



Success Story



About the Client

HJ Sims is a wealth management, investment banking & institutional services firm helping investors and organizations since 1935. From building wealth to building communities, HJ Sims provides clients unique tax-exempt and taxable opportunities, exceptional service and liquidity support. With their headquarters located in Fairfield, Connecticut, HJ Sims has 15 offices nationwide across 11 different states.

HJ Sims A Digital Workspace Transformation

Upon deciding that their legacy on-premises intranet solution was outdated and rarely used, HJ Sims set out to find a new intranet solution that would replace their old tool. In order to improve company communication and culture, and to continue providing their clients with the best services possible, HJ Sims needed a functional, branded intranet solution that would boost internal collaboration.

After their initial research and prep work to determine the key success factors to developing and implementing a new intranet portal, HJ Sims began their search. The main objective, however, was finding a solution that provided a user-friendly, centralized location to help employees facilitate and manage their strategic initiatives. Likewise, a solution that was natively responsive to Office 365 while being accessible from any desktop or mobile device within the company was another key criterion that any prospective intranet needed to be seriously considered for selection. Once these criteria were identified, HJ Sims began their search for the solution that would transform their digital workplace.

“We wanted to make sure we were providing relevant content in a place where employees could access and use the tools that they needed. Increasing employee efficiency and reducing the number of unnecessary clicks our teams must do in day to day tasks were also things we had hoped to improve upon.”

-Peter Opert, Director of Network and Information Systems, HJ Sims

To aid in the search for a new intranet tool, HJ Sims sought out the expertise of Synergy, an elite software consultant and implementation partner with a specialization in digital transformation. Having extensive experience with intranet projects and after working closely with HJ Sims to understand their project requirements and needs, Synergy recommended Powell Software's intranet tool - Powell 365. The main reasons for selecting Powell 365 were because:

- Synergy and HJ Sims liked that Powell 365 would allow for more control and to own/manage the intranet in-house once implemented
- Enabled Synergy to deliver the portal with OOB components/features that didn't require custom development and additional costs
- Ability to standardize and govern the page layouts and branding
- Provided a visually aesthetic, and easy to use/navigate interface



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About our Partner

Synergy was founded on the core belief that the right technology, when implemented correctly, can make your business better. Add great customer service and support and you have the makings of an organization that can guide you through the ever-changing world of business technology. For over twenty years, they have grown and adapted to the incredible changes in the world of IT and they bring that experience to the table. Synergy is here to be your technology partner, a go-to provider you can depend on for specific solutions to your business' unique technology needs.

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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Once the decision to implement a Powell 365 intranet was agreed upon in December of 2018, senior solutions consultants from the Synergy team worked closely with HJ Sims to meet all their project requirements. This close relationship that was formed led to the delivery of a quality solution by November of 2019. One challenge that HJ Sims did face was having to quickly get themselves trained and up to speed with SharePoint Online. Learning and becoming familiar with SharePoint Online, its nuances and how Powell 365 interacts with SPO is something that HJ Sims will continue to do as they expand and add on to their new site.

While still in the early stages of rolling out the tool and collecting feedback, the employee reception has been overall extremely positive. Now able to access a single, central repository for relevant content and information, the asset management department no longer must rely on continuous email threads as a part of their standard operating procedure. With everything available in just a few clicks, employee productivity, organization and effectiveness has already noticeably improved throughout the organization. Other improvements and positive benefits that have already been noted are:

- All employees are now utilizing the intranet portal
- Increase to IT knowledge base and training repository from 1-2 people visiting a month on avg to 260+ monthly visits
- Onboarding and training for new employees has become a more streamlined, effective process



Even with this new intranet being recently deployed, HJ Sims has begun planning for future enhancements and upgrades to their tool. This wish includes fully migrating to One Drive, fully migrating network shared storage, continuing department site collections development, etc.

“Powell 365 is a powerful solution that enables us to easily enhance and upgrade our clients’ portals. In a couple of clicks, we can easily update and redeploy a site or enhance existing capabilities with additional features to meet new needs. Delivery is simplified and as consultants, we can focus on works that bring more value to our customers like information architecture, governance, adoption plans and trainings.”

-Jason Blair, Senior Architect, Synergy

HJ Sims is a valued client of both Synergy and Powell Software, and will continue to be supported fully as they build out their portal. With generations of people having relied on HJ Sims and their services, Powell Software is proud to partner with Synergy to deliver a digital workplace that will allow them to work at their best.