

## Key Outcomes

75%

of ECM design and build led by Council staff reducing vendor dependency and building internal capability

83% attendance at taxonomy workshops

78% alignment of mapped migration paths

with the new file structure demonstrate strong staff engagement and successful change management.

AI-readiness established

through piloting Microsoft Copilot.

Decommissioned legacy ECM system

delivering licensing cost savings and streamlining operations.

High staff adoption

and cultural shift toward collaboration and compliance.

Improved collaboration and compliance

through a Teams-first approach and automated governance tools.

80% of staff indicated satisfaction

with the new functionality, as reflected in staff engagement surveys.

At Information Leadership, we believe our customers deserve confidence and control over their most complex information challenges. This case study highlights how our partnership with Bay of Plenty Regional Council (BOPRC) empowered their people to take charge of digital transformation – making information easier to manage, more secure, and ready for the future.

By guiding and supporting Council staff every step of the way, we delivered a seamless migration to SharePoint, reduced ongoing costs, and strengthened governance and compliance with iWorkplace™. The result: a modern, flexible solution that puts BOPRC in control and sets them up for ongoing success.



## Challenges

BOPRC is a future-focused organisation that was looking to modernise its ECM system.

The legacy platform was costly, siloed, and misaligned with the Council's digital strategy. Staff lacked confidence in managing information independently, and compliance risks loomed due to manual processes and fragmented governance.

The project required disciplined governance and financial stewardship, with a senior-led steering group maintaining oversight and making decisions when there was an impact on cost or user experience.

## Solution

BOPRC partnered with Information Leadership to deliver a business-led transformation, not just a tech upgrade. Together, they:

**Empowered internal teams:** Council staff led 75% of the ECM design and build, supported by Information Leadership's technical expertise, training, and peer review.

**Adopted a Teams-first approach:** Aligning ECM with familiar collaboration tools improved usability and engagement.

**Mapped content pragmatically:** Migrated content from activity-based taxonomy to M365 workspaces aligned Council's operations.


**Used a two-stage migration:** Archive/pilot first, then full rollout, supported by delta migration for accuracy and continuity.

**Automated governance:** Information Leadership's iWorkplace™ tools – Smart Labels, Smart Case Files, and Template Central – reduced manual effort and ensured compliance.

**Piloted Microsoft Copilot:** Introducing AI-enhanced support for smarter information access and future innovation.

**Prioritised change management:** Embedded change agents, tailored communications (using familiar language like "file structure" instead of "taxonomy"), and "train the trainer" methods ensured smooth adoption and reduced resistance.

**Responsibilities were clearly divided:** IL focused on advisory, technical capability, legislative expertise, peer review and assurance, while BOPRC led system design, build, mapping, change management, training and adoption. Regular stand-ups, steering group oversight, and senior leadership support ensured transparency, quick decision-making, and proactive risk management.



“This wasn’t just a system replacement – it was a drive for cultural change.”

BAY OF PLENTY REGIONAL COUNCIL  
REPRESENTATIVE

## Results

The transformation delivered measurable improvements:

**Cost savings:** Decommissioning legacy ECM platforms and consolidated licensing reduced long-term expenses.

**Efficiency gains:** Automation tools cut down manual classification and retention tasks.

**Improved service delivery:** Faster, more accurate access to information enabled better customer service.

**Cultural transformation:** Staff gained confidence, capability, and ownership of digital change.

**Strategic alignment:** The project supports BOPRC’s vision of being connected, collaborative, and futurefocused.

**Enhanced mobility and reduced information silos:** Efficiency and customer service have improved.

**SharePoint’s compatibility with Microsoft Copilot:** Demonstrates BOPRC’s readiness for AI-enabled services.

**Staff benefits:** Faster access to documents, more organised content, clearer responsibilities, tools that support internal and external collaboration, and reduced risk of data loss or inappropriate disclosure.

**Public impact:** More responsive services and greater confidence in Council’s information management.

**Long-term impact:** Automation and digital tools embed compliance and reduce operating costs, creating more capacity for staff to work on organisational priorities.

**Strategic impact:** The initiative strengthens BOPRC’s ability to innovate and integrate technologies such as AI into daily processes. More than a system replacement, it has served as a catalyst for more accountability from staff, better information management practice, and more efficient business processes.

“Our business teams now lead digital transformation with confidence, supported by intuitive tools and smart automation. Information Leadership helped us build capability, reduce costs, and prepare for the future. We’re not just managing information – we’re empowering our people.”

BAY OF PLENTY REGIONAL COUNCIL  
REPRESENTATIVE

Ready to transform Information Management? Get in touch today!

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CASE STUDY

# Transforming Information Management with Microsoft 365 & iWorkplace™

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