



# Success Story



## About the Client

LiftFund is a non-profit organization that is headquartered in San Antonio, Texas. The organization provides credit and services to small businesses and entrepreneurs who do not have access to loans from commercial sources, as well as to offer leadership and innovation to the microlending industry. LiftFund has partnered with SBA lenders and other lending institutions to provide small business loans, SBA 504 loans, and microloans in Texas and throughout the South Eastern USA. Since opening their first office in 1994, LiftFund has helped thousands of people achieve the financial stability and growth they so richly deserve as a result of their vision and hard work.

## LiftFund The Rise of LiftNet!

Though LiftFund had found great success as a pillar in the communities that they serve, the decision was made in June 2018 to make some changes to the infrastructure. The company intranet at the time was outdated and did not have the functionality or the flexibility to allow LiftFund employees to work at their best. The team wanted a new digital workplace that was accessible without having to connect to the network, had the features and functionality needed for day to day tasks, offered better security for important company data, promoted and encouraged collaboration, allowed for employee surveying, etc. Above all however, the LiftFund team wanted an engaging, professional site that was easy to build and maintain.

After much research and due diligence into the feasibility of developing their own in-house SharePoint Intranet, LiftFund realized that this was not a route they were interested in pursuing. Accounting for the time and resources needed to develop a custom intranet (built to the specs/quality that they wanted), it was clear that this would be a monumental task. It was around this time that LiftFund found Powell Software and the digital workplace suite that they would set out to establish. LiftFund was thrilled with the beautifully designed intranets that Powell Software offered and saw great value in their SharePoint designer, Powell Manager. With this tool LiftFund saw the long term potential to be able to save time and resources in order to develop, maintain, and update their SharePoint site. Once the partnership was formed, the digital transformation began to quickly take shape.

"After spending some time researching our options we realized that any in-house development for a company intranet would be a massive project and would likely not result in the look, feel or functionality that we wanted. We were immediately drawn to the many different, unique aesthetics that Powell 365 offered, and saw great value in saving time and resources to develop and maintain our SharePoint intranet site using Powell Manager."

-DK Thepuatrakul, VP of Information Technology, LiftFund

After the decision was made to implement a Powell 365 intranet, LiftFund assembled a team to take on this project made up of their VP of IT, a SharePoint developer, and a Project Manager to coordinate and work with key users. In addition to the support that Powell Software was providing throughout the process, they referred LiftFund to trusted partner, RSM, in order to further assist and facilitate in the site implementation. After the hard work put into the project by LiftFund, as well as the guidance and training from both RSM and Powell, they were able to deploy their site in less than 3 months and are now able to maintain their site completely in-house.



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### About our Partner

RSM's unwavering focus on delivering a highly personalized and relevant client experience has remained the cornerstone of everything we do since our firm was founded in 1926. The RSM Client Experience is based on a client-centric focus, building long-term relationships and gaining a deep understanding of our clients' businesses, aspirations and challenges to provide relevant insights and solutions to help them succeed. RSM US LLP is the U.S. member of RSM International, a global network of independent audit, tax and consulting firms with more than 43,000 people in over 120 countries.

### About Powell Software

Powell Software is an International Software Vendor, that drives digital transformation by offering intelligent digital workplace solutions. Through our collection of easy to use collaboration, productivity, implementation and governance products, we help customers all over the world realize their digital workplace projects from A to Z with ease.

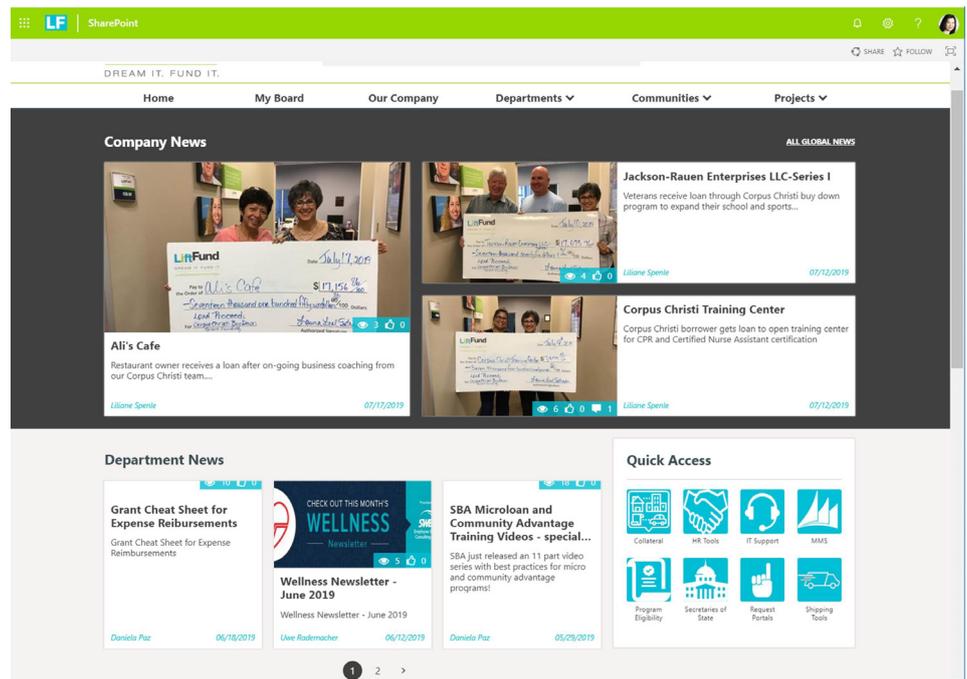


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The reaction and feedback within the company to the new intranet has been outstanding as over 50% of the LiftFund employees access the site daily (and this figure continues to rise). Employees were not only delighted with the site structure and design, but other tools or features that they requested were built and deployed within a few days' time. Other benefits LiftFund saw upon deploying their new site include:

- Improved communication and collaboration as a company - using project sites/pages to work and collaborate across the teams.
- Provided a gateway of communication as a company with Yammer availabilities
- Increased the number of employees utilizing the company intranet
- Empowered employees by training librarians (key users) to manage their documents themselves
- Decreased time for IT to manage and maintain the site
- Increased productivity as users can access company resources easier



With the new Powell 365 intranet in place, LiftFund now has the digital workplace tool to collaborate and communicate effectively. There is still much that can be done to improve their intranet and refine the employee experience, and LiftFund has begun this process as they plan to use their SharePoint site as the gateway for their Business Intelligence. LiftFund has always remained committed to growing their business and serving their communities, and this could not be more evident with their investment in a Powell 365 intranet.