access information about projects, discussions, and activities taking place in other practices and offices.

“Office SharePoint Server makes it much easier for Edelman teams to deliver a seamless service to their clients. Our clients can now feel like they’re working with a single agency, not three separate practices,” says Markowich.

Office SharePoint Server has even made it possible for Edelman to create extranet sites in which clients can access information and collaborate on projects directly with Edelman personnel. “We’re doing this on an as-requested basis right now,” says Rosenberg, “but it’s proving to be a very valuable space for those clients who are using it.”

“Edelman is the largest independent PR firm in the world,” Rosenberg goes on to say, “and *The Holmes Report* named us the ‘Best Large Agency to Work For’. A cited factor of this award was a reference to Edelman’s ‘first-rate intranet,’ so I suspect Fusion played a role.”

## For More Information

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For more information about Edelman products and services, visit the Web site at: [www.edelman.com](http://www.edelman.com).

## About NewsGator

NewsGator helps enterprises leverage social computing solutions to deliver real business value. The company’s enterprise social networking products are in use by 100s of the world’s most recognized brands. NewsGator Social Sites gives enterprises better ways to collaborate, share content, & expand employee knowledge.

## About Social Sites

Social Sites provides enhanced social computing for SharePoint 2007. Fully integrated with SharePoint, Social Sites features include Online Communities, Social Network Graphs, Social Profiles, Social Profile Building, Activity Streams, Innovation Management, Social Computing Analytics, Enhanced RSS, Social Bookmarking, & Social Search. For additional information, visit [www.NewsGator.com](http://www.NewsGator.com).

## Microsoft Media and Entertainment Practice

Microsoft Communications Sector Media and Entertainment practice provides media vertical services and supply chain companies with business and people-ready software and services to optimize their business process management throughout the media lifecycle, from advertiser/partner relationship and business management to the consumer experience and action. Microsoft’s enterprise software platforms and solutions enable media supply chain players to be seamlessly, dynamically, and securely connected to any point in the media business value chain, driving agility, accuracy, and efficiency.

For more information about Microsoft Communications Sector Media and Entertainment practice, go to: [www.microsoft.com/resources/mediaandentertainment/default.mspx](http://www.microsoft.com/resources/mediaandentertainment/default.mspx).

## Solution Overview

### Microsoft Server Product Portfolio

- Microsoft Windows Server 2008 Enterprise Edition
- Microsoft SQL Server™ 2008
- Microsoft Office SharePoint Server 2007

### Hardware

- HP ProLiant servers